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User Interface 4 Navigation and Functionality

Overview

Purpose

The purpose of this document is to provide an overview of the navigation and functionality available with the Colleague User Interface (UI) 4.

Objectives

As a result of this document, you will be able to:

- Describe the structure of a UI 4 Window.
- Discuss new features available with UI 4.
- Use enhanced person and form search capabilities.
- Save forms and people to favorites.
- Change user preferences.

Optional Functionality

UI 4 provides features that are optional and may not be available at your institution. We have included references to these features but you will want to check with your Administrator to determine if they are available at your institution.

These features include:

- **Photo Display**: The ability to link student and staff photos to person records.
- **Mapping**: The ability to map addresses listed in the Context Area.
Navigation

Elements of the UI Window

Introduction

The UI Window has several new features that exist with UI 4. We have included descriptions of the key features below.

UI Window Components

The UI Window consists of the following components:

Context Area

The Context Area displays information about the person or organization you are currently working with. Each person/organization is represented by a "card". The Context Area can hold multiple person cards or organization cards at a time. Only one type of card (person or organization) can be held in a group at one time.
The Context Area contains the following buttons:

- **Mapping**: Shows a map of address(es) in Context Area (optional)
- **Add to Favorites**: Adds the current card or all cards to Person Favorites.
- **Launch Copy Window**: Launches a new browser window with the contents of the current context card which can be copied and pasted into another application.
- **Card Help**: Online help about the Card.
- **Close**: Closes one or all records in the Context Area.

The Colleague form consists of the following components
Forms and the Context Area

It is important to note that the UI Form will behave differently; depending whether or not there is a card in the Context Area.

- If there is no card in the Context Area, then the form will behave as it normally does in Colleague. That is, it will display the standard LookUp prompt(s).
- If there is a card in the Context Area, and the type of record matches the form’s initial LookUp prompt, then that record will be loaded into the form. Additional LookUp prompts may appear if that is appropriate for the particular form.
- If there is a card in the Context Area, but the type of record does not match the form’s initial LookUp prompt, then the form will behave as it ordinarily does in Colleague. That is, it will display its standard LookUp prompt(s).

Navigation Panel

It is not necessary to access a form before accessing a person in UI 4, as in previous versions but Colleague still provides the traditional menu structure within the Navigation Panel. This is accessible by clicking the Navigation tab. The Navigation Panel consists of the following components
Person Search

Introduction

Rather than selecting a Colleague form first, and then selecting the person or organization, UI 4 allows you to select the person(s) or organization(s) first, and then choose the Colleague form.

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.)
- Access the Advanced Person Search feature.

Procedure for Person Search

Follow the procedure below to perform a person search.

1. In the Search Area select Person
2. Enter your Person search criteria, such as the person’s name or Colleague ID in the search box
3. Click Search or press [Enter]

Procedure for Advanced Person Search

Follow the procedure below to perform an advanced person search.

1. In the Search Area, click the Advanced Search icon
2. In the Advanced Person Search box enter your search criteria
3. Click Submit

Search Results Panel Views

Search results are displayed on the Search Results Panel. Each record is identified with a sequence number that may be selected using the Select # field at the bottom of the panel.
## Search Result Options

- **Card View**
- **Select**
- **Grid View**

### Card View

<table>
<thead>
<tr>
<th>#</th>
<th>Name</th>
<th>Address</th>
<th>DOB</th>
<th>Birth Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Jamie Brown-Smith</td>
<td>4365 Big Horn Wy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Christopher J Smith</td>
<td>7522 Live Oak Blvd</td>
<td></td>
<td>2018</td>
</tr>
<tr>
<td>3</td>
<td>Joe Smith</td>
<td>9000096</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Joseph Smith</td>
<td>0001294</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**# of Records**

**Page Results**

**Select Card**

San Jose Evergreen Community College
Grid View

<table>
<thead>
<tr>
<th>#</th>
<th>Name</th>
<th>ID</th>
<th>Social</th>
<th>Address Line</th>
<th>Address CISZ</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Jamie Brown-Smith</td>
<td>0001318</td>
<td>307-24-0376</td>
<td>4306 Big Horn Wy</td>
<td>Cheyenne WY 82001</td>
<td>ALU</td>
</tr>
<tr>
<td>2</td>
<td>Christopher J Smith</td>
<td>0003501</td>
<td>238-01-0004-1</td>
<td>7822 Live Oak Blvd</td>
<td>Wayne PA 19019</td>
<td>STU</td>
</tr>
<tr>
<td>3</td>
<td>Joe Smith</td>
<td>0003096</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Joe Smith</td>
<td>000397</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Joseph Smith</td>
<td>0001294</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>M. Kriston Smith</td>
<td>0000036</td>
<td></td>
<td>4375 Patmores C1</td>
<td>Fairfax VA 22033</td>
<td>STA</td>
</tr>
<tr>
<td>7</td>
<td>Mike Smith</td>
<td>0000650</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Peter Alan Smith</td>
<td>0000595</td>
<td></td>
<td>PO Box 68645</td>
<td>Minneapolis MN 55450</td>
<td>CNT</td>
</tr>
<tr>
<td>9</td>
<td>The Dude Smithbillz</td>
<td>0003020</td>
<td>238-01-0016</td>
<td>14424 Metric Blvd</td>
<td>Austin TX 78727, UNITED STATES</td>
<td>ALU</td>
</tr>
<tr>
<td>10</td>
<td>Sally Smithen</td>
<td>0000334</td>
<td></td>
<td>4642 Oak St</td>
<td>Wayne PA 19019</td>
<td>SPO</td>
</tr>
<tr>
<td>11</td>
<td>Frank Smithson</td>
<td>0001273</td>
<td></td>
<td>9817 Friend Ave</td>
<td>Holton MT 59001</td>
<td>ALU</td>
</tr>
<tr>
<td>12</td>
<td>Robert Smithson</td>
<td>0000209</td>
<td></td>
<td>203 Hallax Rd.</td>
<td>Shakers Heights OH 44135</td>
<td></td>
</tr>
</tbody>
</table>

Click on Column Headers to Sort Results

# of Results

Export to Excel

Keyboard Input

Page Results

San Jose Evergreen Community College
Form Search

Introduction

The results for a Form search will be displayed on the Search Results panel. Unlike the Person search results, this view displays only in Grid View. It is important to note that if a mnemonic is entered, the form will immediately launch in the UI Form Area. Only one Colleague form may be launched at a time from the Search Results Panel.

Procedure for Form Search

1. In the Search Area select Form
2. Enter your form search criteria, such as mnemonic or title word
3. Click Search or press [Enter]

Search Results Panel View

![Form Search Results Panel](image_url)
Using Favorites

Introducion

UI 4 allows you to define People Favorites as well as Form Favorites. People Favorites and Form Favorites are displayed in separate areas within the Favorites Panel.

Adding People to Favorites

People from the Context Area can be added to Favorites by using the Add to Favorites icon (yellow star) in the Context Area. The following choices are available:

- **Add Current to Favorites.** This adds only the active person in the Context Area to Favorites.

- **Add All to Favorites.** This adds all people in the Context Area to Favorites.

Adding Forms to Favorites

A Colleague form can be added to Favorites using the Add to Favorites button (yellow star) in the upper right corner of the UI Form Area.

Opening Favorites

To open a single Person or Form, Double Click on the Person or Form

To open a folder, click on the folder; then click Open

To open Multiple People, Press [Shift] and click the people to select or press [CTRL] and click people to select; then click Open

To open People in a Form, select the people and select a form; then click Open
FAQs

How do users access application-specific forms in UI 4.0? For example, how do I access the valcodes for CORE? Is it different from the methodology of UI Desktop and UI Web?

The methodology is different. Some forms in Colleague will populate specific files in the database based on which Colleague application you are in. For example, the VAL form is defined as a UT form but is used throughout Colleague to populate Valcode tables. The Envision files naming convention is <appl>VALCODES.

To access CORE valcodes in UI Desktop or UI Web, you need to be in the CORE application and then execute VAL manually from the Quick Access box. In UI 4.0, you need to specify the application as part of the FORM search. So, if you want to access CORE valcodes, you must enter CORE-VAL (<appl>-<form>) in the FORM search.

Can I access the Toolkit from UI 4.0? Will I be able to in the future?

The Toolkit is NOT ACCESSIBLE from UI 4.0. If you attempt to access ANY toolkit form in UI 4.0 you will receive the message: “Sorry, no forms matched the provided criteria.” If you search on TOOL-<form mnemonic> (i.e. TOOL-CPKG), you will receive the message: “TOOL forms cannot be launched from UI 4.0”.

But there are some Release System tasks that are not in Studio and for the time being will remain Envision processes. These are forms used with Colleague Studio to view and manage customizations to Colleague.

These forms will be migrated to UT, with a target date of Q1, 2010. The forms will retain their mnemonics, so that as they move, they will appear the same and be available from UI 4.0.