Colleague User Interface 4.5

Introduction

This document has been prepared to help you get started using the user interface for Colleague 4.5. This document also goes hand-in-hand with the Intro to Colleague workshop that is given periodically throughout the academic year.

How to Log In to Colleague 4.5:

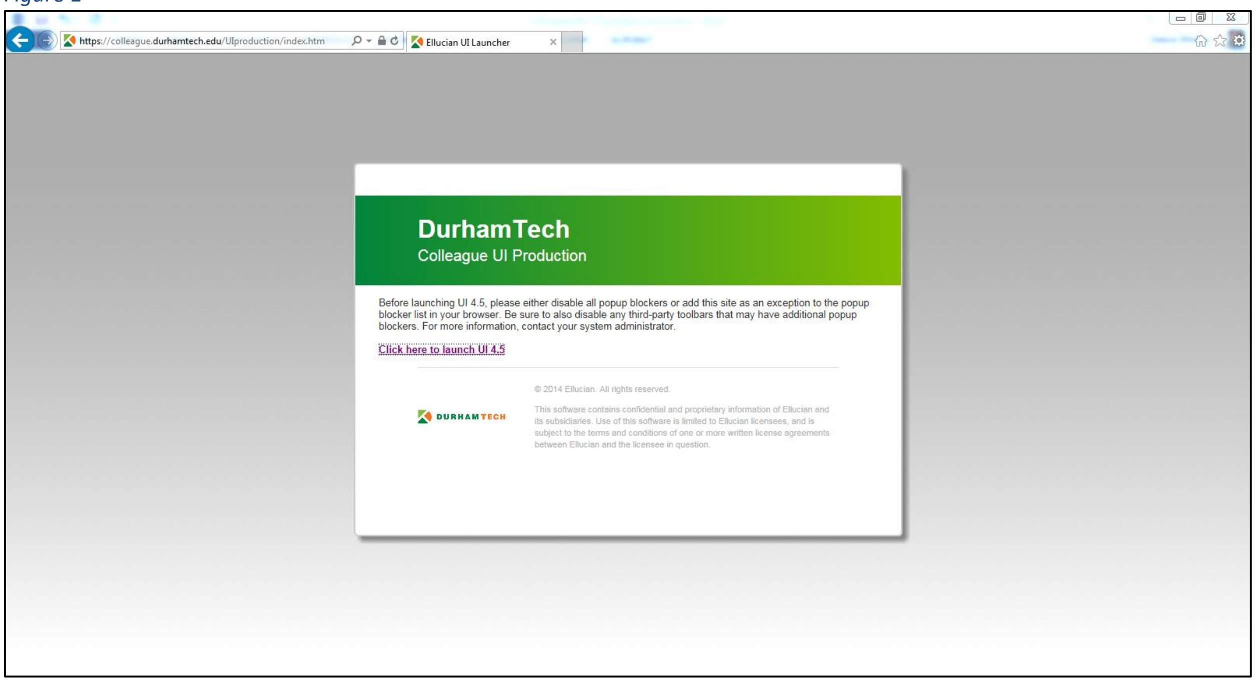
1) Open up an Internet Explorer window (this is the only web browser that is completely compatible with Colleague 4.5 at this time).
    a. Type the following into the address bar for the Production Account (*Figure 1*):

       https://colleague.durhamtech.edu/UIproduction/index.htm

    b. Type the following into the address bar for the Test Account:

       https://colleague-test.durhamtech.edu/UItest/index.htm

Figure 1



2) Click on the “Click here to launch UI 4.5” link to login to your Colleague account.

   a. If you receive a message indicating that your launcher window was blocked by the pop-up blocker, make sure you have turn off your pop-up block (a one-time only process) for the test and production websites for Colleague by completing the following steps:

      i. Click on the Gear symbol located on the upper right of the window below the minimize, maximize (restore down), and close buttons (*Figure 2*).

      ii. Click on the “Internet Options” option on the shortcut menu (*Figure 3*).

      iii. At the Internet Options dialog box, click on the “Privacy” tab, under the “Pop-up Blocker” section, click on the Settings button

      iv. At the Pop-up Blocker Settings dialog box, type the following into the “Address of website to allow:” text box and click on the Add button after each entry (*Figure 4*).:

         colleague.durhamtech.edu

         colleague-test.durhamtech.edu

      v. Click on the Close button.

      vi. Click on the Apply button.

      vii. Click on the OK button.

Figure 4

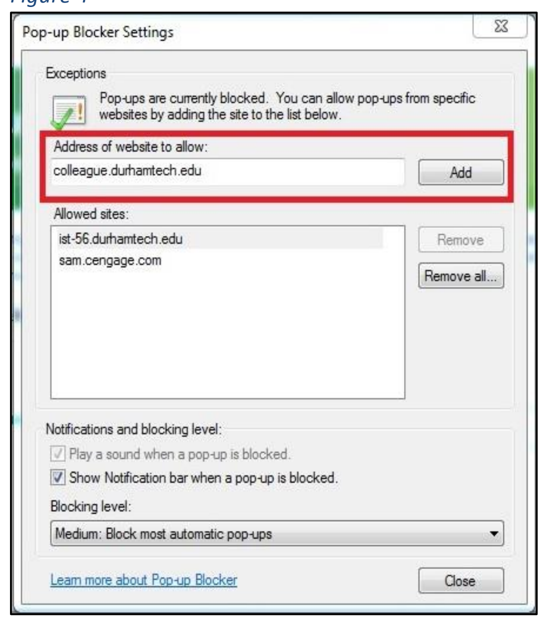


Figure 2

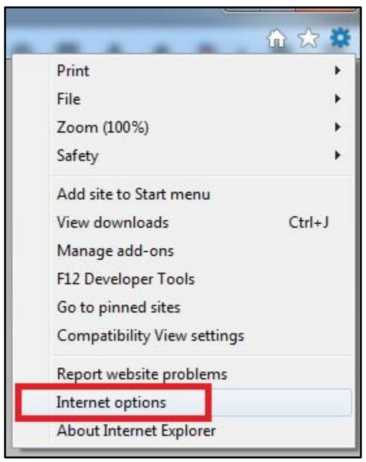


Figure 3

b. Once you are finished disabling the pop-up blocker (a one-time only process), click on the “Click here to launch UI 4.5” link again to log into your Colleague account.

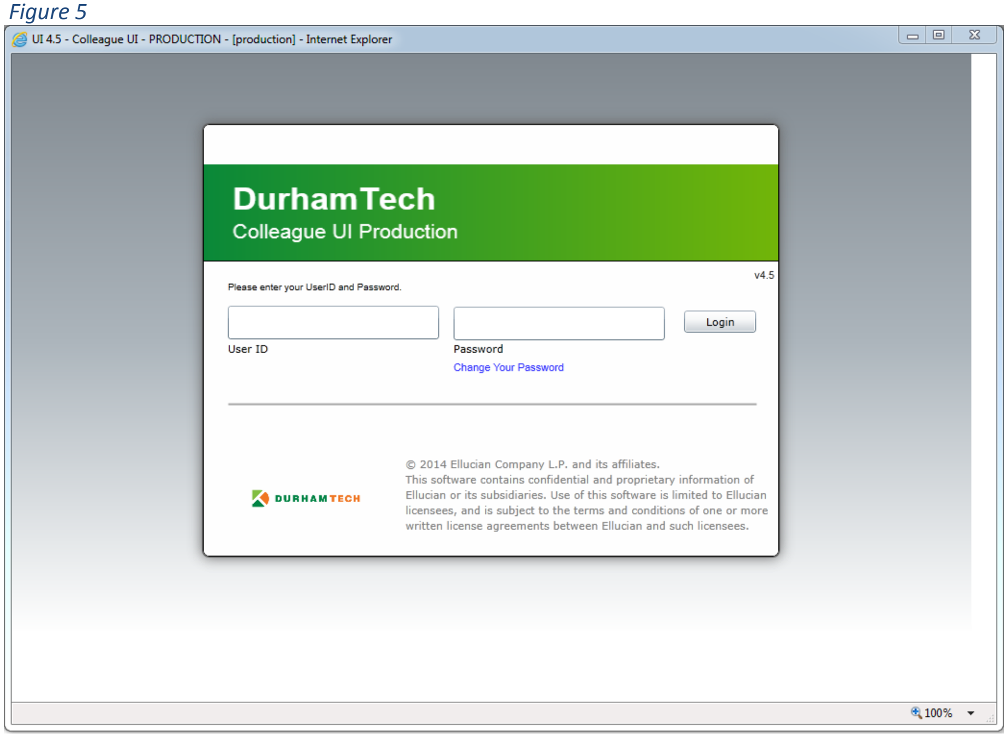
3) Type in your User ID and Password and then click the Login button (*Figure 5*).

Note: Colleague passwords are not synced to WebAdvisor passwords and are required to change every 90 days.

a. If prompted to change your password, you will need to type in your most recent password (this could be a temporary password assigned by ITS, if this is a new account or a password reset), a new password, and confirm the new password before clicking on the OK button.

b. Once you receive a message indicating your password was changed successfully, click on the OK button to proceed.

Figure 5



How to Use Colleague 4.5 Once Logged In:

1) A disclosure message should appear every time you login to your Colleague account (*Figure 6*).
2) Click on the OK button.
    a. If this is your first time logging into Colleague, a Quick Tour video will appear before the disclosure message (*Figure 7*). Everyone should watch this video at least once.
        i. Unless you mark/check the "Don't Show Me Again" check box at the bottom of that window the video will automatically appear every time you log into Colleague (*Figure 7*).
    b. You must click the Close button to receive the disclosure message and then click on the OK button to access Colleague (*Figure 6*).

Figure 6

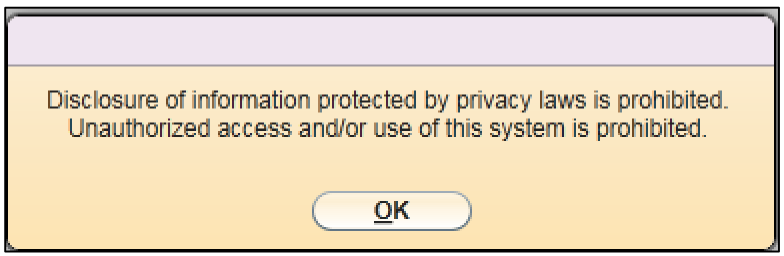
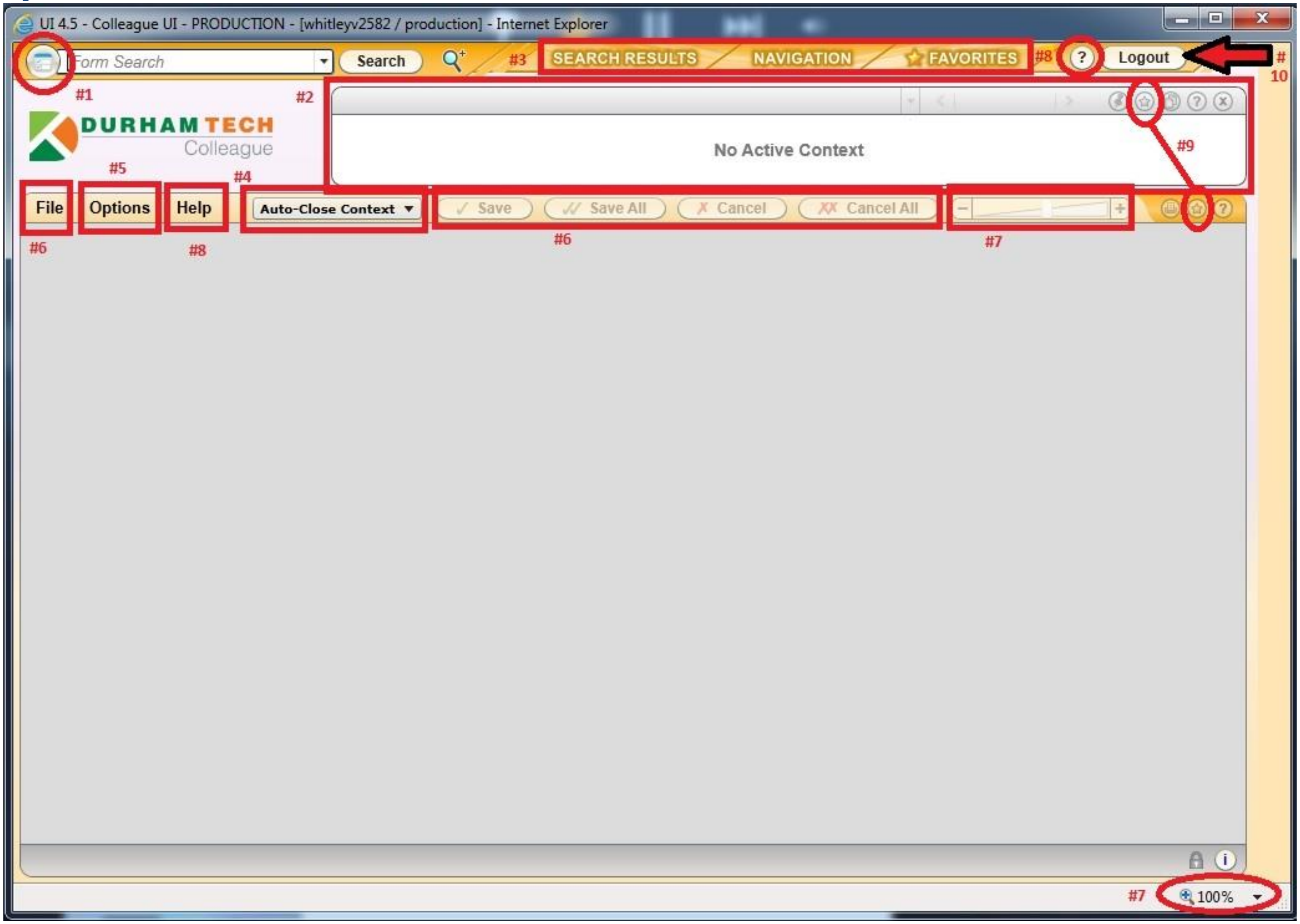


Figure 7

3) In *Figure 8* below, you will see some of the basic areas of the Colleague's window with descriptions listed below the figure.

Figure 8



#1 – This is the Form Search button (search mnemonics/screens) or the Person Search (search people) button. You can toggle between each search by simply clicking this button. In *Figure 8*, the Form Search button is currently being used. In *Figure 9*, you can see what the Person Search button looks like when it is toggled on.

Figure 9

#2 – This is the Context Area or the Name Card Area. It contains the basic demographic information (record) on the specific person, vendor, institution, etc. you have selected.

#3 – These are tabs that are used to display your search results, navigate various mnemonics you have access to, and your favorites are contained here as well.

#4 – This is a drop down box with only two (2) options. By default "Keep Context Open" will appear, which means that the Context Area/Name Card Area will keep open all of the people, vendors, institutions, etc. you look at as you move between mnemonics. In other words, it's like a running tally. Note: Be cautious using this option as well because Colleague will not allow more than one user to open a record that is already opened. The second option is "Auto-Close Context" and this will automatically close a record any time you "Cancel" or "Save" out completely from that person's, vendor's, institution's, etc. information.

#5 – The Options button is where you can go to change the color scheme of your windows (Preferences), clear search history, change passwords, and more.

#6 – The File button has the same features available from the Save, Save All, Cancel, and Cancel All buttons, and some more features as well. The Save buttons should be used with entering in data to make new entries or updated entries. The Cancel buttons should be used when no changes are made to a record.

#7 – The Zoom slider bar or the zoom drop down box are used to increase or decrease the font sizes within the gray portion of the window.

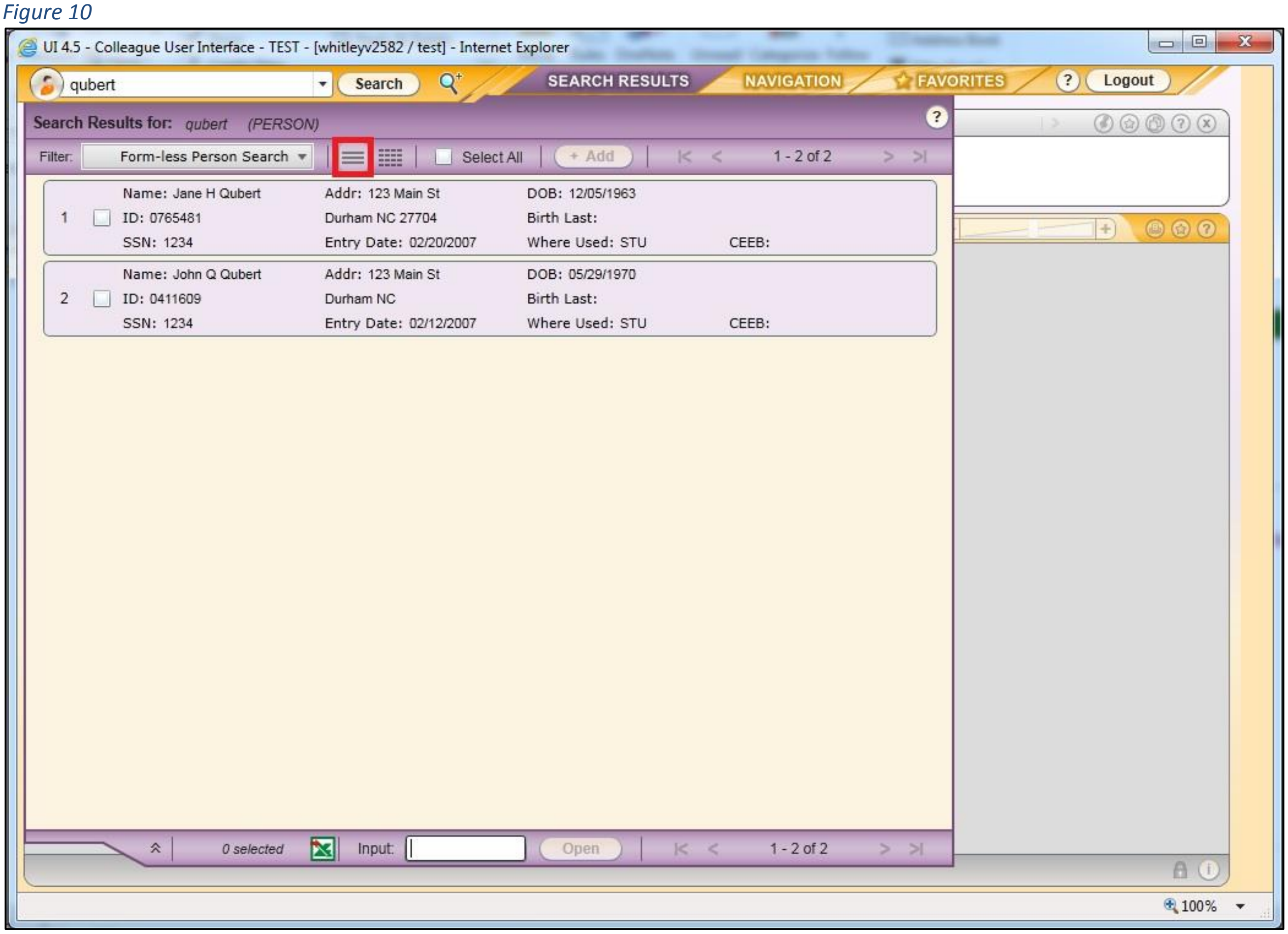
#8 – The Help button and the Question Mark button are used for field help, process help, a list of keyboard shortcuts, documentation from Ellucian, a location to find the Quick Tour video, and more.

#9 – The Star button is the Favorites button. This is what you click on to add a mnemonic/screen or a particular record to your Favorites tab.

#10 – The Logout button is just that and should always be used when you are finished using Colleague – NEVER use the red "X" button.

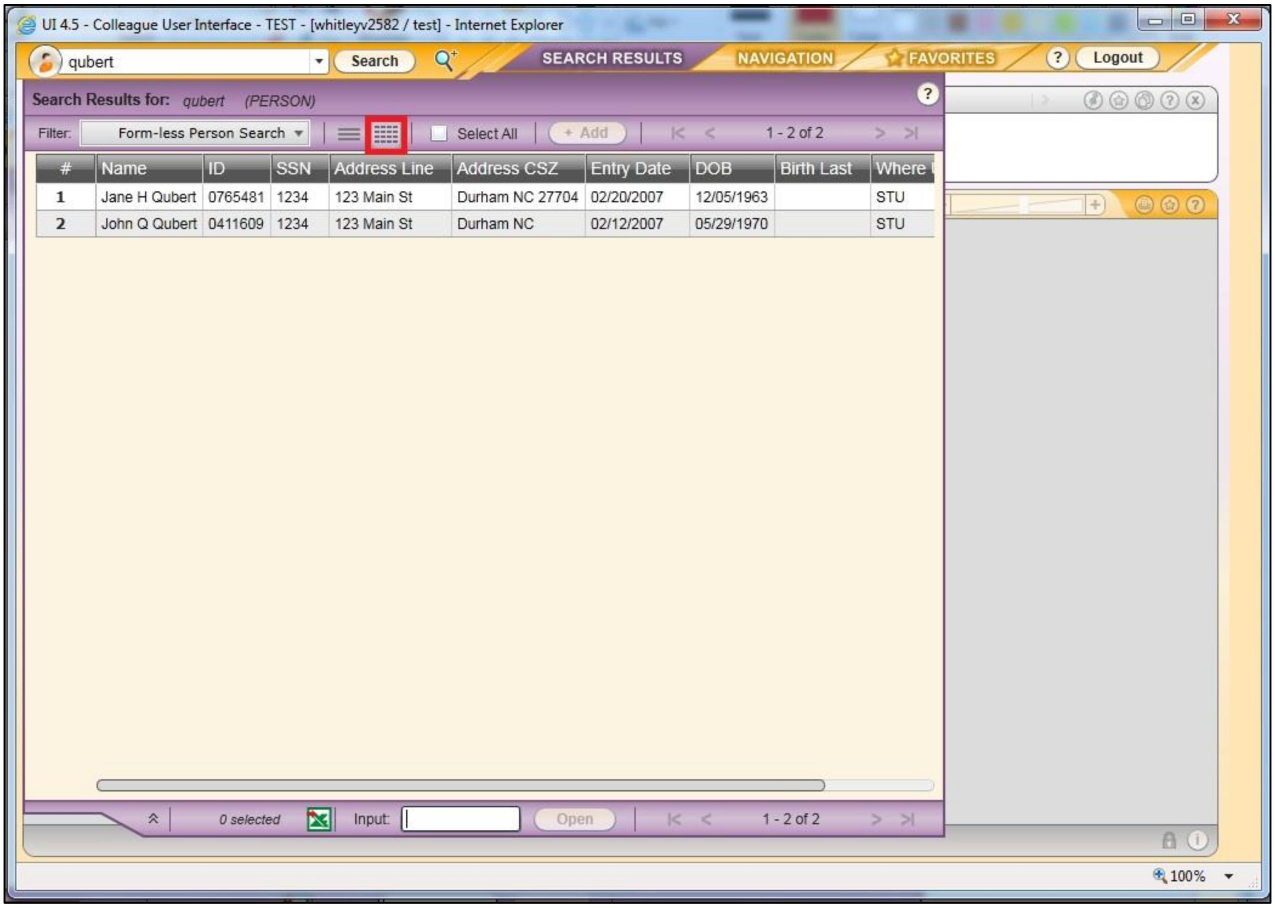
4) Anytime you do a general search (not ID# specific) for a person, vendor, institution, etc., your search results will appear under the Search Results tab in the default view, Card View (*Figure 10*).
5) You can also change the Search Results tab view to Grid View by clicking on the Grid View button (*Figure 11*). One advantage of using the Grid View instead of the Card View is that you can sort by the column headings by simply clicking on the one you want to sort by.

Figure 10



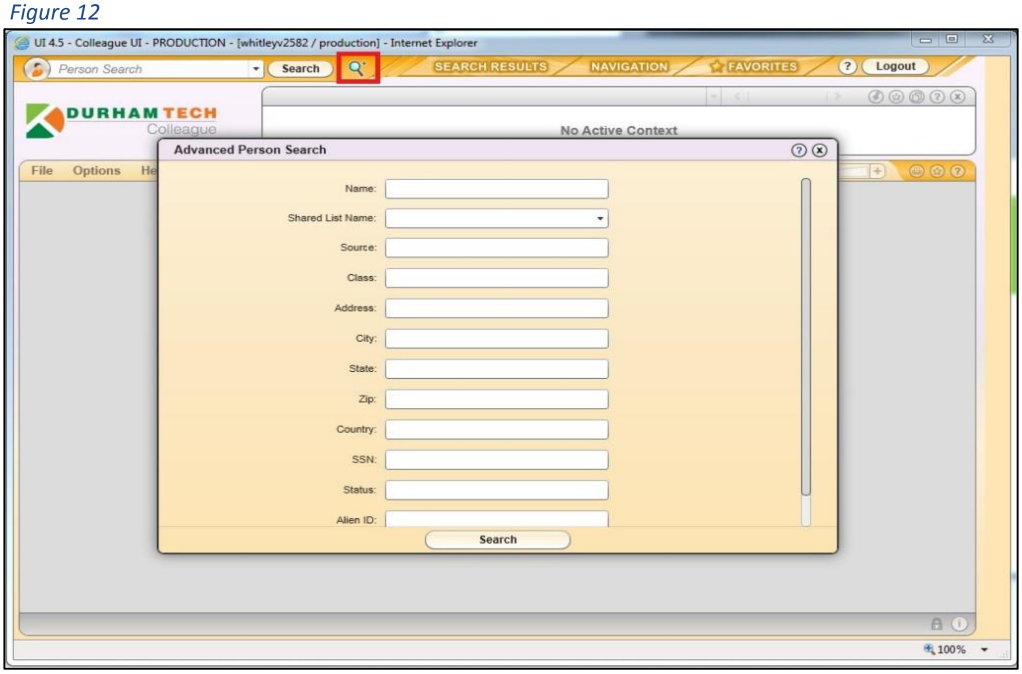
Note: There are other various ways to search for a person besides using an ID#, SSN, or name. For instance, you can also search by birth date by entering **;BIRTH.DATE MM/DD/YYYY** in the person search box. This is a great tool when the person has a common name.

Figure 11



6) You can also use the Advance Search feature by clicking on the Magnifying Glass and Plus Sign button located to the right of the regular Search button (*Figure 12*).

Figure 12



How to Create a Shared List/Saved List in Colleague 4.5:

1) Once you have added people into your favorites by clicking on the Star button in the Context Area/Name Card Area for those individuals, by default they are added to the People section under your Favorites tab (*Figure 13*).
2) Click on the Favorites tab, select the people you want to include in your shared/saved list (click and hold down either the Ctrl key or the Shift key) under the People section, click on the drop down box that has lines on it in the People section, and then click on "Create a Shared List" (*Figure 13*).
3) The Create Shared List dialog box will then appear with your initials and an underscore will automatically display in the "Shared List Name:" text box (*Figure 13*).
    a. Type a **unique** name after the underscore in that text box that you will remember for future uses and click on the Create button (*Figure 13*).
4) You have just created a shared/saved list.

Figure 13