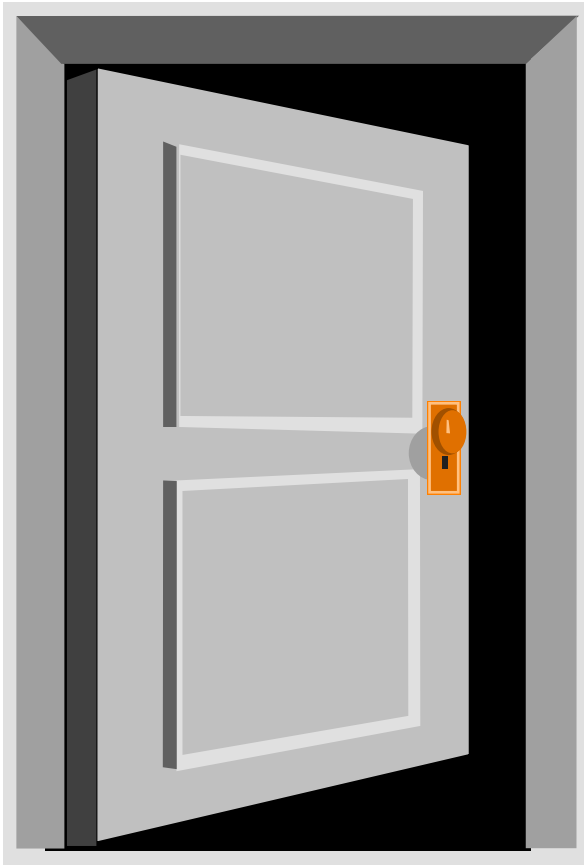


# Introduction to Colleague



- Step through this door and
- learn how to use the
- San Jose/Evergreen Community College District's
- database system -
- **Datatel Colleague**

# Created by:

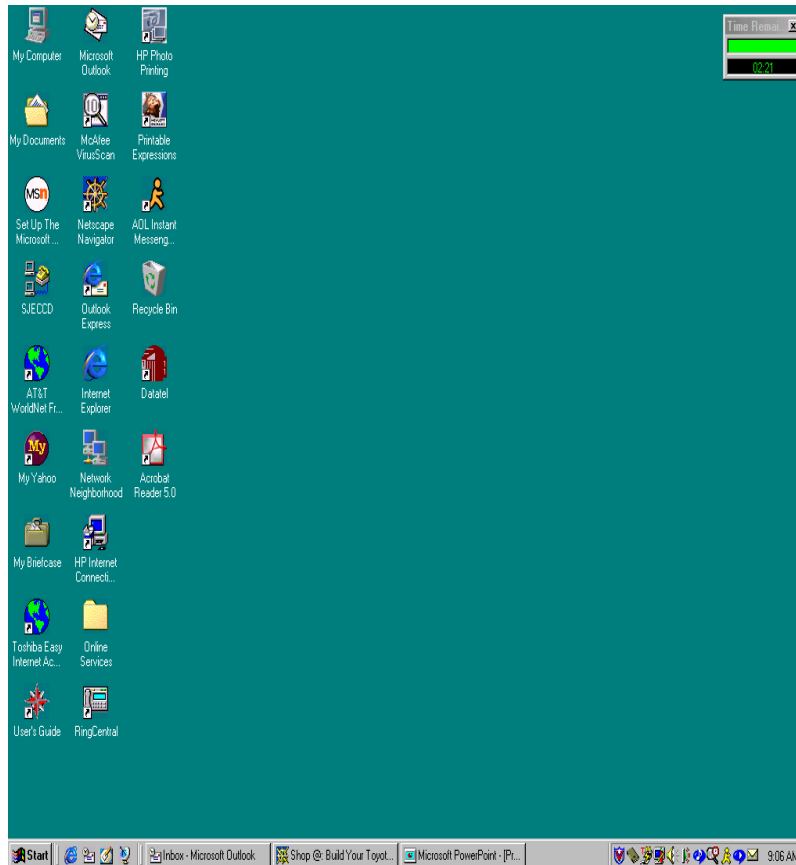
- Linda Harris
- Former Colleague User  
Operations Manager
- Edited by:
- Dan Hawkins
- Systems Administrator
- June 13, 2005



# General Definitions

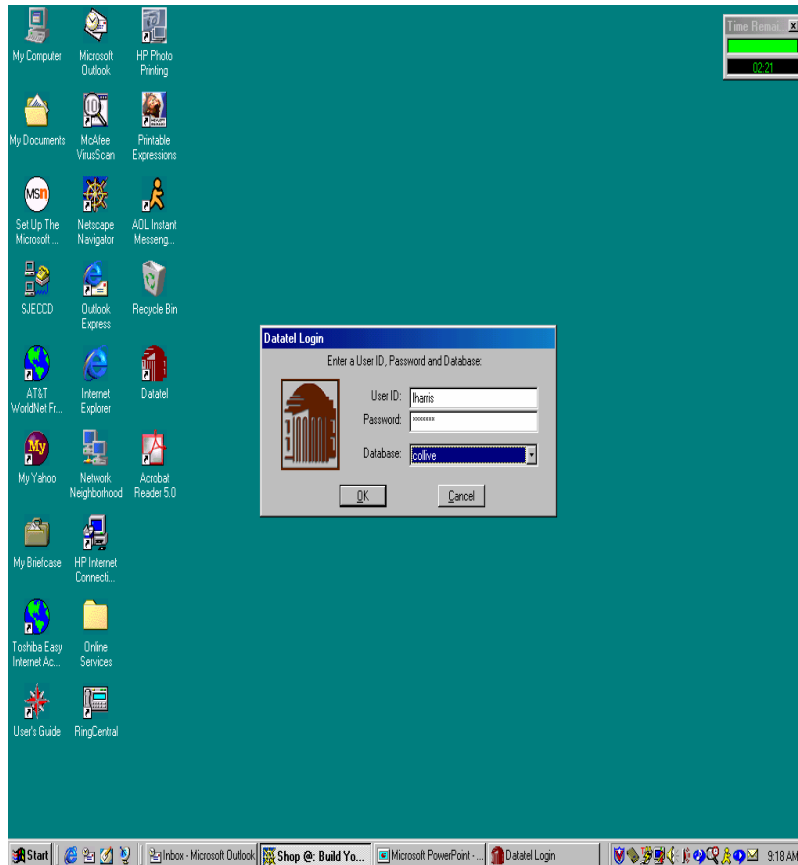
- 1. Datatel - The name of the company that has designed the SJECCD integrated software system.
- 2. Colleague - The name of the software package designed for the educational environment in Datatel.
- 3. Core - Core is a Colleague System. It is made up of four significant components and has several benefits:
  - Four components of Core:
    - 1. Demographic Data
    - 2. Shared Data
    - 3. Shared Processes
    - 4. Set up and Utilities
  - Benefits:
    - 1. Data is entered once
    - 2. Everyone uses the same data
    - 3. Data is consistent
    - 4. Changes in information are immediately available across the system
    - 5. Reporting is easier because the data is always up to date, data entry is consistent and all the information is coming from one source.
- 4. Drill (or Detail) Down - Colleague allows users to detail down to other screens from the first screen. Also allows users to detail into other data pertaining to the record without having to save or exit and type in new mnemonic.

# Datatel Icon



- Step 1...
- 1. Your computer must have the Datatel Icon appearing on your computer. If you do not have this Icon, contact your Media Services Office.
- 2. Click on the Datatel Icon (little red house)
- 3. Depending upon the pc operating system, the Datatel icon may not appear on the desktop.

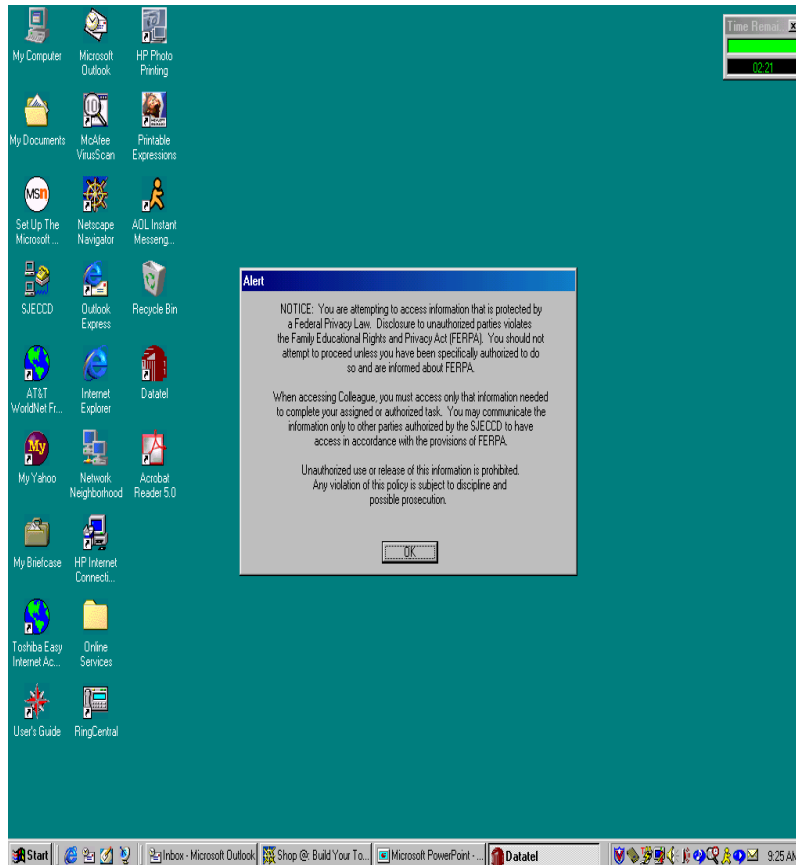
# Log on to Live



- Step 2 (Live) ...
  - 1. ITSS will email you with a User ID and Password.
  - 2. Use your ITSS assigned sign on to log on in to the Live system.
  - 2. Type in:
    - User ID = udenresr
    - Password = \*\*\*\*\*
    - Database = Collive
      - Click OK
- (Note: User ID and Password **is** case sensitive. Type in exactly as it was given to you by ITSS)

# FERPA Notice

(Federal Education Rights and Privacy Act)



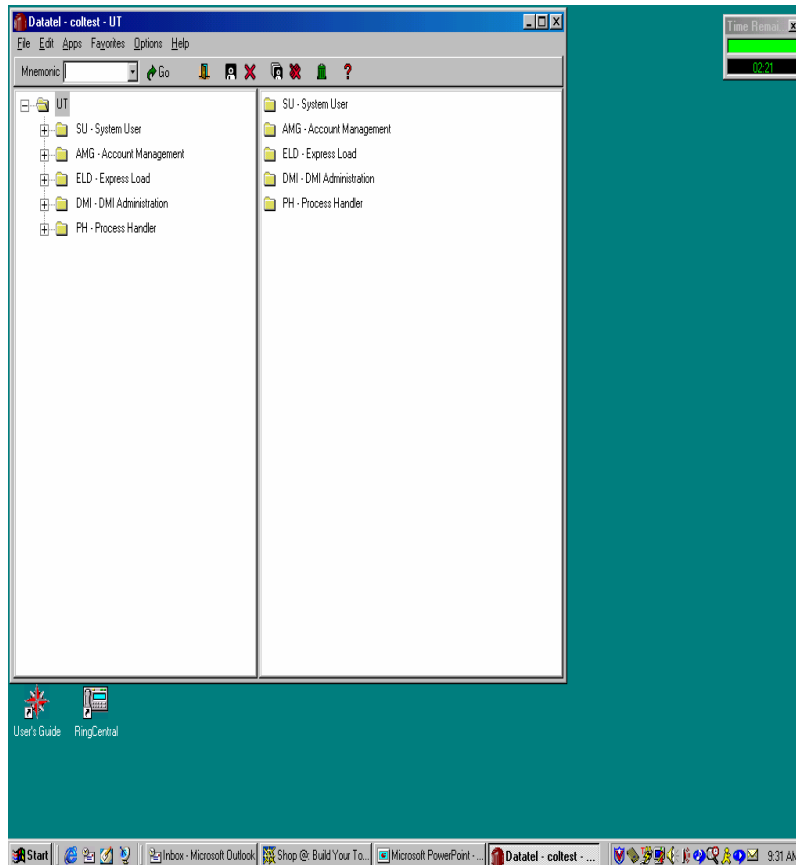
- Step 3...
- 1. Upon logging on in the Student System (ST), a FERPA Notice will appear on screen.
- 2. Read this statement. If you agree to conditions of statement to uphold the rights and privacy of student records, click
  - OK.

# FERPA NOTICE

- Notice: You are attempting to access information that is protected by a Federal Privacy Law. Disclosure to unauthorized parties violates the Family Educational Rights and Privacy Act (FERPA). You should not attempt to proceed unless you have been specifically authorized to do so and are informed about FERPA.
- When accessing Colleague, you must access only that information needed to complete your assigned or authorized task. You may communicate the access in accordance with the provisions of FERPA..
- Unauthorized use or release of this information is prohibited. Any violation of this policy is subject to discipline and possible prosecution.

OK

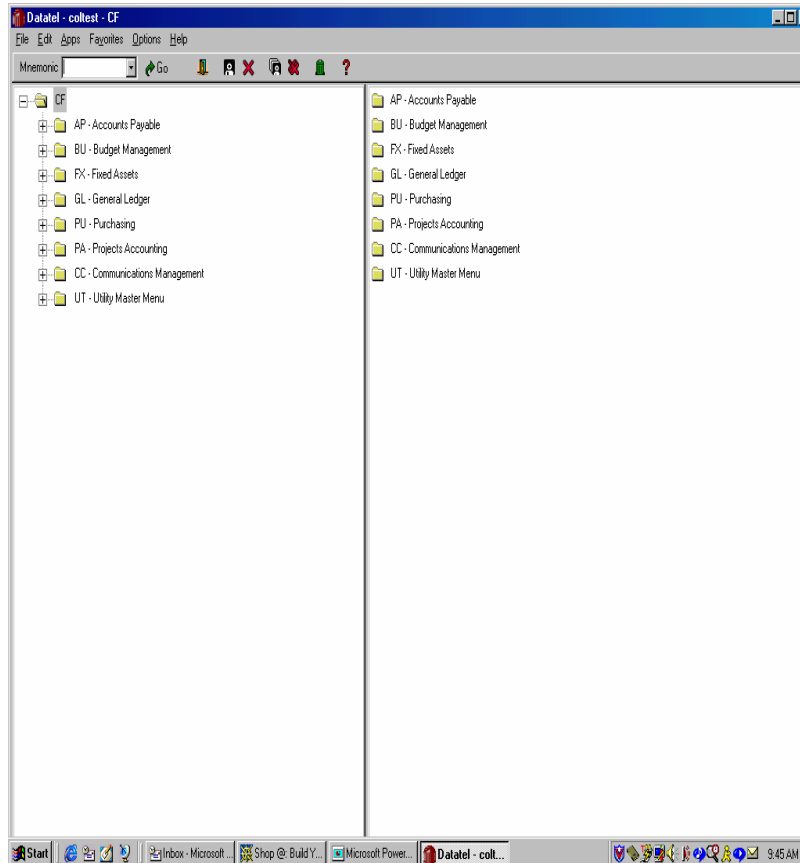
# Colleague Applications



- Step 4 ...
- 1. The first time you log on to Colleague, you will automatically be placed in the UT (utilities) application. This application is used by ITSS, not most users. You will need to change this application to either ST or CF, depending upon the access you have been granted.

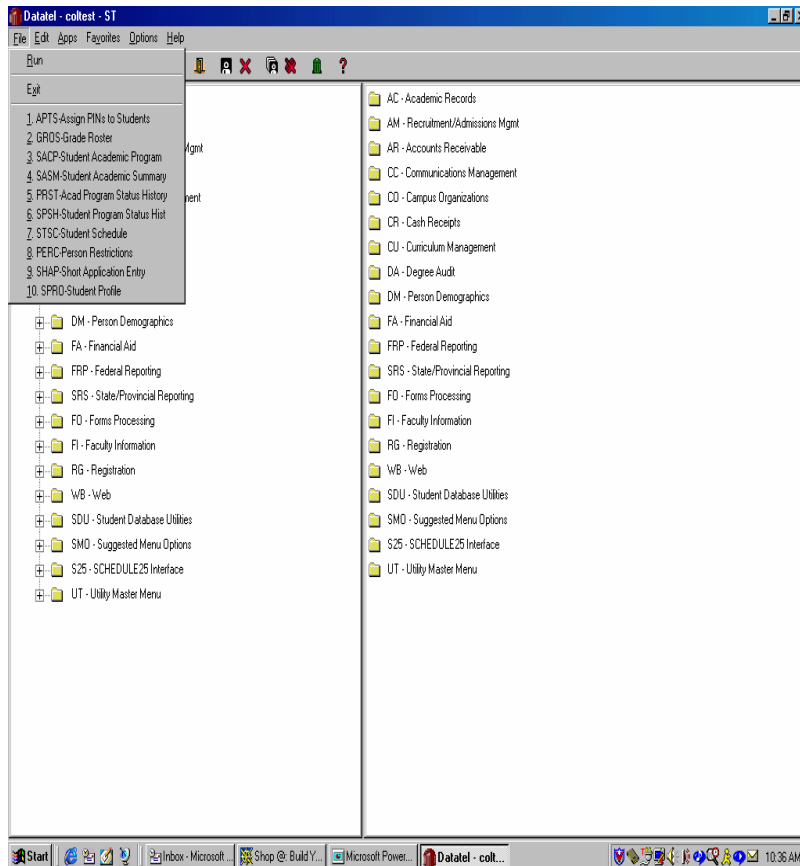


# Actions in Colleague



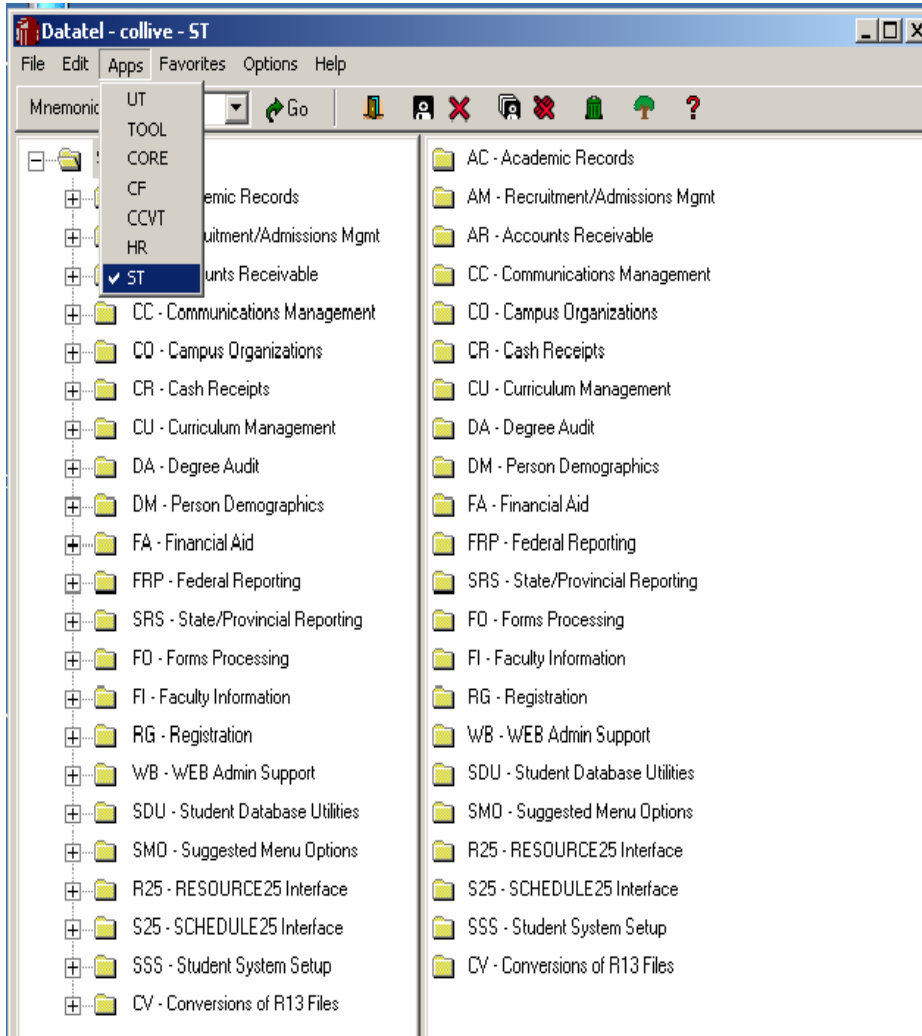
- Step 7 ...
- 1. There are symbols at the top of each screen that represent action responses in Colleague.
- 2. Refer to the next page for definitions.

# What is a “File”



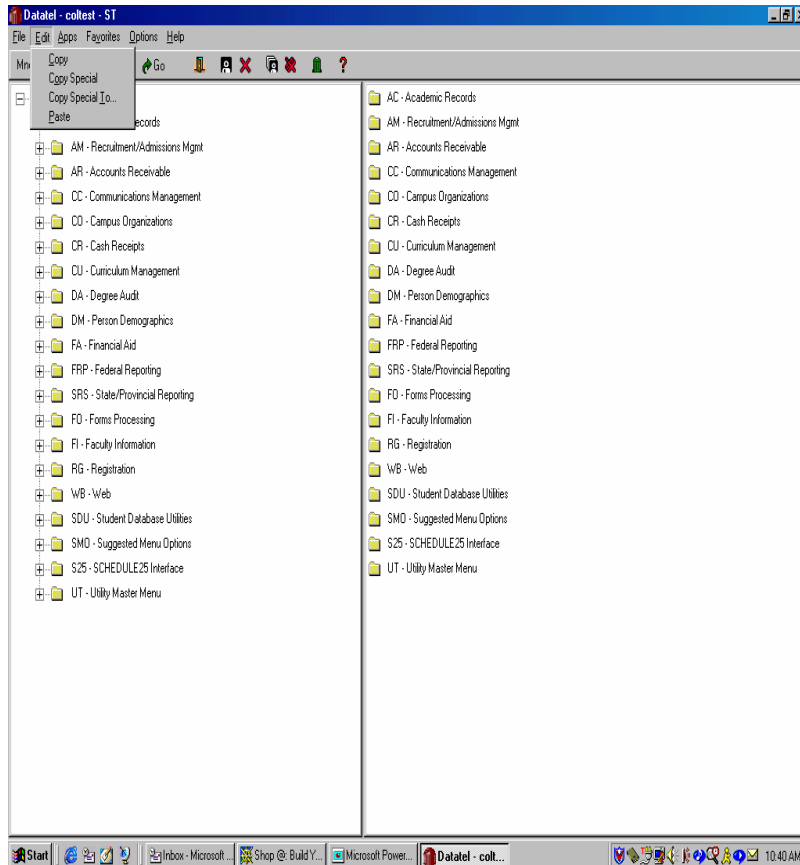
- File
- This is an alternative way for look up.
- 1. Use to access a Mnemonic by clicking “run” and typing in the Mnemonic.
- 2. Use to Exit the system.
- 3. Use to reference last 10 Mnemonics recently used. (Very similar to Word)

# What is “APPS”



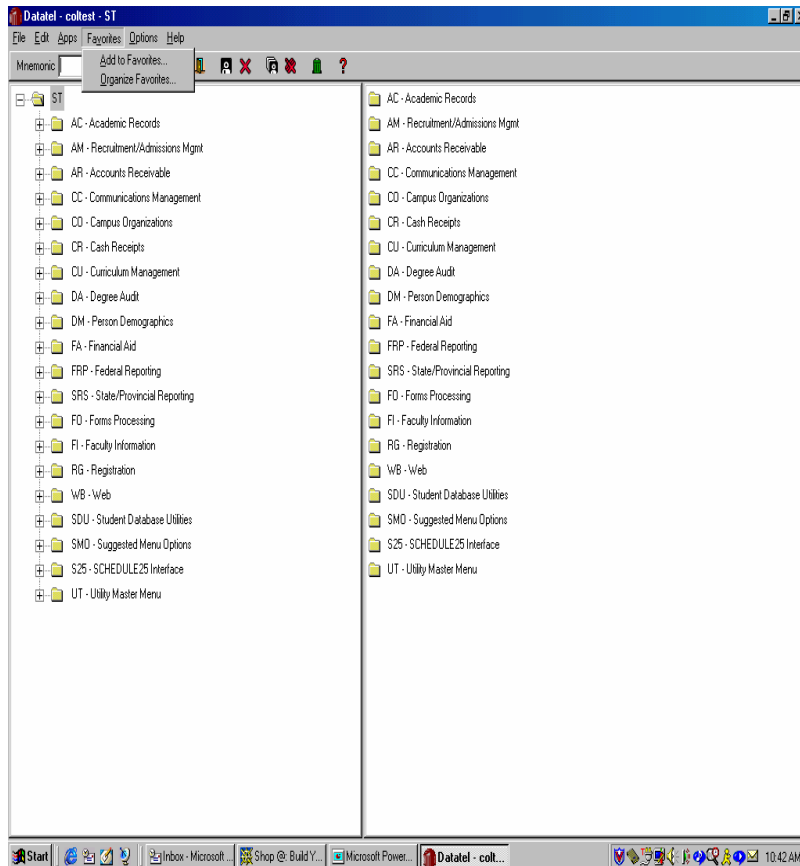
- APPS
- Select this feature to change from one module to another
- 1. Check  here to change from one application (module) to another.
- 2. Each new log on to the system, the last application referenced will appear on the screen.
- 3. This feature only needs to be changed, if referencing another module.

# What is “Edit”



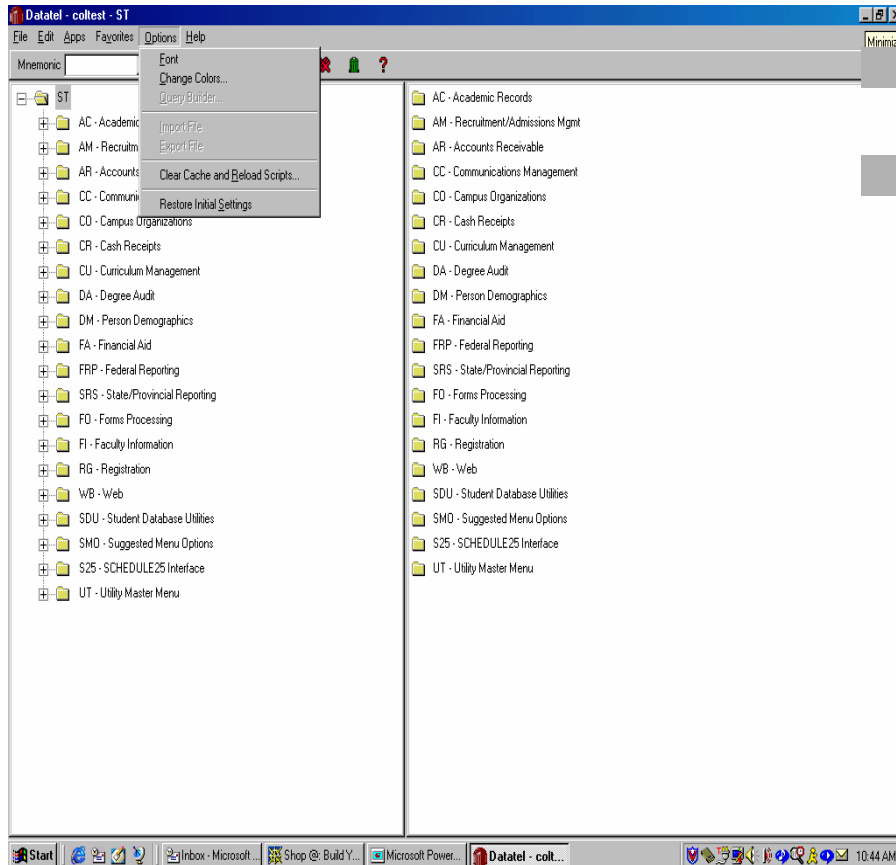
- Edit
- Edit can be used to copy and paste in reporting. Not recommended for or used by basics users.

# What is “Favorites”



- Favorites
- Favorite folders in Colleague...for offices with common workflow...but not often used(Similar to word)

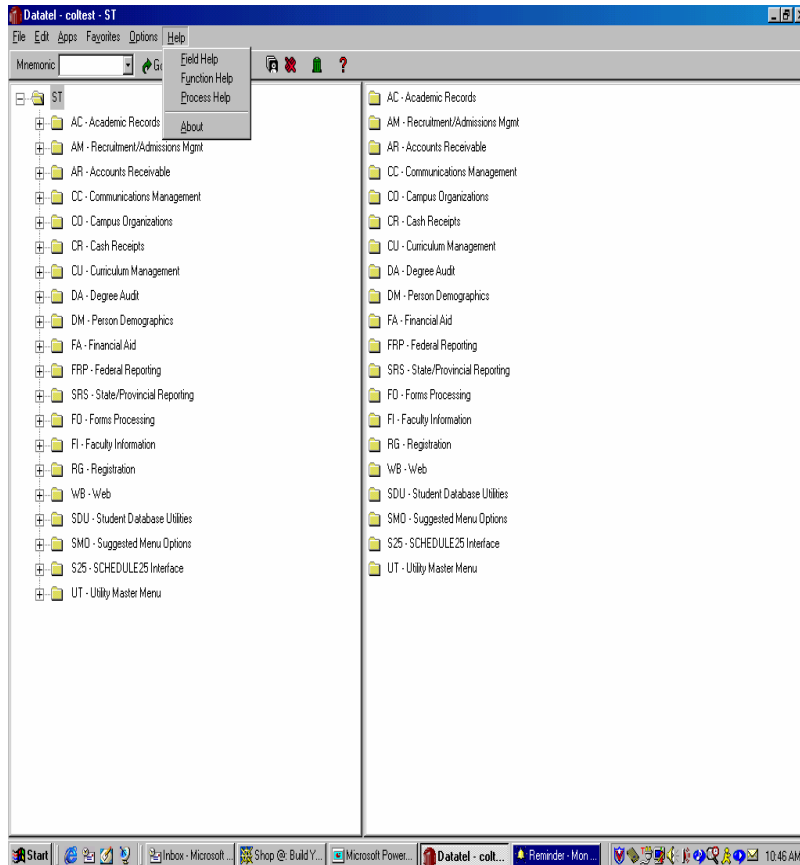
# What is “Options”



## Options

It is not recommended by Datatel to use Options.

# What kind of “Help” is there?



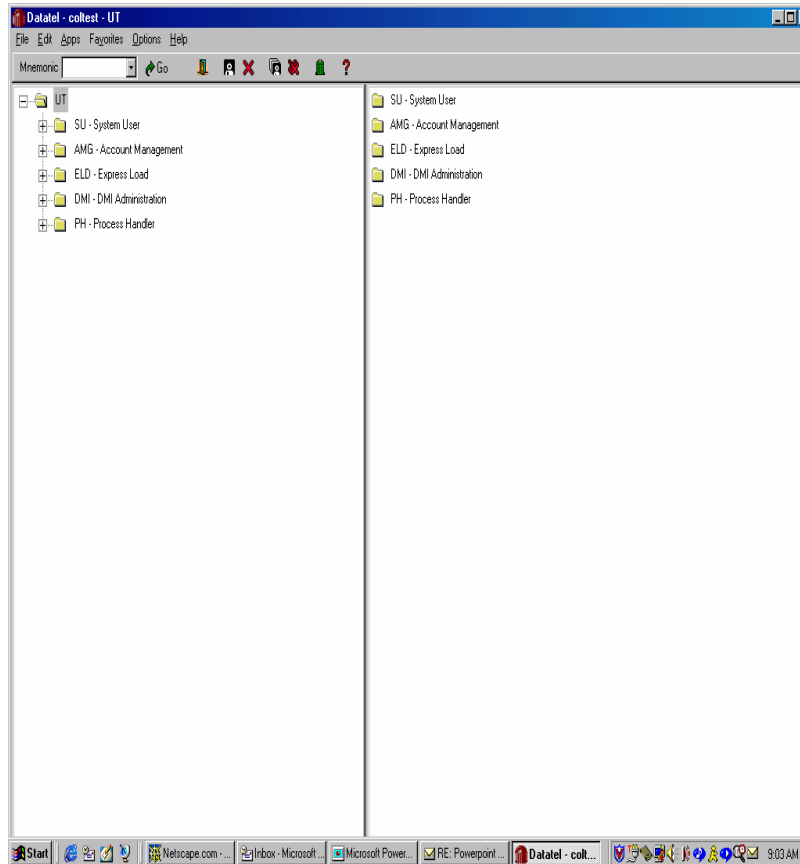
## ■ Help

■ The Help function is designed on line help and definitions for:

- 1. Field - help on a particular field.
- 2. Function - help on function keys available in Colleague.
- 3. Process - Explains the purpose of the screen and how to use it.

■ Recommended to use!

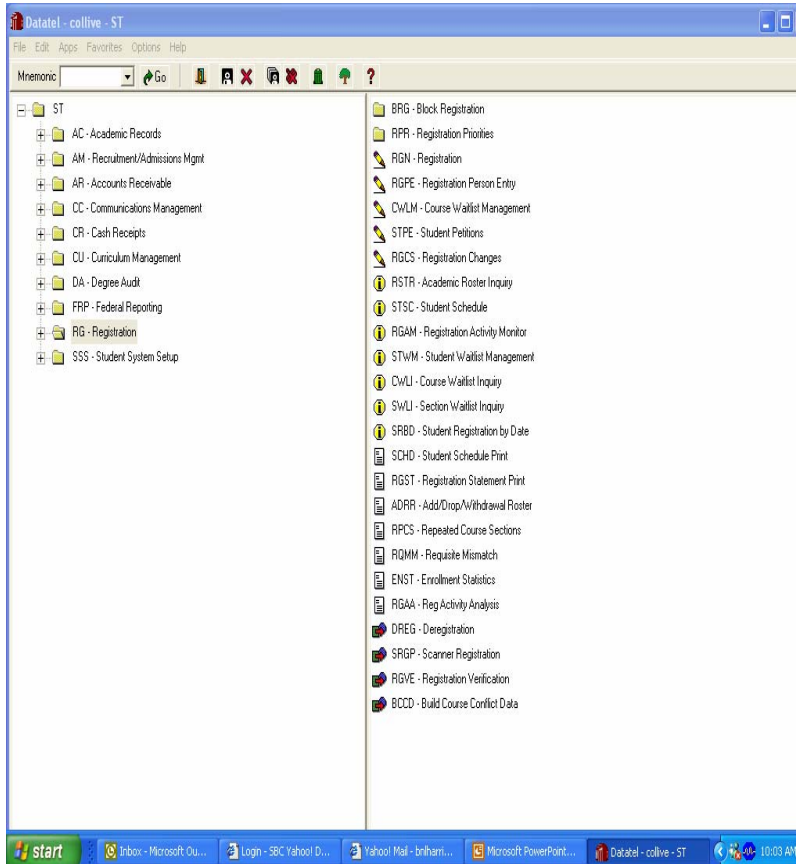
# Symbol Definitions



- 1. **Mnemonic** - The name Colleague uses to identify screen look up. Usually 3 or 4 characters in length and, generally, smart coded.
- 2. **Go** - Click on “Go” to access the Mnemonic selected.
- 3. **Open Door** - This is the EXIT door. Click on this symbol to quickly exit the Colleague system. It is an automatic log off. Use caution when using this symbol, as all input entered and not saved, will be lost.
- 4. **Disk** (single) - Click to **save** data entry for one screen at a time.
- 5. **X** (single) - Click to **cancel** one screen at a time.
- 6. **Disk** (Multiple) Click to save data entry for more than one drill down mode.
- 7. **XX** (Multiple) - Click to cancel more than one screen in the drill down mode.
- 8. **Trash Can** - Use to delete a record. Not used by most users. Use with caution.
- 9. **?** - Help button. Click on this symbol to view any helpful hints and/or definition regarding a particular screen, field or process.

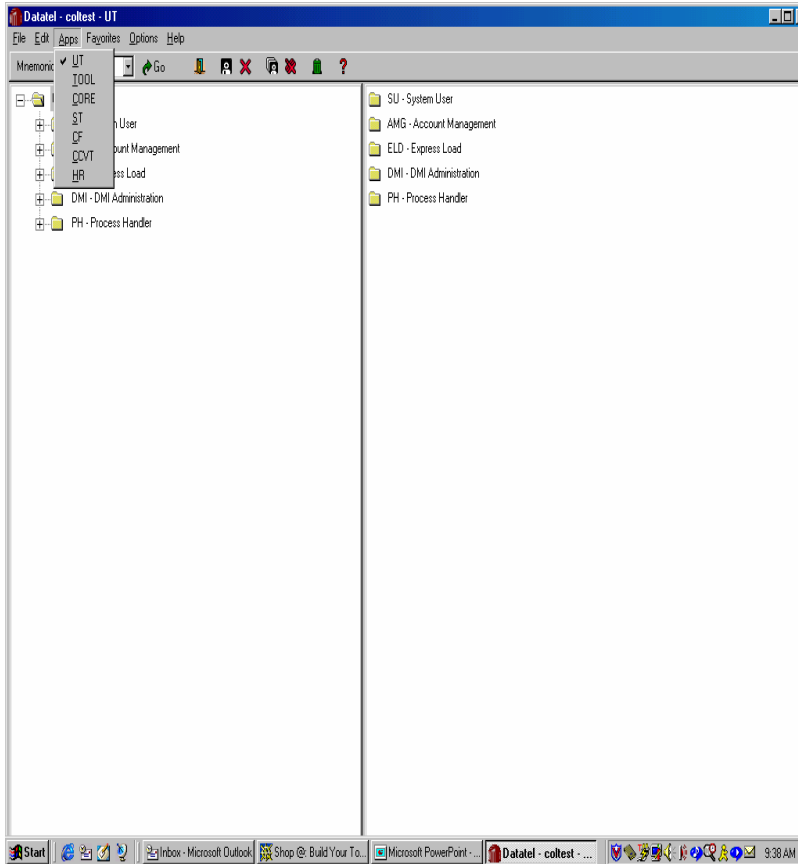


# Folder Symbols



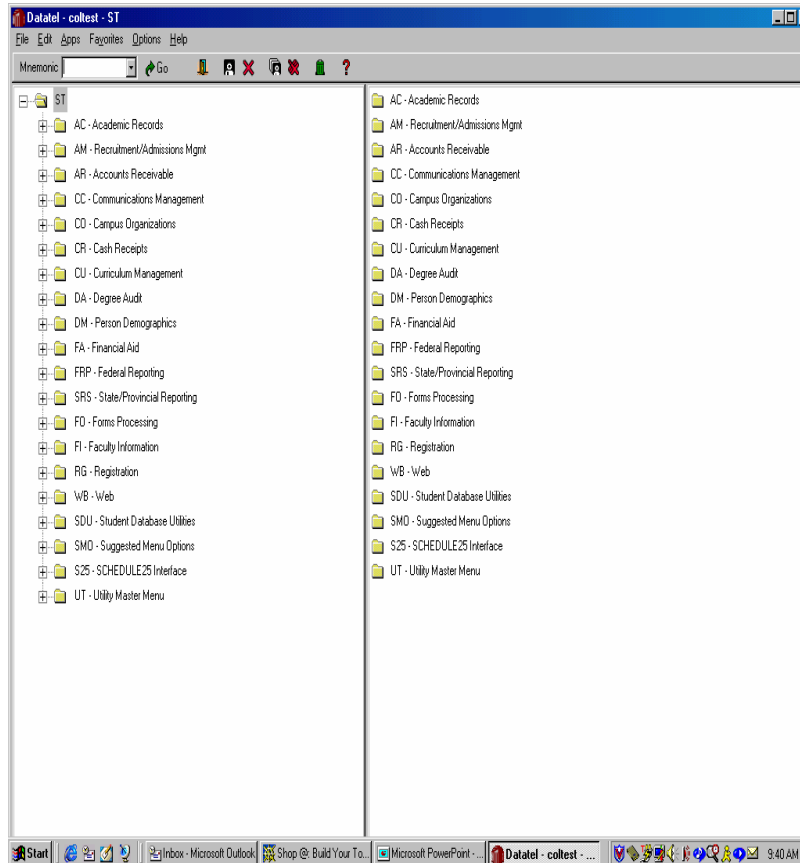
- 1. Pencil - Represents mnemonics with updating capability.
- 2. Yellow Stop Sign - Represents mnemonics with inquiry to view data but not update.
- 3. White Paper - Represents mnemonics that will create and print reports and/or data out of Colleague.
- 4. Arrow - Represents mnemonics that process data, usually in a batch mode.

# Change Application



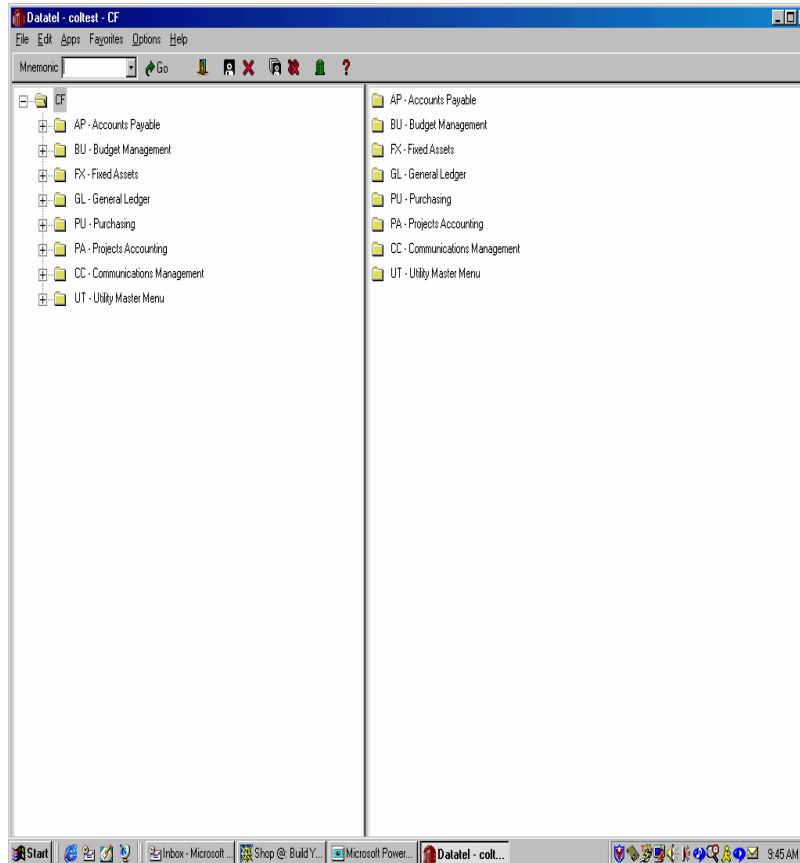
- Step 5...
- 1. Go in to Apps and change to:
  - ST = Student
  - CF = Colleague Financials

# ST (Student) Application



- Step 6 (ST) ...
- 1. Once in ST application, click on folder to open.
- 2. Example:
  - AC = Academic Records
  - When you click to open AC, you will view all mnemonics available to you in Academic Records.

# CF (Colleague Financials) Application



- Step 6 (CF) ...
- 1. This is the Financials application and will give you access to purchasing and budget information.

# Colleague ID and Password

- Upon completion of the Introduction to Colleague class, users will be assigned the following:
  - 1. User ID
  - 2. Colleague Password
  - 3. Security Classification for Colleague access
- Please note that this information is confidential, unique to the user based upon the users job assignment, and is not to be shared with others. Sharing this information will be considered a violation of the Federal Education Rights and Privacy Act.

# Who to contact for individual module training?

- In General:

Student Records @ (Counselor's Module)	<u>DO</u> ITSSWEB	<u>EVC</u> V. Ruiz H. Gipson	<u>SJCC</u> S. Gonzalez
Purchasing @	P. Graham	E. Raby	M. Fuqua
Financials@	M. Renzi	P. Lam	M. Fuqua

- \* There may be other individuals assigned to provide this training in accordance to individual offices. The people identified above can be contacted for an introduction to these other individuals.