What’s New with Datatel UI

August, 2011
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## UI Keyboard Shortcuts

<table>
<thead>
<tr>
<th>Action</th>
<th>Key Combination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toggle between Person and Form Search</td>
<td>Ctrl+Shift+S</td>
</tr>
<tr>
<td>Change focus to UI form Menu Bar then use tab and arrow keys to access menu items</td>
<td>Ctrl+M</td>
</tr>
<tr>
<td>Show Search Results panel</td>
<td>Ctrl+Alt+R</td>
</tr>
<tr>
<td>Show Clear History dialog box</td>
<td>Ctrl+Alt+T</td>
</tr>
<tr>
<td>Show Advanced Person Search dialog box</td>
<td>Ctrl+Alt+A</td>
</tr>
<tr>
<td>Show Navigation panel</td>
<td>Ctrl+Alt+N</td>
</tr>
<tr>
<td>Show Favorites panel</td>
<td>Ctrl+Alt+F</td>
</tr>
<tr>
<td>Show Preferences dialog box</td>
<td>Ctrl+Alt+P</td>
</tr>
<tr>
<td>Log out/Close Application</td>
<td>Ctrl+Shift+L</td>
</tr>
<tr>
<td>Show Debug Information</td>
<td>Ctrl+Alt+B</td>
</tr>
<tr>
<td>Show Help (for current UI area in focus)</td>
<td>Ctrl+Alt+H</td>
</tr>
<tr>
<td>Show Keyboard Shortcuts</td>
<td>Ctrl+Alt+K</td>
</tr>
<tr>
<td>View all records in Context Area</td>
<td>Ctrl+Shift+M</td>
</tr>
<tr>
<td>Map current record in Context Area</td>
<td>Ctrl+Alt+M</td>
</tr>
<tr>
<td>Close current record in Context Area</td>
<td>Ctrl+Shift+X</td>
</tr>
<tr>
<td>Close all records in Context Area</td>
<td>Ctrl+Alt+X</td>
</tr>
<tr>
<td>Add current record in Context Area to Favorites</td>
<td>Ctrl+Shift+V</td>
</tr>
<tr>
<td>Add all records in Context Area to Favorites</td>
<td>Ctrl+Alt+V</td>
</tr>
<tr>
<td>Go to next record in Context Area</td>
<td>Ctrl+Shift+N</td>
</tr>
<tr>
<td>Go to previous record in Context Area</td>
<td>Ctrl+Shift+R</td>
</tr>
<tr>
<td>Launch Copy Window for current card in Context Area</td>
<td>Ctrl+Shift+C</td>
</tr>
<tr>
<td>Close open panels (and return to the main UI window)</td>
<td>Esc</td>
</tr>
<tr>
<td>Exit/Log out of UI 4.x</td>
<td>Ctrl+Shift+L</td>
</tr>
</tbody>
</table>
UI KEYBOARD SHORTCUTS FOR FORMS

The keyboard shortcuts listed below are available only when working within a UI form (alternative keystroke combinations separated by |). Most of these commands are also accessible from the UI Form menu. NOTE: Some of these shortcuts may not work in all browsers. Browser plug-ins or other applications may override these shortcuts and activate different commands.

<table>
<thead>
<tr>
<th>Action</th>
<th>Shortcuts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move to the next field</td>
<td>Tab</td>
</tr>
<tr>
<td>Move to the previous field</td>
<td>Shift+Tab</td>
</tr>
<tr>
<td>Open a drop-down list to select a value</td>
<td>Down Arrow</td>
</tr>
<tr>
<td>Scroll through the values in a drop-down list</td>
<td>Up/Down Arrow</td>
</tr>
<tr>
<td>Select the highlighted value in the drop-down list</td>
<td>Enter</td>
</tr>
<tr>
<td>Move forward one row in a window</td>
<td>Down Arrow</td>
</tr>
<tr>
<td>Move back one row in a window</td>
<td>Up Arrow</td>
</tr>
<tr>
<td>Move forward one page in a window</td>
<td>Page Up</td>
</tr>
<tr>
<td>Move backward one page in a window</td>
<td>Page Down</td>
</tr>
<tr>
<td>Move to the beginning of the current field</td>
<td>Home</td>
</tr>
<tr>
<td>Move to the end of the current field</td>
<td>End</td>
</tr>
<tr>
<td>Move to the first row of a window</td>
<td>Ctrl+Home</td>
</tr>
<tr>
<td>Move to the last row of a window</td>
<td>Ctrl+End</td>
</tr>
<tr>
<td>Field Insert</td>
<td>Ctrl+I</td>
</tr>
<tr>
<td>Field Delete</td>
<td>Ctrl+Alt+D</td>
</tr>
<tr>
<td>Cancel from current form</td>
<td>F8</td>
</tr>
<tr>
<td>Cancel from all forms</td>
<td>Shift+F8</td>
</tr>
<tr>
<td>Finish from current form</td>
<td>Ctrl+F9</td>
</tr>
<tr>
<td>Save current form</td>
<td>F9</td>
</tr>
<tr>
<td>Save all open forms</td>
<td>Shift+F9</td>
</tr>
<tr>
<td>Detail</td>
<td>F2</td>
</tr>
<tr>
<td>Exit/Logout</td>
<td>Ctrl+Shift+L</td>
</tr>
<tr>
<td>Help</td>
<td>Ctrl+Alt+H</td>
</tr>
<tr>
<td>Change focus to UI Form Menu Bar (then use Tab and Arrow Keys to access menu items)</td>
<td>Ctrl+M</td>
</tr>
<tr>
<td>Show Keyboard Shortcuts</td>
<td>Ctrl+Alt+H</td>
</tr>
</tbody>
</table>

If the current field within a window has a drop-down list, use Down Arrow to open the list, Up/Down Arrow to move up and down within the list, and Ctrl+Up or Ctrl+Down to move back or forward one row.
User Interface (UI) Overview

Log into the browser like Internet Explorer, Firefox, Safari, etc. and type datatel.bw.edu

If you would like to create a shortcut, just right click in the background area, and left click on “Create Shortcut”. The next time you want to log into Datatel UI you can just click on this shortcut.

The Login dialog box is displayed. Enter your user Datatel ID and password and click OK.
You will be presented with your **Main Navigation Screen**. This is the starting point for accessing processes or people.

**Logout**

When you are finished working in Datatel, be sure you click on the **Logout** button to close your connection to the server. Do **not** just close the window with the red button.

**Menu Bar**

The menu bar has been simplified and offers the following menus under each option.

**File Menu**

<table>
<thead>
<tr>
<th>Command</th>
<th>Key Combination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>F9</td>
</tr>
<tr>
<td>Save All</td>
<td>Shift+F9</td>
</tr>
<tr>
<td>Finish</td>
<td>Ctrl+F9</td>
</tr>
<tr>
<td>Cancel</td>
<td>F8</td>
</tr>
<tr>
<td>Cancel All</td>
<td>Shift+F8</td>
</tr>
<tr>
<td>Record Delete</td>
<td></td>
</tr>
<tr>
<td>Detail</td>
<td></td>
</tr>
<tr>
<td>Print</td>
<td></td>
</tr>
<tr>
<td>Logout</td>
<td>Ctrl+Shift+L</td>
</tr>
</tbody>
</table>
Options Menus

You can clear your Person Search History. See above

You can clear your Form Search History. See above
**Reload Colleague Session**

The **AUTO-CLOSE CONTEXT** option has Datatel close each record after you are done with it.

The **KEEP CONTEXT OPEN** option keeps all context records loaded. When you go to the next form, the current record will be loaded into the form automatically.

**Help Menu**

**Keep Context Open**
SAVE - Save changes and return to previous screen.
SAVE ALL - Save changes on this screen and all previous screens displayed and return to the menu.
CANCEL - Abort changes and return to previous screen.
CANCEL ALL - Abort changes on this screen all previous screens displayed and return to the menu.

Resize Your Screen

Slide the block to the size that you prefer. The next time you view this form it will remember this new size.

Print the Form, Add Form to Favorites, and Process Help

Search for a Person

Toggle to Search Icon for Person
Type the Name
Click Search or press the Enter Key

Search for a Form

Toggle to Search Icon for Form
Type the Form
Click Search or press the Enter Key

You can type a mnemonic like NAE to directly access a form, or a word like Address and any Form with the work Address in it will be listed.
1. The first time you open Datatel the screen will be blank. You will need to select a Person or a Form. A form refers to either a Screen or a Report.
2. Let’s start with a Form. Enter the mnemonic in the Search Form Field.

   a. You can also click on the Navigation tab and select the item.
b. You can also add this screen to your **Form Favorites** and select it from there.

To add to your Favorites list, select **Add Form to Favorites** and enter your mnemonic, and click on **Add**. You can even create subfolders in your Favorites to organize them if you desire.

To **Lookup a Person**, enter the ID# of the person, or enter firstname lastname (Test Student), or lastname, firstname (Student, Test). If you have just looked at information about this person on a previous screen, you can use the shortcut Shift 2, which is the @ symbol to bring up the same ID again.
Here is what it will look like if you type a common name like “/smith,john”
Either click in the box next to the person or anywhere on the row, or type the number of
the person in the “Section #” field at the bottom of this screen.
Click on ? to get detailed help on Search Results.

If you do not find the name or you need to leave the screen you can hit the Close icon .

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>DOB</th>
<th>Source</th>
<th>Where Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>John David Smith</td>
<td>3451 E. 73rd St</td>
<td>06/22/1981</td>
<td>ADM</td>
<td>APP, MAI, FIN, PER, STU</td>
</tr>
<tr>
<td>John David Smith</td>
<td>812 Herley Place</td>
<td></td>
<td>Source: ADM</td>
<td></td>
</tr>
<tr>
<td>John E Smith</td>
<td>1345 East 94th Street</td>
<td></td>
<td>Birth Lost:</td>
<td></td>
</tr>
<tr>
<td>John R Smith</td>
<td>10380 Wilder Road</td>
<td></td>
<td>Birth Lost:</td>
<td></td>
</tr>
<tr>
<td>John R Smith</td>
<td>1640 Augusta Dr</td>
<td>10/21/1969</td>
<td>Source: PAR</td>
<td></td>
</tr>
<tr>
<td>John S Smith</td>
<td>7136 9th Street</td>
<td></td>
<td>Birth Lost:</td>
<td></td>
</tr>
<tr>
<td>John T Smith</td>
<td>8788 Harris Dr</td>
<td></td>
<td>Birth Lost:</td>
<td></td>
</tr>
<tr>
<td>John-Michael Smith</td>
<td>7100 Timber Ridge Court</td>
<td></td>
<td>Birth Last:</td>
<td></td>
</tr>
</tbody>
</table>

Select #: 9 [Open]
**Filter, Card View, or Grid View**

You can filter the Search Results. If you click on the drop down arrow for *Filter* you can select either:
1) Combined – which is all Individuals and Organizations that match what you typed
2) Individuals – Individuals Only
3) Organizations – Organizations Only

**Card View**

Below your Search Results are in Card View. In the future we may be able to add pictures to go with the names.

**Grid View**

Below your Search Results are in Grid View. You can click on any column to sort the results by that column, so click on Name if you want an alphabetical list.

If you need to go to the next page of person records you can click on the next page arrow or if you want to go to the end you can click on the last page arrow. The reverse is also true. Click on the first page arrow to go first page arrow and click on the previous page arrow to go to the previous page.
CONTEXT AREA

Once you select a person/student the information is displayed in the **Context Area**.

<table>
<thead>
<tr>
<th>Benjamin Robert Hawkins</th>
<th>( Stu ID )</th>
</tr>
</thead>
<tbody>
<tr>
<td>1450 Willow Rd</td>
<td>Birth Date: 01/31/1990</td>
</tr>
<tr>
<td>Phone: 440-555-6543</td>
<td>Where Used: APP, MAI, FIN, PER...</td>
</tr>
<tr>
<td>Phone: 215-555-5885</td>
<td>Birth Name: Smith</td>
</tr>
<tr>
<td>Rocky River OH 44116</td>
<td>Entry Date: 12/01/65</td>
</tr>
<tr>
<td>Email: <a href="mailto:bhawkins@mail.bw.edu">bhawkins@mail.bw.edu</a></td>
<td>Reunion/Class:</td>
</tr>
</tbody>
</table>

The **Context Area** includes the name, phone numbers, and other various fields for this person/student. As you do lookups for individuals, they are added to your context area, so multiple individuals can be available. When you bring up a form, it will automatically load the current person showing in your context area, and you can cycle through your list if desired.

- **Mapping** – Provides a map of the person’s address.
- **Favorites** – Add one or more students to your Favorite list. This is very helpful if you are working with a group of people.
- **Launch Copy Window** – Launch a new browser window with the contents of the current context card in the format that lets you select and copy the text and then paste it into another application.
- **Help** – To access the Context Area help information.
- **Close** - To close a person record or clear all records from the context area.

**Email** – Clicking on the e-mail address listed will open window in your mail client with the e-mail address loaded.

- **Card Scroller** - If you have more than one context card loaded, you can click the right or left arrow to go to the various records.
- **Card Selector** – Dropdown window showing all current context cards allowing you to select which care is the active one.
Once *The Form* is displayed on the screen, you can move around using standard Windows functionality – mouse clicks, tabs, etc. If you want to resize your screen, slide the resize button to the size you prefer.

The parts of a form are:

- **Form Mnemonic**
- **Form Name**
- **Data Area**

**SAVE** - Save changes and return to previous screen.

**SAVE ALL** - Save changes on this screen and all previous screens displayed and return to the menu.

**CANCEL** - Abort changes and return to previous screen.

**CANCEL ALL** - Abort changes on this screen all previous screens displayed and return to the menu.
There are several *Types of Buttons* that perform various functions.

**Window Operation Button** - A Window Operation button enables you to insert or delete a row of data. When you click the Window Operation button, the Select Window Operation dialog box is displayed.

Click **Insert** to insert a new row above the current row.
Click **Delete** to delete the current row.
Click **Cancel** to leave the row unchanged and return to editing.

**Detail** - Goes to another screen showing more details on that item.

**Date/Calendar** - This brings up a calendar for you to use to select a specific date.

**Drop-Down Table** - This allows you to pick from a selection of correct items per field.
The **Report Browser** allows you to view reports easily in a Windows environment. The report browser is accessed whenever you choose **Hold/Browse** output for a report. During viewing, the browser imports the document one page at a time as requested, so that lengthy download times are avoided.

### Using the Report Browser Toolbar

- **First Page**
- **Last Page**
- **Import**
- **Print**
- **Print Remote**
- **Exit Report Browser**

**Title Bar**

**Tool Bar**

**Exit the Report Browser**

**Scroll Bar**
Import the Report

Click on the button.

The Download File screen will appear. Click on button.
Now you can save a copy of the report to your network or local hard drive. You are prompted to specify a name and path for the saved report.

Print the Report – (Export PDF)

Print the report to a Local Printer.

Click on the button.
On the “Export to PDF” screen you have the option to change the Font, Font Size, and/or the Orientation.
Then click on .
At this “Printing Preferences” screen you can select the Print Task Quick Sets, Copies, and Orientation, i.e., “Portrait” or “Landscape”.

Print the Report – (Print Remote)

To print the report to a printer that is accessible from the host. This option uses the operating system on the host to print the report without downloading it to your PC.

Click on the [Print Remote] button.
Enter your printer name, i.e. itland, regland, etc.
There are four types of **On-line Help** available.

- **Field Help.** An explanation of each field on each form.
- **Context Help.** A list of frequently used keyboard shortcuts.
- **Process Help.** An overview of each form.
- **Application Help.** A document of the overall help for the Colleague User Interface.

**Field Help**
To access field help while working in a form, go to the field for which you would like help, and do one of the following:
- Choose **Field Help** from the **Help** menu.

**Context Help**
Keyboard Shortcuts are keystroke combinations that can be used to perform functions that are normally accessed by using the mouse in Windows.
To access a list of frequently used keyboard shortcuts from any location within a form, choose **List Keyboard Shortcuts** from the **Help** menu.

**Process Help**
Process help provides you with an overall description of the purpose of the selected form. It does not provide detailed information about specific fields on a form. To access process help from any location within a form,
- Click the **Process Help** button on the menu bar.
- **Process Help** from the **Help** menu.

**Application Help**
Application help provides a document of the overall help for the Colleague User Interface. You can access it by clicking on the **button next to **.
On-line Help (Continued)

On comment screens, you can enter a **Date/Time/Login Stamp**.
Example: Go to the “SPRO” screen. Click on “Add’l Profile Data” detail button. Click on the “Comment/Remarks” detail button.
PREFERENCES

For the creative folks, you can modify some of your *Display and Operation Preferences*.

You can modify colors for various screens under Options, Preferences. Click on the color scheme you prefer, then click on Apply.
You can create your own Field Sequence for a screen and modify the Field Access Level for some fields. This is defined for each screen, for your username only. You need to be in the screen you want to modify, then choose Options, Customize Field Properties.

The first number is the field number. Then second number is the sequence the cursor will use when pressing Enter or Tab. Fields that have been modified are displayed in Red. Clear Field will remove a customization; Clear All removes all customizations for this screen and this user. You do not need to click Save after changing each field, only when you are finished with all your customizations.

To have screens modified for all users, or for multiple users, contact Administrative I.T.

You can show the current field sequence by going to Options, Show Field Sequence. To enable or disable the custom sequence, choose Options, Disable Custom Field Sequence. This setting is for the current session only.
The Navigation menu contains most of the menus, screens, and processes that you will need to view student and course information.

Click on the name of the screen you want to view. See the example above for SPRO.

~ OR ~

Type the Mnemonic selection in the Form Box and hit the ENTER key or click on
Choose SPRO from the Navigation menu or type SPRO in the Form box.

The Student Lookup Box will now appear.

Type in the Student’s Name, or part of the name. You can enter ‘Firstname Lastname’ or ‘Lastname, Firstname’ formats.

OR

The Student’s ID Number. This is always the best option.

Hit the ENTER key or click on “OK”
If more than one person matches the name you enter, you will get a Name Resolution screen.

Type in the number of the student you want and hit the ENTER key or
Click on the box to the left of the Student’s ID or anywhere on that row and then
Click on the Open Icon

If you do not find the name or you need to leave the screen you can hit the Close .
You can detail on any field that has a detail icon to the right of it by clicking on the icon.

Example: Click on the detail icon to the right of the field “Terms” to see the STRS - Term Summary Information.
You are now at the “STRS – Student Terms Summary” Screen for this Student and you can see all the Terms this Student has attempted or completed, starting with the most recent term.

This is also available directly from the main menu using the STRS mnemonic.

Click on the Cancel Icon to return to the “SPRO” Screen.
Click on the Detail icon to the right of ‘Transcripts’ to view Transcript information for each Term the Student has attended.
STUDENT PROFILE
Student Academic Transcript - STAT

Enter UG for Undergraduate or GR for Graduate and hit Enter or click “OK”.

Once this student completes a term, there will be GPA information on this screen. Detail on a Term or Credit Type to see related courses and grades on the ACTD screen. This is also available directly from the main menu using the STAT mnemonic.

Click on the Cancel Icon to return to the “SPRO” Screen.
Now you are back at the “SPRO” screen.

You can view Academic Program Information by clicking on the Detail Icon to the right of the “Academic Program” field.
You are now at the “SACP-Student Academic Program” screen showing the Academic Program details.

Only the primary Major information will show on this screen.
Click on the Detail icon to the right of ‘Program Additions’ to look at the student’s additional academic information.
You are now at the “STPA-Student Academic Program Additions” screen showing Additional Majors, Minors, and Specializations.

Click on the Cancel Icon to return to the “SACP” Screen.
You can detail in on the Student’s Advisors(s) by clicking on the Detail icon to the right of the “Advisors” Field.

You can click on the Cancel Icon to go back a screen or you can click on the Cancel All Icon to go back to the Main Menu.
LOCATOR – LOCR

Use Locator – LOCR to find a student for an emergency or for any reason. Click on the Detail icon to go to the Locator Screen. Some of you have the ability to access LOCR from the Main Menu. Just type in the student’s Colleague ID number or name. Then click OK or hit Enter.

Colleague will default to today’s date, but you can change the date, then click OK or hit Enter.
NOTE: The listed courses are not in any order. Take your time and find the correct time and then you can locate the course and building where the student is currently.

Emergency Contact information has now been added, too. So if something happens to the student you now have a name and phone number of who should be contacted.
Choose EVAL from the Main menu.

The Student Lookup box will now appear.

Type in the Student’s ID or Name then hit Enter or click on “OK”

If more than one person matches the name you enter, you will get a name resolution screen. Select the proper person (see page 28).
If the student has changed their Academic Program this screen will appear. Select the Academic Program that is still active, in other words, the one that does not have an “End Date”.

Type number of the Academic Program you want in the Select box and Hit the Enter Key.

Or click on the box to the left of the Academic Program and then click on the Open Icon.
EVALUATE STUDENT PROGRAM

EVAL

You have the option to print the Student Evaluation Report with a single column text, double-column text, or HTML (same as WebExpress). Double-column is the default.

Now you may click on the Save All icon.

SAMPLE OF A HTML

![Sample HTML report for a student evaluation with details about program, catalog, and program summary]
This is Page 1 of this Student’s EVAL Report.
Use the scroll bars to view other parts of this page.

To see the next page of this Student’s EVAL Report you can hit the “Page Down” button on your keyboard.

You can click on the black “Next Page” Button at the top of this Screen.

To print this EVAL Report just click on the “Export PDF” Button.

To Exit click on the “Exit Browser” Button at the top right of your Screen.

See page 17 for more information on using the report browser.