

Ohlone College

UI Learning Guide

An introduction to using
Datatel's Colleague User Interface (UI)

Last Revised: 11/21/2006

Introduction

Purpose: To acquaint you with Datatel's User Interface (UI) and how to log on and off of the Colleague system, navigate through forms (Datatel's new term meaning a screen), and key tools available through UI.

Function keys that were used in "terminal mode" (FrontView) are available, HOWEVER, The following options are not available and REQUIRE you to use your mouse:

F4 – Field jump – there is no longer a function key for jumping – use your mouse, "Tab" or "Enter" through the fields. F4 is now Field/Group delete – use Caution! This feature will be disabled for UI.

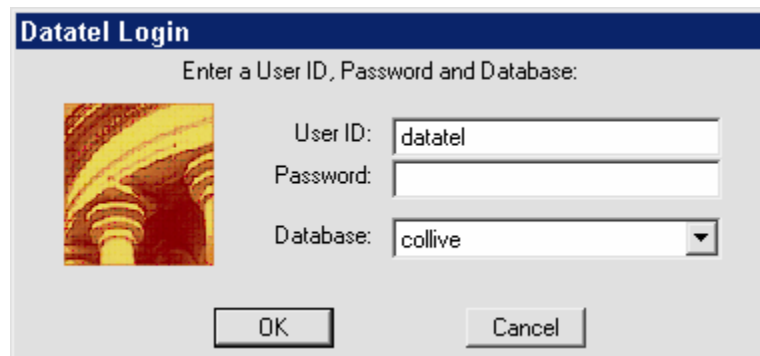
F1 twice – Valcode Value list

Logging In



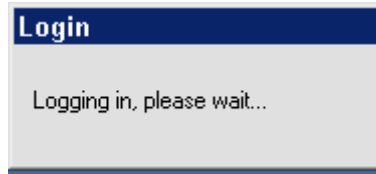
Datatel UI

- Double click on the UI Icon
This icon may be labeled "Datatel UI"
- Your User ID should default in if you were the last user to log in. If not update the User ID field with your login ID.
- Enter your password – It will not display in the field
- Select a Database (account) – you may see many available, however you will only be able to access the accounts you are authorized to use.
- Click OK or press "Enter" to begin the login process

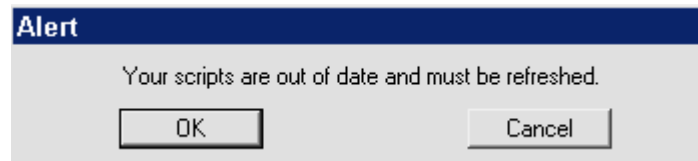
A screenshot of the Datatel Login dialog box. The title bar reads "Datatel Login". Below the title bar, the text "Enter a User ID, Password and Database:" is displayed. To the left of the input fields is a small image of a classical building facade. The "User ID:" field contains the text "datatel". The "Password:" field is empty. The "Database:" field is a dropdown menu with "collive" selected. At the bottom of the dialog box are two buttons: "OK" and "Cancel".

Datatel Login	
Enter a User ID, Password and Database:	
User ID:	<input type="text" value="datatel"/>
Password:	<input type="password"/>
Database:	<input type="text" value="collive"/>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

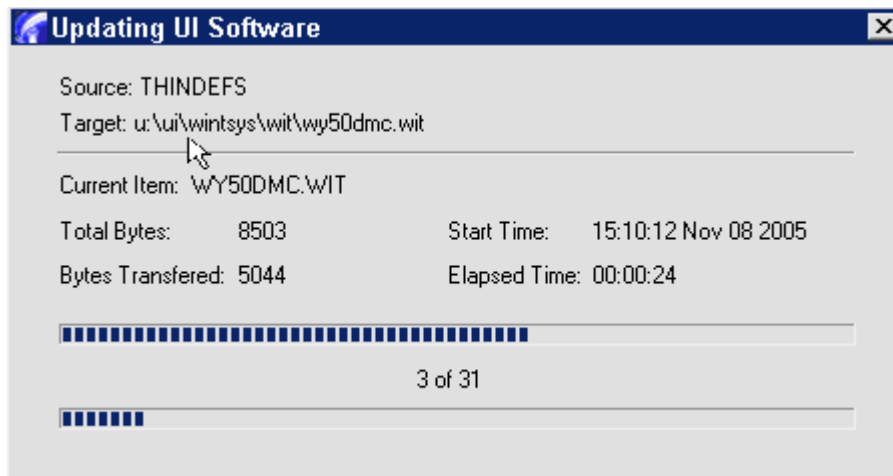
The following window will be displayed for a brief moment



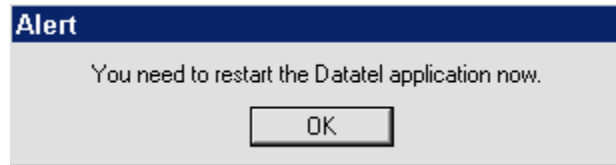
You may be prompted to load your scripts if changes have been made to parameters (and in some cases on your initial login). This is NOT a problem. Scripts control how the interface communicates with each colleague database.



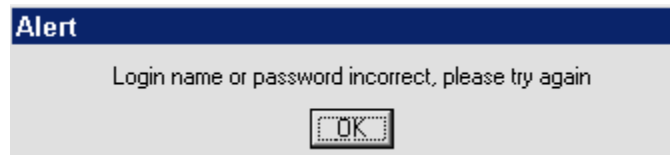
- After you click OK or press "Enter" , the dialog box will display while the scripts are updated



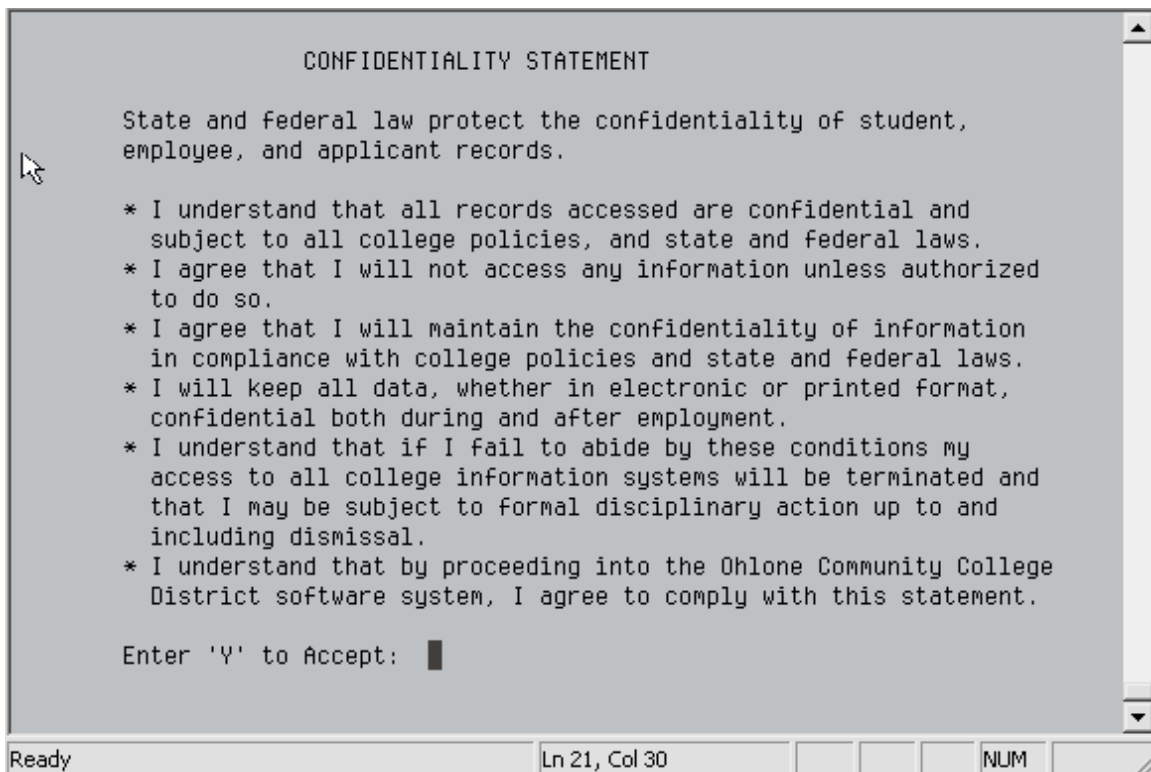
- When the scripts have completed, click OK or press “Enter” and double click on the UI icon again.



- If you have a typo in your User ID or Password, click OK or press “Enter” and check your User ID and reenter your password.



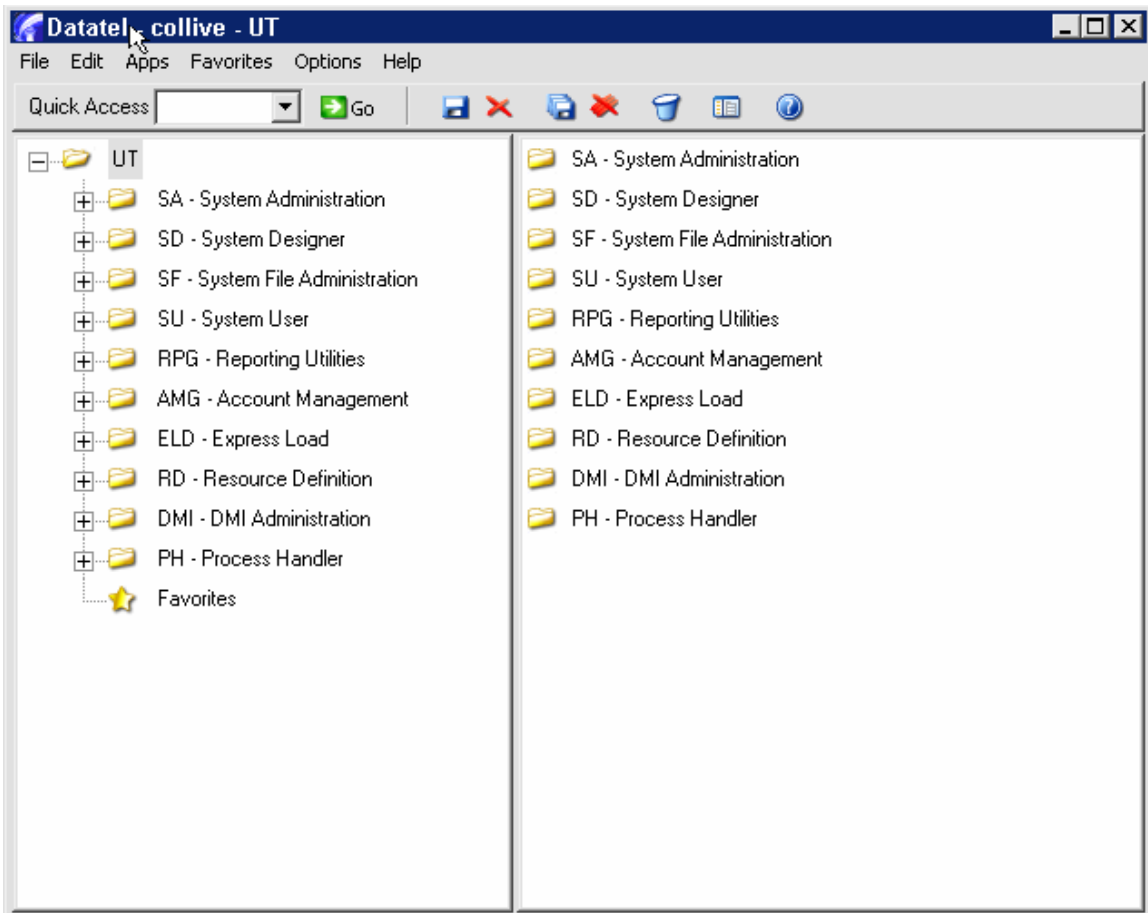
- The confidentiality Statement will display. You must reply with a "Y" and press “Enter” to continue or the system will log you off. (you CANNOT use your mouse here!)



The following dialog box will display as the application is loaded. The application will default to whatever application was last accessed prior to logging out. On your initial login to a database, the UT application will load. Use the “Apps” pull down menu to select the desired application.

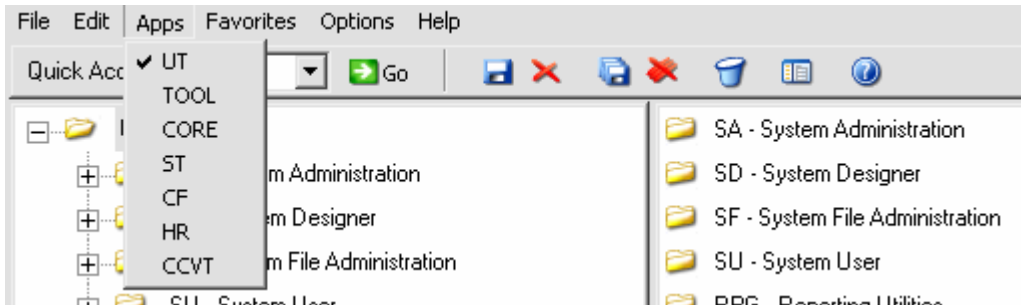


Colleague will open a two column window

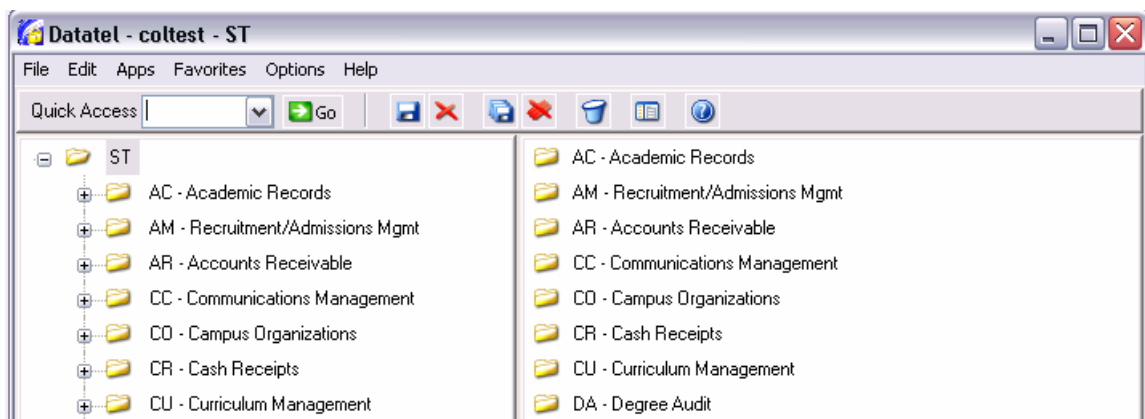


Changing Applications

- To change applications, you cannot enter the new application in the “Quick Access” box, you need to select the “Apps” pull down menu, and select the desired Application.



After selecting your application, the window will redisplay with the forms you have access to for that application.

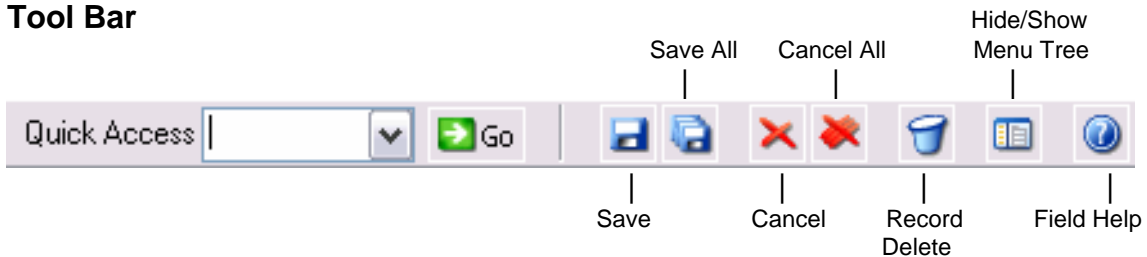


The columns function just as Window's Explore. The folders on the left can be expanded. The current folder items are displayed on the right.

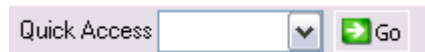
- To expand a folder, click on the PLUS sign (+), once it's open, you can click on the MINUS sign (-) to collapse it again.
- You may also double click on a folder to open it. When you do this, the items in the folder will display on the right.

Colleague UI Icons

Tool Bar



Quick Access



The Quick Access field enables you to access any form directly by entering its mnemonic, or by using the drop-down menu button to select a recently used mnemonic. Press “Enter” or click “Go” to display the selected form (main keyboard “Enter” key only – Due to a bug, the numeric keypad “Enter” key does not work on this field). **Menu's cannot be entered into the Quick Access box**, you must expand the folders in the Menu Tree list to find available mnemonics.

Save and Cancel



The Save All and Cancel All buttons and the corresponding File drop-down menu options, enable you to save or cancel all of your changes simultaneously to every form that is currently open in this session. The Save and Cancel buttons enable you to save or cancel changes to the current form.

Record Delete



The Record Delete button is used to delete an entire record, and works only for forms that have been defined to allow this option. When you click this button, you are prompted to confirm that you want to delete the entire record.

Hide/Show Menu Tree



While a form is open, you can allocate more viewing space to it by clicking the Hide/Show Menu Tree button. The left menu tree pane closes, and the form occupies the entire window. Click the Hide/Show Menu Tree button again to toggle this option off and display the menu tree in the left pane.

Types of Forms

Maintenance



Allows you to enter and change data that is permanently recorded in your database; for example, a person's name and address.

NOTE: If you have read-only access to a maintenance form, you will be able to access it in inquiry mode only, even though it displays the Maintenance icon in the MenuTree.

Processing



Allows you to start a program that manipulates a record or group of records behind the scenes; for example, posting a group of transactions to the general ledger.

Inquiry

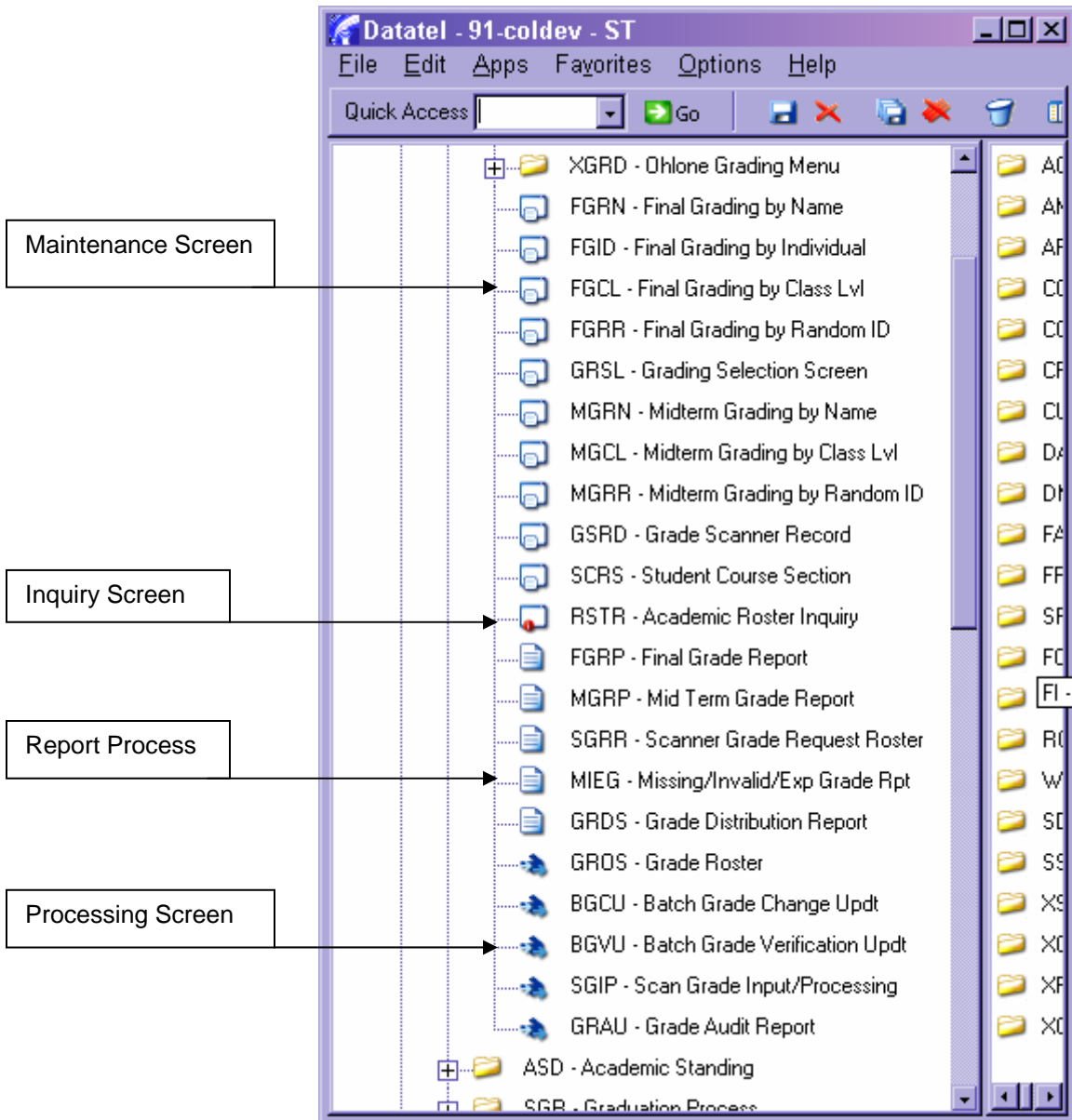


Allows you to view information without changing it; for example, the history of a general ledger account. Strictly speaking, inquiry forms are forms that are designed to display information without allowing changes to that information. In contrast to an inquiry form designed as such, you may also access a maintenance form in inquiry mode if you have read-only access to it. Although the effect for you is the same, a maintenance form viewed in inquiry mode is, nevertheless, different from a form designed specifically as an inquiry form.

Reporting



Allows you to generate a particular report according to your specifications. For example, today you may wish to see a report on vouchers with a due date two weeks from now, and tomorrow you may decide you want to see the same report for vouchers with a due date four weeks from now.



Accessing A Form

Forms, formerly referred to as screens, can be accessed in several ways.

- Probably the easiest is to enter the known mnemonic into the "Quick Access" box and press "Enter". Use the main keyboard "Enter" key only – Due to a bug, the numeric keypad "Enter" key does not work on this field.
- Use the "Quick Access" drop-down menu button to select a recently used mnemonic. Press "Enter" or click "Go" to display the selected form.
- Double click on any form in the menu tree on the right or item list on the left.

Resolution Forms

A resolution form allows you to select one or more items to review on a form.

- To select one item, either enter the item number and press “Enter” in the “Control Lookup Prompt” , or check (click) the box to the left of the item and click on the save button either in the tool bar at the top of the form, or at the bottom of the form. F9 function key also works as a “Save”.
- To select more than one item, If using entered item numbers, you must first enter an "F" in “Control Lookup Prompt” to indicate you will be flagging multiple items, then enter the desired numbers for the items. Or, just click the box to the left of each desired item. When selecting multiple items you must use “Save” to select the items. Either by clicking a save button or F9.
- To scroll thru the pages, you can use the scroll bar to the right of the list, or press “Enter” to page down. The page up/down keys will also work.

Click to Select Item

Seq	Course	Sect	Term	Course Title	Location
1:	MATH	101A	04	2005FA Calculus With Analytic G	Newark Ohlon
025136	N. Atique			Active	09/07/05
09/07/05	12/15/05	NMH	NMH-304	LEC MW	06:30PM 09:20PM
2:	MATH	101A	02	2005FA Calculus With Analytic G	Main Campus
025134	A. Nguyen			Active	08/15/05
08/15/05	12/15/05	6	6205	LEC MTWTHF	09:00AM 09:50AM
3:	MATH	101A	03	2005FA Calculus With Analytic G	Main Campus
025135	R. Staszkw			Active	08/15/05
08/15/05	12/15/05	12	HH-112	LEC MWF	09:25AM 10:50AM

Controller LookUp Resolution Page 1/44
Seq Number, (F)lag, (S)ort/Select, (A)dd: [] [Save] [Cancel]

Form Navigation


General movement

To navigate through the fields on a form, you may

- Use your mouse to click on any field and "jump" to that field.
- Press the "Tab" key to move from field to field,
- Press the "Enter" key.


Note that "Tab" will take you to the next field, even if the field has multiple values. The "Enter" key will allow you to step through the multiple values, or you can use the scroll Button to the right of the field.


Detail Button

Some forms give you only limited or summary information about a certain item, but provide you with the capability of moving to another form. This form, which is known as a detail form, provides more complete information on that item. To the right of the field is a Detail button , which allows you to detail to another form for more information. Function key F2 can be used to detail as well.


Scroll Button

Scroll buttons enable you to view multiple values. There are two different types of scroll buttons:

Small buttons  appear to the right of fields that display one value at a time.


Larger buttons  appear to the right of fields that display two or more values at a time.

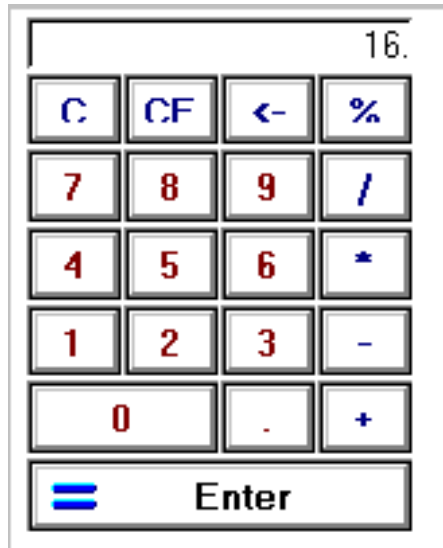
Date/Calendar Button

A Date/Calendar button  appears to the right of each date field. Click the Date/Calendar button to display the calendar browser. Click on any date to populate the field with that date.




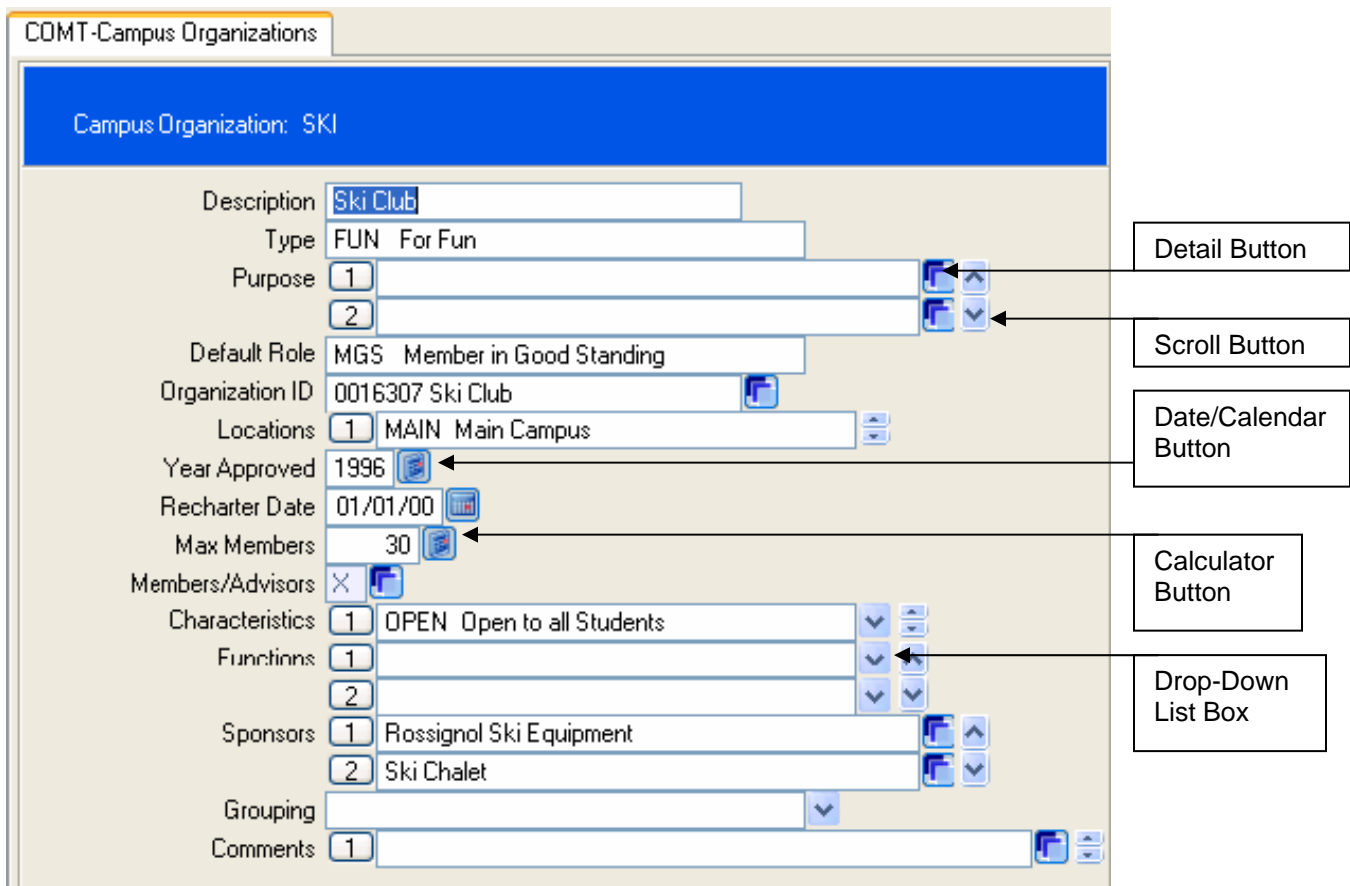
Calculator Button

A Calculator button  appears to the right of each numeric field. Click the Calculator button to display a calculator. Enter calculation using the numeric keypad or main keyboard, or use your mouse to click the calculator buttons, press or click “Enter”



Drop-Down List Button

A Drop-Down Table  button appears to the right of each field that has a predetermined set of valid entries. Click the Drop-Down List button to display a list of valid codes. The F1/F1 feature does not work to list the fields. There is no keyboard shortcut available at this time.



The screenshot shows the 'COMT-Campus Organizations' window for 'Campus Organization: SKI'. The form contains several fields with various control buttons to their right. Callouts on the right side of the window identify these buttons:

- Detail Button:** Points to a small square icon with a magnifying glass next to the 'Purpose' field.
- Scroll Button:** Points to a small square icon with a double-headed arrow next to the second 'Purpose' field.
- Date/Calendar Button:** Points to a small square icon with a calendar icon next to the 'Year Approved' field.
- Calculator Button:** Points to a small square icon with a calculator icon next to the 'Max Members' field.
- Drop-Down List Box:** Points to a small square icon with a downward arrow next to the 'Functions' field.

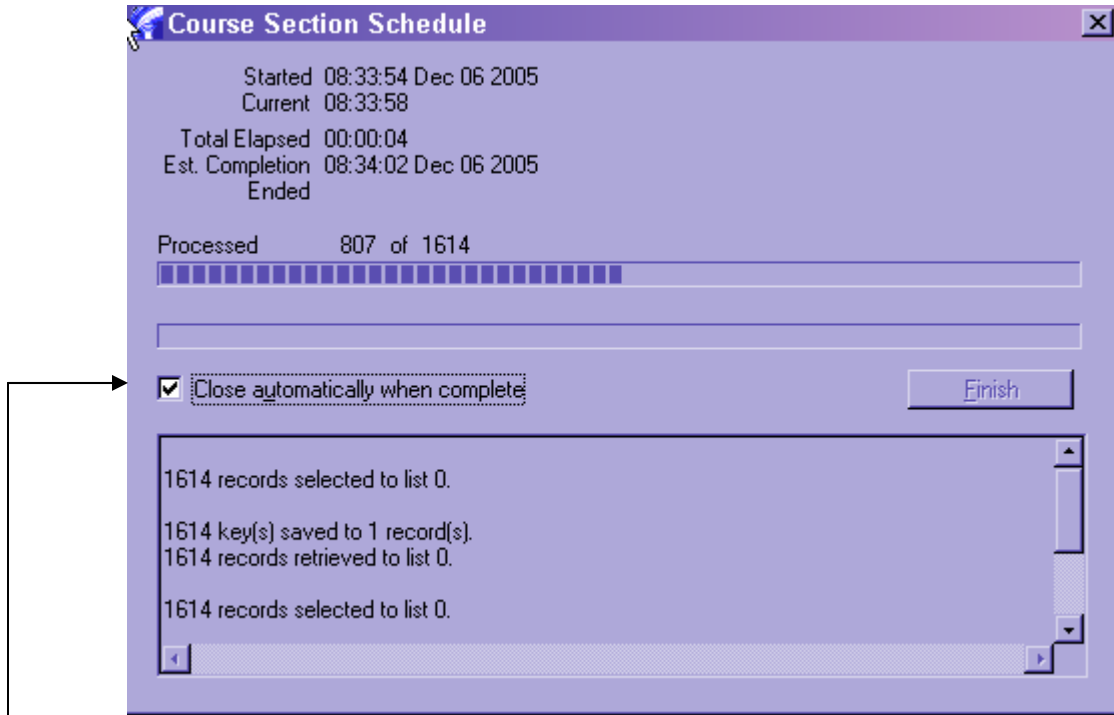
Multiple forms

- When detailed into multiple forms, you may select any of the tabs across the top of the window to reference data on a prior form, however, you cannot make any updates, you must save or cancel the changes to the last (most current) form, and back out to the earlier form to make changes. In the example below, from the SECT screen, detailed into SOFF, which detailed into RSM and a final detail into RMSC. You can click on any tab to reference data on a prior form.



Using the Browser and Printing

When running reports, the bar graph will appear in a pop up window as the report progresses through the selected data.

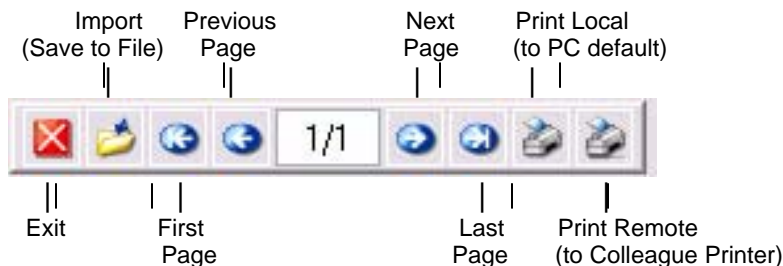


The first time you run a report , you have the option to click the "Close automatically when completed" box. When the processing is complete, the window will close. Once checked, future runs of any report will have the option enabled until the option is unchecked. There are times you may not want the window to close automatically, for example, if you suspect a selection error.

Output to HOLD

After the processing has completed, if you have selected the report to go to the HOLD file, the "Report Browser" will display.

The Browser tool bar:



The browser allows you to view the report with a full 132 characters display. For reports longer than 132 characters, you will need to use your scroll bar or keyboard right/left arrow keys to view the complete report.

Once in the report, you can use the arrow keys in the tool bar or your page up/down keys on your keyboard to move between the pages. These keys move you to the top of each page. To view data at the bottom of a page, you will need to use your scroll bar or your up/down arrow keys on your keyboard. The down arrow key and scroll bar will only take you to the bottom of the current page, you must use the arrow keys in the tool bar or the page up/down keys to move to another page.

Printing from HOLD

If you chose to print the report after viewing, you have the option to print to your PC's default (local) printer or to a Colleague (remote) defined printer. The option for printing to the local printer is beneficial when working from off site or when a shared Colleague printer is not available. Formatting may not be as expected as when printing to the Colleague defined printer.

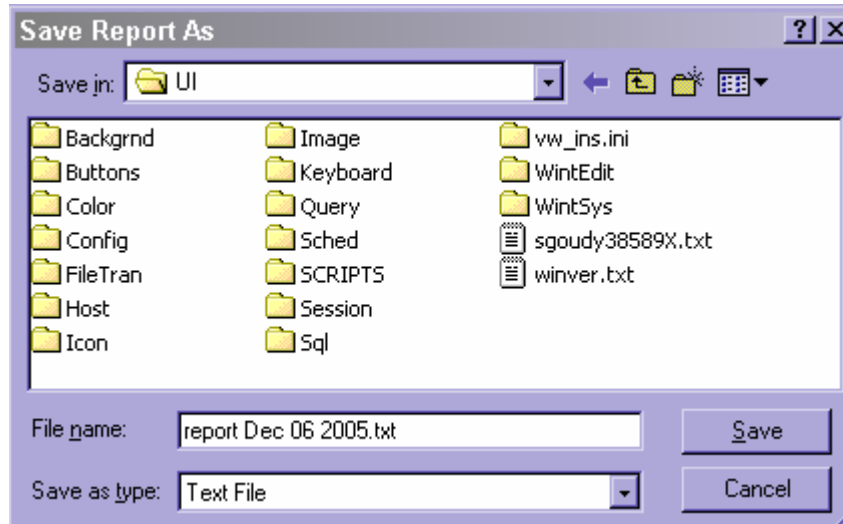
When printing to a Colleague printer, the printer definition form will display.

The screenshot shows a window titled 'UTFB-Sequential File BROWSE Shell' with a sub-tab '-Sequential File Browse'. The form contains the following fields and options:

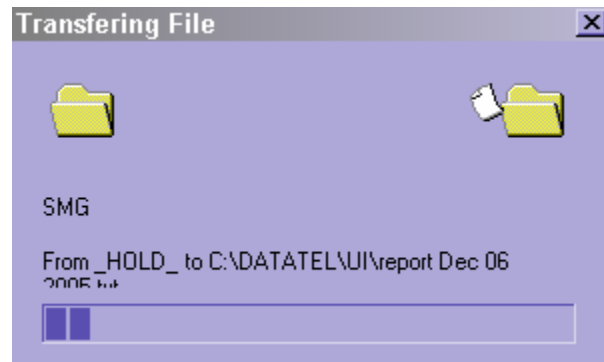
- Output Device: A dropdown menu with 'H' selected.
- Printer: An empty text input field.
- Form Name: An empty text input field.
- Banner: An empty text input field.
- Copies: A text input field containing the number '1'.
- Defer Until: An empty text input field.
- Other Options: A section with four numbered rows, each with a text input field and a button on the right:
 - 1 NFMT
 - 2 NOEJECT
 - 3 NHEAD
 - 4
- Page Width: A text input field containing '132'.
- Page Length: A text input field containing '57'.
- Top Margin: A text input field containing '0'.
- Bottom Margin: A text input field containing '0'.

Transferring a Report from HOLD

Transferring your report to your PC is also very easily done, no ftp required. Simply select "Import" from the tool bar to save your report to your PC. The "Save Report As" dialog box displays and allows you to select any location available to save the report.




After selecting a folder and a File name, click Save and the "Transferring File" dialog box will display.



Direct Printing

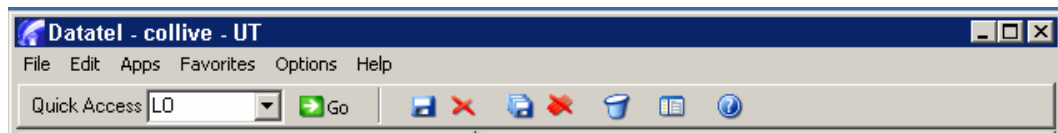
When a report is sent directly to a printer at run time, instead of to the HOLD file, only Colleague printers may be used.

Print Screen

PrintKey 2000 is a utility installed to allow you to send a “screen shot” to the printer. Simply press your “Print Screen” key on your keyboard to capture the window to your printer. PrintKey 2000 has other options you may explore by clicking on its icon  in the notification area of your task bar or select from your Programs listed under your Start menu. If the PrintKey window is displayed when you press the “Print Screen” key, the direct print option may not be set. This can be set by either right clicking on the icon in the task bar and selecting the “Direct Print (No Dialog)” option, or in the open window, select “Direct Print (No Dialog)”.

Logging Out

- To log off the system, Enter LO in the “Quick Access” box and press “Enter” on the main keyboard, or click "Go". This is the preferred method, however, you can also click on the File pull down menu and select “Exit”, OR click the "X" in the upper right corner of the window.



Customizations

You can customize the look and feel of your forms as well as setting up favorites. Check out the Favorites and Options pull down menus. Experiment and have some fun.

Favorites: You can use the Favorites pull down menu to store and organize a list of shortcuts to forms and functions that you frequently use.

Options: Colors – don't like the defaults – change them from the Options pull down menu, select “Change Colors”. You can change background and text color for just about any kind of field – inquiry, detail, required, experiment and have some fun.

SHEL - Colon Prompt Access

If your security allows for "Colon Prompt " access, you can access it by entering "SHEL" as a mnemonic. "EX" is not a valid mnemonic. NOTE that SHEL does not always function identically to Colon Prompt and there may be issues with query builder and computed columns (I-descriptors).

There are no menus or tool bar options when in SHEL. You must use the following commands to copy/paste:

Copy	<Shift><Delete>
Paste	<Shift><Insert>

Other useful options:

Scroll to the top of the page	<Control><Home>
Scroll to the end of the page	<Control><End>
Scroll to the previous page	<Control><PageUp>
Scroll to the next page	<Control><PageDown>
Scroll up one line	<Control><UpArrow>
Scroll down one line	<Control><DownArrow>

Known Issues

The following is a list of Datatel's known issues. Bugs are listed as low impact, with a priority between B and C (A is highest).

Numeric keypad “Enter” Key: This key works as a regular “Enter” key on most entries using UI, however, when entries are made into the “Quick Access” mnemonic box, only the main keyboard “Enter” key will work, the numeric keypad will not. You may also use your mouse and click "GO". The answernet document referencing this bug is 4422.26 "UI: ENTER key on numeric keypad works inconsistently", however this document was canceled and removed from the answernet database by Datatel. The information was received from info-datatel.

Mouse setting “Snap to Default”: If you have set up your mouse to “Snap to Default”, where the mouse pointer is supposed to move the default button of the dialog box, it will not work with UI. In fact, you'll find that your mouse location moves regardless of where you've last placed it. Answernet document bug: 14083.89 - UI:mouse pointer behavior not Windows standard behavior for Snap to Default

Field Delete: There are a number of ways to delete a field in UI, however not all options work on all forms. On most forms, either Ctrl+D and DEL key will remove information from field. Function HELP indicates the following can be used when deleting a field: Ctrl+D; Alt+F, F; Alt+E, D; or F4. On some forms, the alternatives do not work, and you must use Ctrl+D. Answernet document bug: 4423.81 - UI: ways to 'field delete' not the same for all screens

Value lookups on a field: When you are entering data into a field which valid values come from a code file, you can view all the available codes by entering ... (dot dot dot) in the lookup window. However, in UI, if data already exists in the field, you are not prompted with the lookup prompt as you are in character mode. Answernet document enhancement: 4421.56 - UI: lookup fields using 'three dots method' unclear. Request for another indicator like the 'drill down' buttons.

Script Error 6041: Some processes will generate a script error. This bug has a work around. From the “Options” pull down menu, select “Reload Scripts”. After your scripts have been reloaded, you will need to restart UI. Attempt your process again. If you continue to get the script error, contact IT. Answernet document bug: 8632.96 - UI:UIRM reload of current session results: 6041 script: invalid command