

Colleague UI4.3 Documentation

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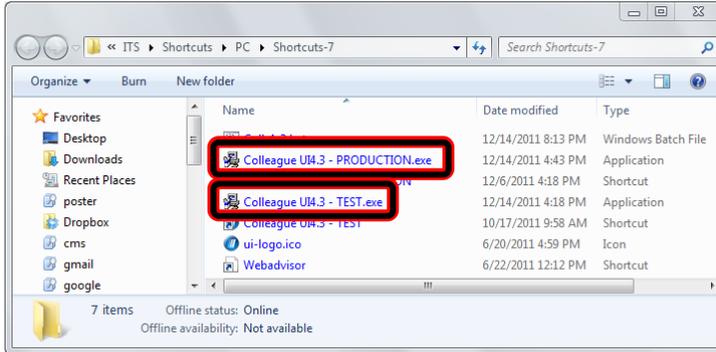
For the most up to date version of this documentation, please visit the ITS Website:

General ITS Website.....<http://www.augustana.edu/x795.xml>
Colleague Documentation<http://www.augustana.edu/x38327.xml>

Getting Started

Add the Shortcuts to your Desktop

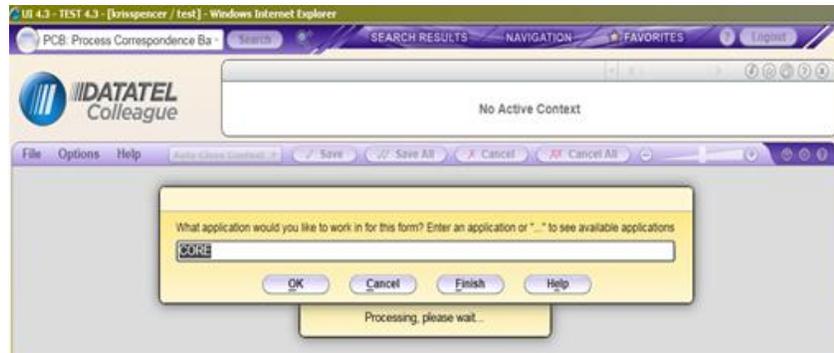
1. Go to the **Start** menu.
2. Type this path into the **Search** field (or click **Run** and type the path into the **Run** field):
S:\ITS\Shortcuts\PC\Shortcuts-7
3. Click **OK**.
4. A window should open up. Double click on the files **Colleague UI4.3 – PRODUCTION.exe** and **Colleague UI4.3 – TEST.exe** to install the shortcuts for your desktop:



5. Follow the directions to proceed with the install.
6. Move the shortcuts to where you would like.

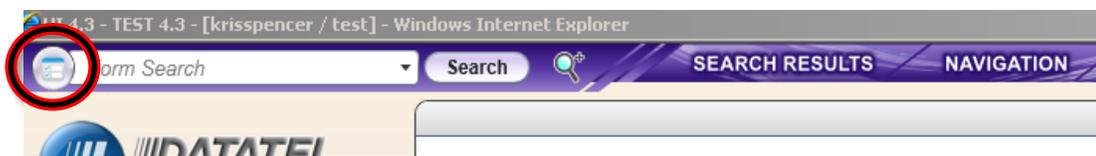
Searching for and Using Forms

In UI4.3 you no longer need to define which application to search within and switch between applications. The UI switches between applications for you, behind the scenes, depending on which form you open. The same Colleague application hierarchy is still used; it's just kept from the end user to ease the process of searching. In the event that there are duplicates in your search results, UI4.3 will prompt you to choose an application to work within.



Begin Your Form Search

1. Ensure that **Form** is selected by clicking the **Search Toggle** button. You can then search for, and execute a Colleague form by mnemonic or by description.



2. You can search by mnemonic, as you would with UI Desktop.

New Feature: Alternatively, you can use the new UI feature that enables you to **search by a word(s)** in the title of the form. For example, if you don't know the title, or want to see all forms with 'student' or 'vendor' in the title, you can search with those words.

Forms that match the search criteria entered will be displayed on the **Search Results** panel where you can then select the specific form you wish to use. Colleague resolution forms have been replaced by the Search Results panel, allowing for the flexibility to view things like purchase orders or code files in a grid view and sort on any column of data that is displayed.

Form Search Results

All form search results are displayed on a single page. You may need to use the scroll bar if necessary. Like in Grid View, you can sort information by clicking on the column headers. You can also order the columns by dragging and dropping. **Note:** You can only select one form to open (unlike when searching for people).



#	Name	Mnemonic	Application
1	1099-MISC Delete Vendor	MIDV	CF
2	Annual Vendor Update	VENU	CF
3	Rebuild 2004 Vendor Tax Hist	RTXH	CF
4	Rebuild Vendor Balance Field	RVBF	CF
5	Vendor Activity Inquiry	VENI	CF
6	Vendor Activity Selection	VENS	CF
7	Vendor Address List	VENA	CF
8	Vendor Commodities Maint	VNCL	CF

The Navigation Tab

Another way to choose your form is to click on the **Navigation** tab on the top menu bar. The Navigation panel provides the traditional, familiar Colleague menu structure. Here you can use the **Application Selector** (drop-down list) to choose which application's menu structure to view – one application at a time. If you don't have permission to use certain forms, you will not see them in this list.



The **Navigation** panel includes the following features:

- The **Single Expand** and **Multi Expand** buttons define how many menus can be expanded at one time.
- Use the **Scrollbar** to view entire list of search results.
- Choose your form and then click the **Open** button to launch it. Alternatively, you can simply double-click a form name to launch it.

Form Menu Options



Colleague forms are displayed in the UI Form Area. If you are a UI Desktop user, you may be wondering how you navigate to the main Colleague options.

Dropdown Menus (File, Options, and Help)

The standard Colleague menu options are located at the top left corner above any form



Save and Cancel

Located at the top center of the form



Print

Allows you to directly print the current form along with the Person in the context associated with the form:



Favorites and Help



Make forms bigger or smaller

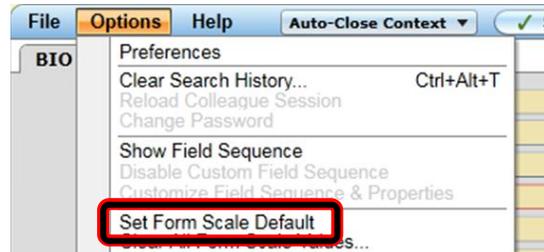
You will also notice the **Zoom Slider** that allows you to re-size the current form (this will become the default for this form)

Note: You can use this to set a certain scale for an individual form:



Set a default zoom level for forms

1. Set the scale value to the level that you prefer using the **Zoom Slider**:
2. Go to the **Options** menu and choose **Set Form Scale Default**:



From this point on, the scale will be set to that level when you work in all forms.

Use Shortcuts to Copy/Paste

You can cut, copy or paste text in any field in a UI form by selecting the text and using the standard keyboard shortcuts (Ctrl+X, Ctrl+C and Ctrl+V).

Saving Comments

When you click on an additional information button, a Comments form opens (below) allowing you to export and save the text shown on the comments form.

Using the Context Area

Objectives

1. Navigate the Context Area.
2. Add new records to an existing list in the Context Area.
3. Use the Mapping feature.

Context Area Functionality

The **Context Area** displays information about the person or organization that you are working with. Each person or organization is represented by a record, or a 'card':



The **Context Area** can hold multiple person or organization cards (but not both types) at a time. When multiple cards are loaded, you may use the **Card Scroller** (< | 2 of 2 | >) to navigate through the cards in the order they have been loaded into the Context Area:



To do this, simply press the **Next Card** (< | 2 of 2 >) and **Previous Card** (< 2 of 2 | >) buttons to see records. Alternatively, to jump quickly to a specific card in the context area, you can use the **Card Selector** drop-down:

New Feature! You can email directly from the email address link in the context menu! Clicking on an address will launch your email client and send an e-mail directly to that address from within Colleague.



Context Area Buttons

Within the context area of UI4.3, you will notice a row of buttons that can be used to access features such as **Favorites**, **Copy**, **Help** and **Close**.

The **Favorite** button () enables you to easily add records to your favorites list. The **Copy** button () can be used when a record is open, to access a text only version of that record. The recorded information can easily be copied and pasted into other applications such as Word, Excel or any other applications that will accept pasted text. This feature is useful if you should want to use the information within Colleague for other purposes. The **Help** button () is always available if you should need assistance using the Context Area. You can use the **Close** button () to close the current record open, or all the records at once.

Favorites and Shared Lists

Objectives

1. Add to **People Favorites**.
2. Add to **Form Favorites**.
3. Use **Favorites** to execute a form.
4. Create and use a **Shared List**.

Adding Favorites and Organizing with Folders

You can have the same person ‘favorited’ in different folders, but not the same person in the same folder. You can also drag you favorites between folders. The **Person Favorites Options** icon and the **Form Favorites Options** icon, provide access to **Collapse All**, **Expand All**, **Remove Selected**, and **Rename**.

To Add to your Favorite’s List

1. Put the person in your context area:



2. Click on the Favorites button:



- If there are multiple people in your Context Area, you will need to choose whether you want to favorite only the person whose record you are currently viewing or all of the people in your Context Area:



3. Choose from the dropdown which folder you would like to add the person/people that you have chosen.

Note: If you want the person to show up directly in the favorites menu, you should choose **People Favorites**.

- At this point you can create a new folder if you need to:

1. Click on the **New Folder** button.



2. Name your folder.

3. Choose which folder to put your new folder

Note: If you want it to show directly on the main favorites dropdown, choose **People Favorites**.

4. Click the **Create** button.

5. This brings you back to the **Add to Favorites** window. Choose your new folder from the menu:



4. Click **Add**.

Note: There is also an **Add to Favorites** button on the UI Form toolbar, so you can add forms to your Favorites as well.

Accessing your Favorites

Accessing your favorites is easy; simply click the tab labeled Favorites on the menu bar at the top of the page. The Favorites panel is used to select and manage existing favorites. It is divided into two areas; one for People Favorites and one for Form Favorites. You can use Control and Shift keys to select multiple people at a time, while selecting a form, and then press Open to launch that form with those records loaded. This is an easy way to choose Favorite people with a favorite form and begin working on those items at the same time.

Searching for a Person

Rather than selecting a Colleague form first, and then selecting the person or organization, UI4.3 allows you to select the person(s) or organization(s) first, and then choose the Colleague form. **You are still able to choose your form first and search for a person the way you did in UI desktop.**



The Search Area is used to

- Choose the type of search to perform; Person/Organization or Form.
- Enter the search criteria (name, partial name, SSN, Colleague ID, etc.).
- Perform a search or access the **Advanced Person Search** feature.

Procedures for a Basic Person Search

- Click the **Search Toggle Button**, in the Search Area and select the **Person** option.



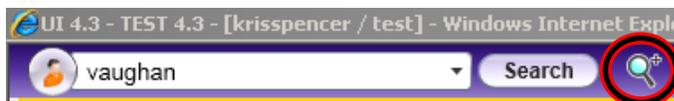
- Enter your person search option, such as the person's name or Colleague ID, in the search box.



- Click **Search** or press **Enter**.



The Advanced Person Search



Procedures for an **Advanced Person Search**:

- In the Search Area, click the **Advanced Search** icon.
- In the Advanced Person Search dialog box, enter your search criteria.



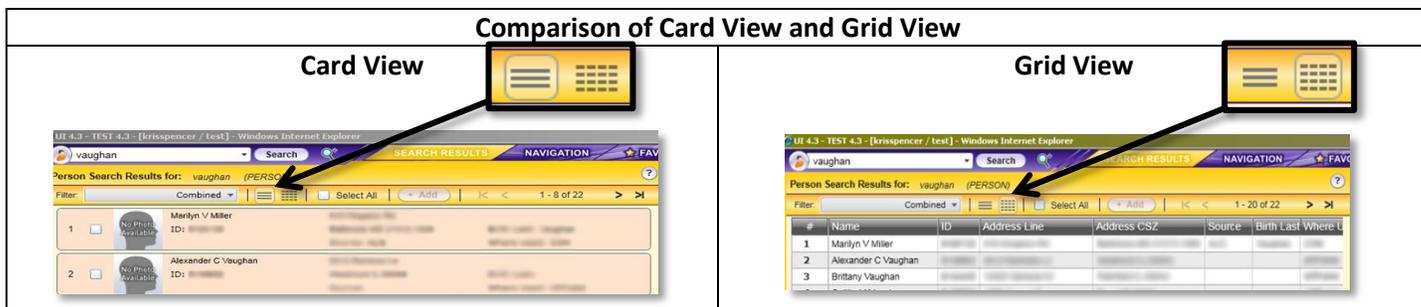
- Click **Search**.

Use Shortcuts to Copy/Paste

You can cut, copy or paste text by selecting the it and using the standard keyboard shortcuts (Ctrl+X, Ctrl+C and Ctrl+V).

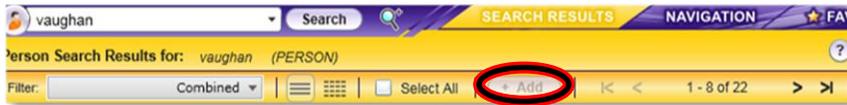
Search Results Panel Features

- Search Criteria
- Card View and Grid View (comparison table on next page)



Feature	Card View	Grid View
Photos	Displays photos of people	Does not display photos
Selecting multiple records	Click each record	Selection of multiple records by using the Shift or Control keys
Number of records displayed per page	Smaller number displayed	Larger number displayed
Sorting of records	Not sortable	Records can be sorted by clicking on column headers
Order of records	No columns	Columns can be re-ordered by dragging from right to left and dropping in place

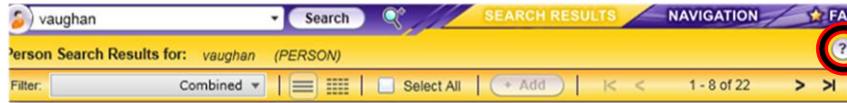
- Add a person



- Number of Search Results and navigation through results



- Search Results Help



- Hide Search Results panel



- Open selected records



The Filter



The **Filter** drop down lets you select whether you want to filter the search results by individuals, organizations or both (combined). You will only see these three options when you have a combination of people and organizations in your Search Results. Otherwise what you see depends on what you have searched for.