Colleague UI 5 User Manual

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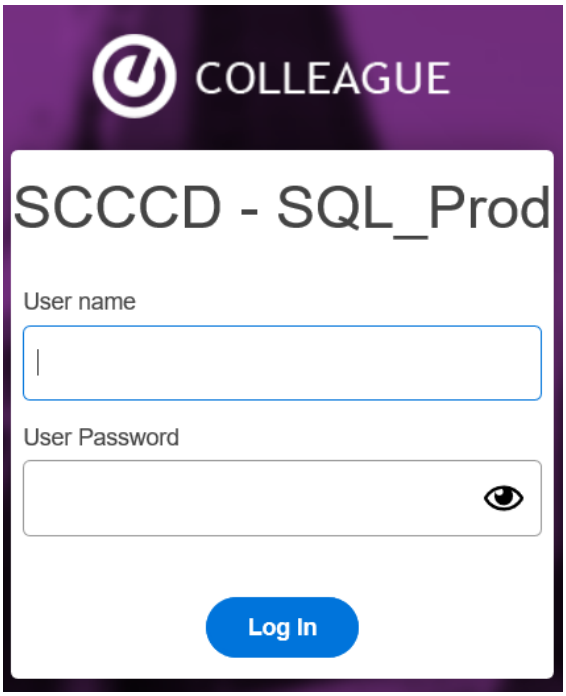
What is Colleague?

Colleague is the software used by entities within the State Center Community College District to manage and maintain data in support of academic and business practices. Users of Colleague include Admissions & Records, Financial Aid, Student Life, Business Office, Human Resources, Payroll, Information Systems, and Purchasing. Data in Colleague is maintained through the use of the Colleague User Interface and is entered in real-time. This ensures that anyone accessing Colleague is presented with the most recent information. The information in Colleague is shared through WebAdvisor, Self-Service, Ellucian Mobile, and other applications needing access to real-time institutional information.

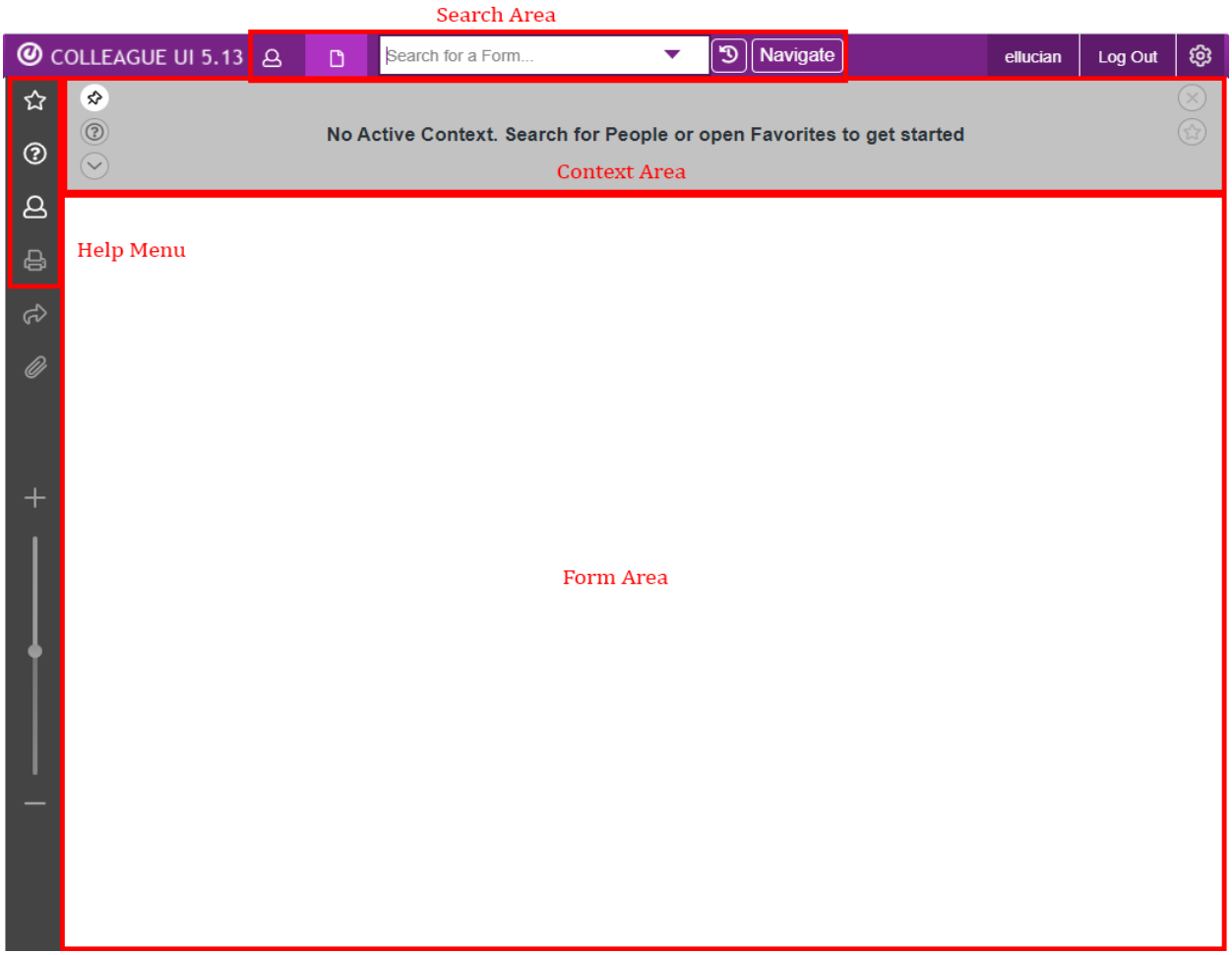
Accessing the Colleague User Interface (UI)



The Colleague User Interface is accessed through the App within the SCCCD portal. The current version of the Colleague User Interface (UI) at SCCCD is 5.13. Since it is written in industry standard HTML5, Colleague can be accessed by modern browsers including Google Chrome, Mozilla Firefox, Safari, Internet Explorer, and Microsoft Edge. You must be on the SCCCD network to access Colleague.

Navigating the Colleague UI

The Colleague user interface contains four main areas you will interact with: the **Search Area**, the **Context Area**, the **Form Area**, and the **Help Menu.**



The Search Area is where you will find people or forms to lookup information.

The Context Area is where the person record you are working with is held.

The Form Area is where you will interact with information for the person in the context record.

The Help Menu is where you will find resources to help you understand and interact with the Colleague system.

The Context Area

The **Context Area** is where Person information is displayed. It is populated by using **Person Search** or as part of loading a Colleague form. One or more Person records can be held in context if you need to access multiple forms for a group of person records. Think of the **Context Area** like a deck of cards. Every record you put in the **Context Area** can be accessed one at a time. As records are added they are put at the end of the **Context Area**.

Pin: Click this to indicate whether or not to keep the context card when saving or cancelling out of a form. The color of the pin and context card will change color to indicate the context card has been pinned in the context area. It can be helpful to pin a record in context if you need to access several forms for the same record like when onboarding an employee or when awarding financial aid to or registering a student.

Help: Access the help menu specific to the context area.

View All Cards: View all the select cards held in context area. You may switch the active card, favorite or remove a card or cards, or open a specific card.

Close Card: Close the current card in context or all cards in context area.

Add to Favorites: Add the active card or all cards held in context area to your 'Favorite People'

Previous/Next Card: Cycle through all the cards held in the context area.

The Search Area

The **Search Area** in Colleague is used for both **Person Search** and **Form Search**. Whenever you need to look something up on Colleague you will start at the **Search Area**.

Using Person Search

To find a person record in Colleague you can enter the ID number, SSN or name in the **Person Search** area and then hit 'Enter' or click the magnifying glass icon. When searching by ID number it is not necessary to include the leading zeroes. You can also use the drop-down arrow to the right of the **Person Search** area to pull up a list of recent searches.

Person Name Search - When searching by name you have several lookup options:

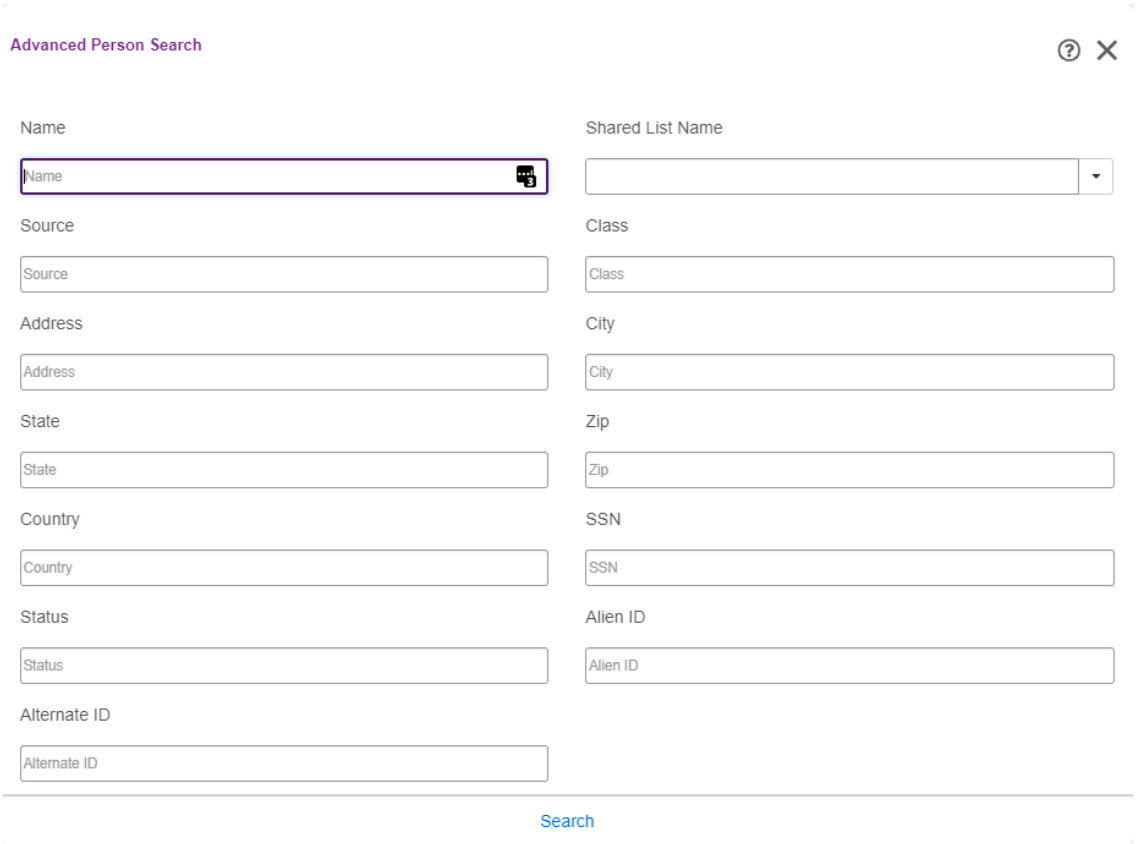
Lastname
Firstname Lastname
Lastname, Firstname
Fi La (partial first partial last)
La, Fi (partial last, partial first) ***this is the recommended search option**

Avoiding Duplicates - It is important to do a thorough search of the Colleague system before creating a new person record in order to avoid creating a duplicate record. If a duplicate record is created and mistakenly used for registration, payroll, or financial aid transmittal it can take a long time to clean up and transfer the information to the correct record in Colleague.

There are a few other ways to search Colleague using additional search fields that will help you narrow down your search and ensure that you find the person record you are looking for including **Advanced Person Search**, **Soundex Search**, **Alternate Field Search**, and **Combination Field Search**.

Advanced Person Search

An **Advanced Person Search** is performed by clicking the 'Advanced' button to the right of the **Person Search** area. With the **Advanced Person Search** feature, you can search for a person record in the system using many alternate search fields.



Soundex Search

A **Soundex Search** uses words that 'sound like' other words. If you're not sure if the person you want to find is called John, Jon, or, Jonathan you may want to use a **Soundex Search** to locate the person's record. You can perform a **Soundex Search** by using the '/' character.

For example, searching Colleague for / jon will yield results for Jon, Jonathan, John, Johnathan, and even Juan.

Using a **Soundex Search** will usually yield many results and take extra time to return those results but it can be helpful if you are trying to locate a person record in the system and aren't sure of the proper spelling of the person's name.

Alternate Field Search

You will notice that 'Birth Date' is not a searchable field on the **Advanced Person Search** form, but you can look up a person record in Colleague using only a birth date. To do this you will need to

know the database field name. The birth date in Colleague is stored in the 'BIRTH.DATE' field in the PERSON table. *(More on how to find this information in the Help menu section).*

To search Colleague for person records with a birth date of '12/07/1941' (a day that will live in infamy) you would use this search string, prefixed with a semi-colon:

;birth.date = '12/07/1941'

This will work for a 2-digit or 4-digit year.

Combination Field Search

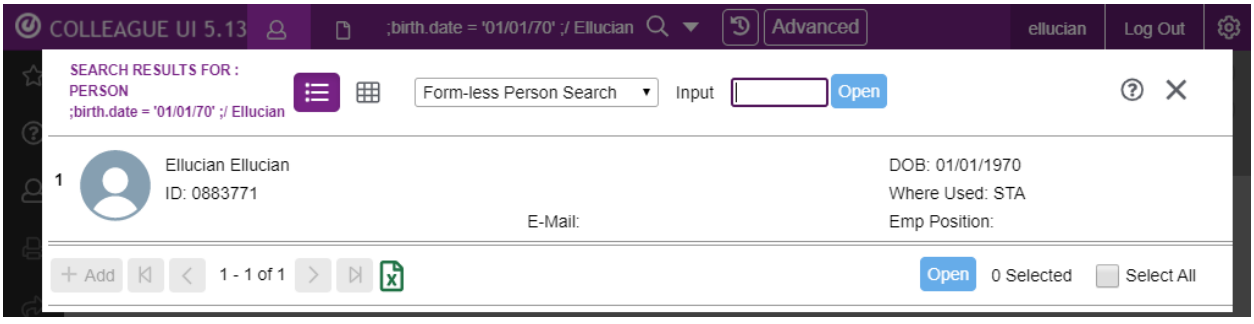
If you know a few pieces of information about a person you can combine them into the same search to narrow down your search results. Each search term will need to be prefixed with a semi-colon and separated with a space:

;birth.date = '01/01/70' ;last.name = 'Ellucian'

A **Soundex Search** can be combined with an **Alternate Field Search**:

;birth.date = '01/01/70' ;/ Ellucian

Search Results



The result of the search is displayed in the Search Results panel in either a **Card View** or **Grid View**. The search results can be selected individually, all together, or a few at a time. You can also Export the search results to Microsoft Excel.

To page through the Search Results, use the navigation icons at the bottom of the **Search Results** area:

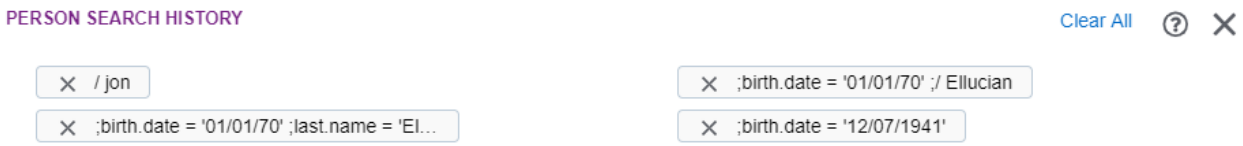
Go to beginning/prior page Go to end/next page

The search results can be exported to Microsoft Excel by clicking the Excel icon at the bottom of the Search Results area.

Person Search History

Every person you search for will be kept in your **Person Search History**. To access your form search history, click the down arrow to the right of the **Person Search** area.

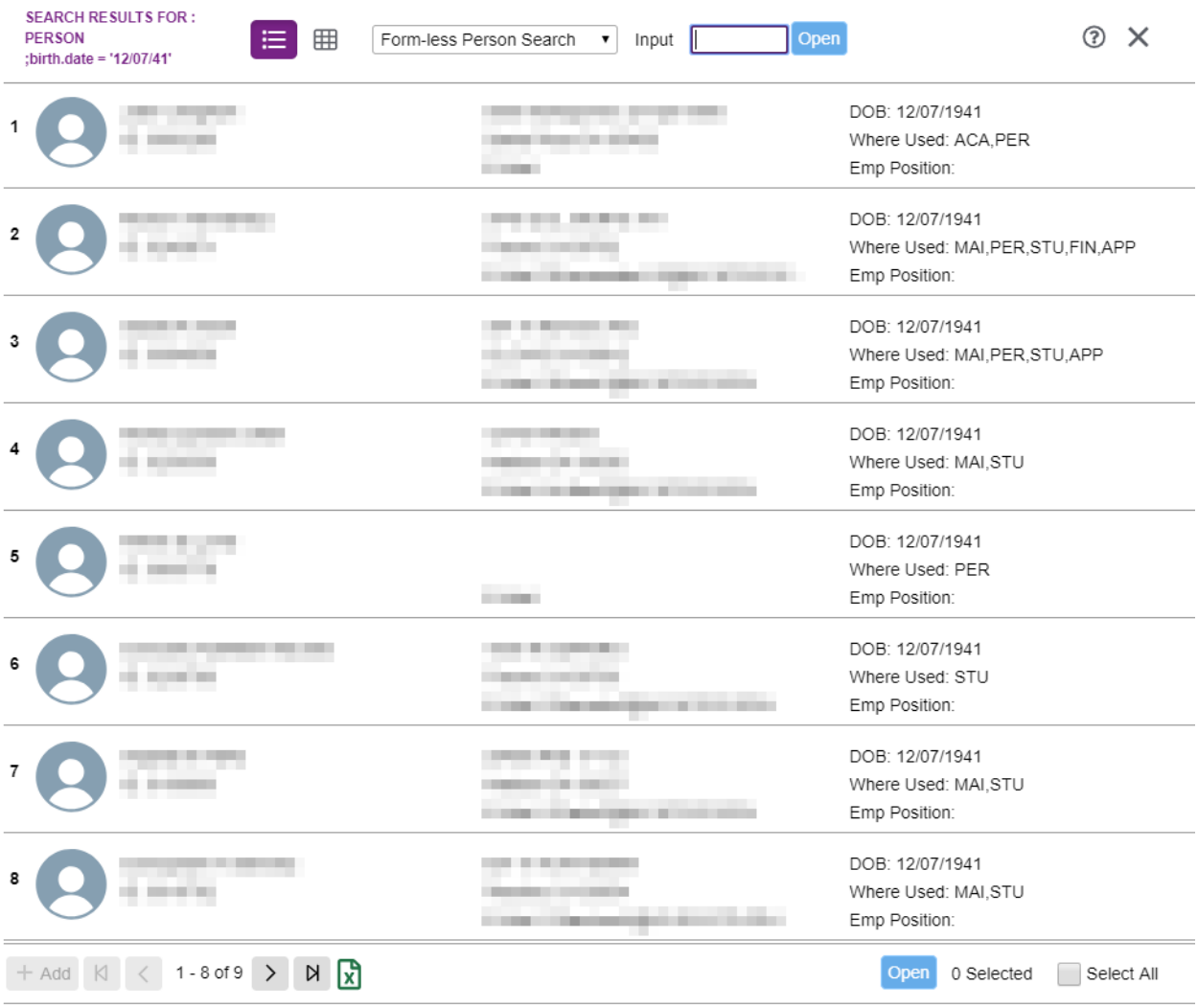
On the **Person Search History** you can choose 'Clear All' to remove all forms or just clear individual forms by clicking the 'X' next to the form mnemonic.



Clicking the large 'X' at the top right corner will close the **Person Search History**.

Card View

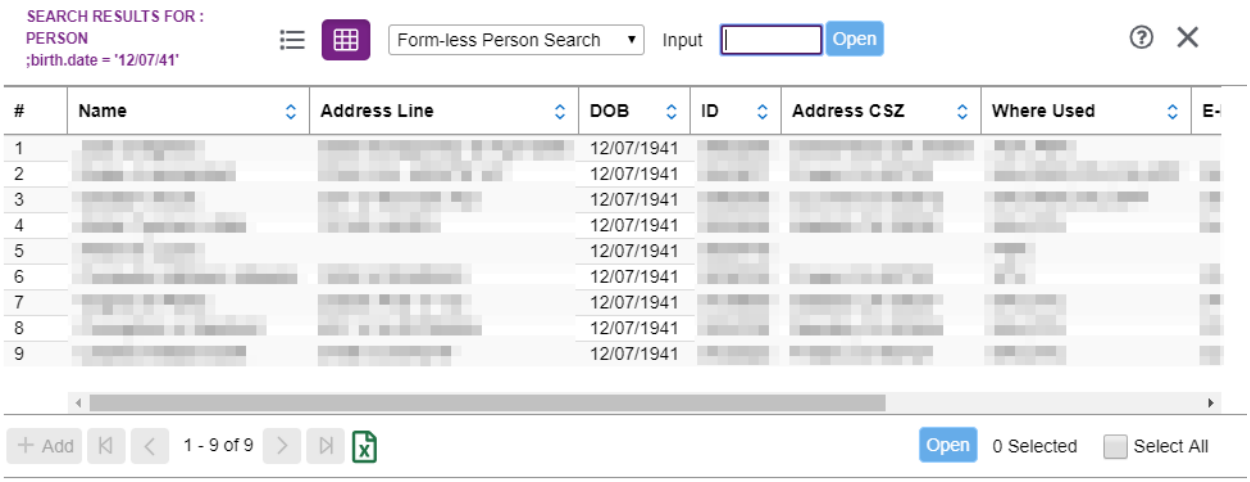
In **Card View** you can view the search results in a format that shows each person's context card information.



This view option will give you a smaller number of records per page and the results are not sortable. Columns are not able to be reordered.

Grid View

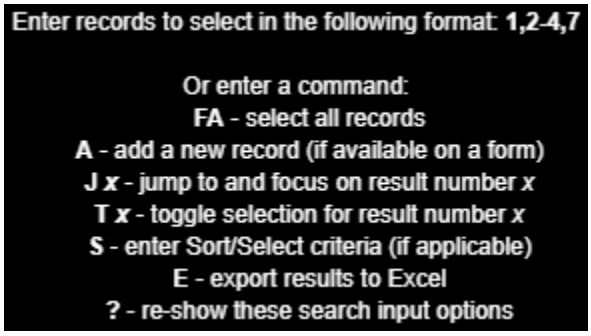
In **Grid View** the search results are displayed in a columnar view and can be sorted by any of the fields listed in the search results by clicking on the up/down arrows to the right of the field name.



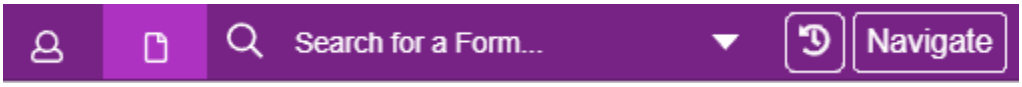
Grid View also offers the option of reordering the columns displayed on the search results page. To do this, click on the column header and drag it to the left or right.

In both **Card View** and **Grid View** you can select one or many records. To select a record, just click on it and it will become highlighted. Click the 'Open' button to open all of the selected records into the Context Area.

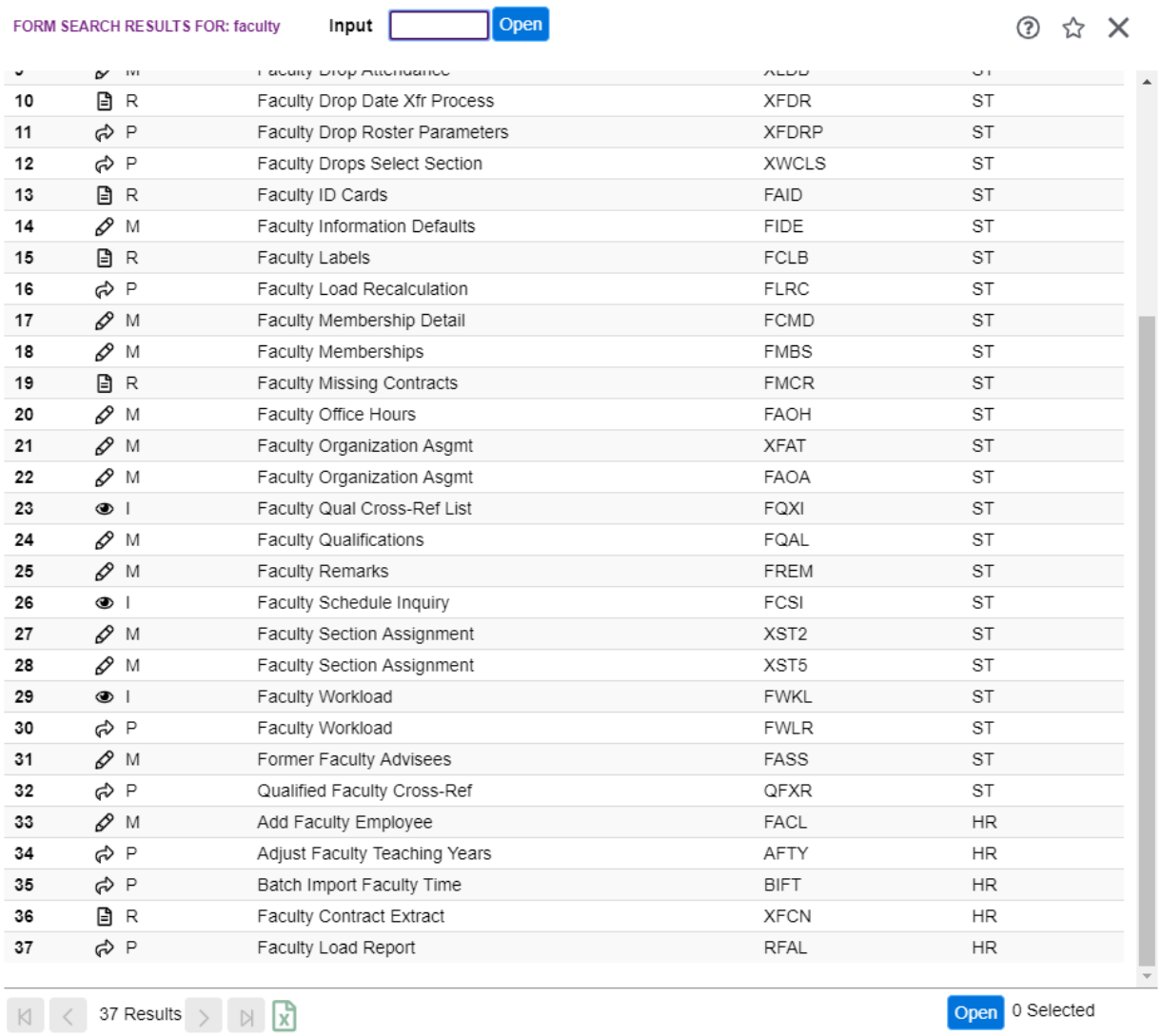
If you let your mouse hover over the 'Input' area you will see this information with a few more options for the **Search Results**:



Using Form Search



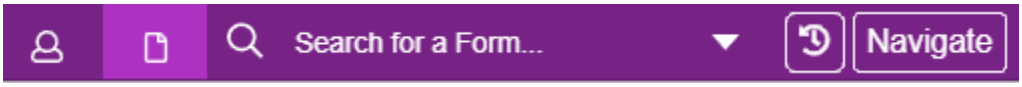
The **Form Search** in Colleague is similar to the **Person Search**. Just type the name or description of the form into the search area to get a list of forms to access or type the form mnemonic to go directly to the form. On the **Form Search Results** you can sort by Name, Mnemonic, and Application. The **Form Search Results** area also allows you to skip through the results pages and export the results to Microsoft Excel just like the **Person Search Results**.



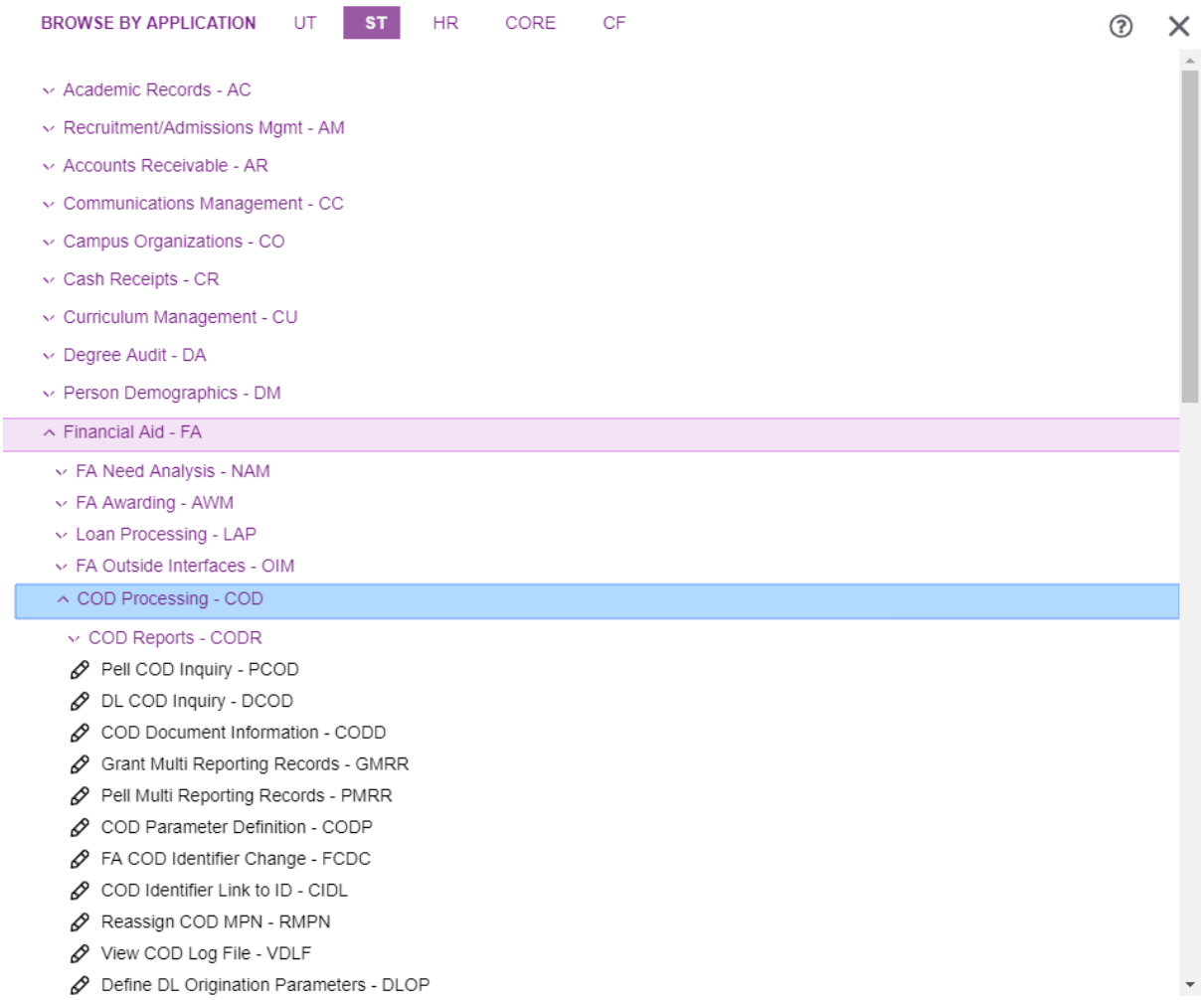
10	R	Faculty Drop Date Xfr Process	XFDR	ST
11	P	Faculty Drop Roster Parameters	XFDRP	ST
12	P	Faculty Drops Select Section	XWCLS	ST
13	R	Faculty ID Cards	FAID	ST
14	M	Faculty Information Defaults	FIDE	ST
15	R	Faculty Labels	FCLB	ST
16	P	Faculty Load Recalculation	FLRC	ST
17	M	Faculty Membership Detail	FCMD	ST
18	M	Faculty Memberships	FMBS	ST
19	R	Faculty Missing Contracts	FMCR	ST
20	M	Faculty Office Hours	FAOH	ST
21	M	Faculty Organization Asgmt	XFAT	ST
22	M	Faculty Organization Asgmt	FAOA	ST
23	I	Faculty Qual Cross-Ref List	FQXI	ST
24	M	Faculty Qualifications	FQAL	ST
25	M	Faculty Remarks	FREM	ST
26	I	Faculty Schedule Inquiry	FCSI	ST
27	M	Faculty Section Assignment	XST2	ST
28	M	Faculty Section Assignment	XST5	ST
29	I	Faculty Workload	FWKL	ST
30	P	Faculty Workload	FWLR	ST
31	M	Former Faculty Advisees	FASS	ST
32	P	Qualified Faculty Cross-Ref	QFXR	ST
33	M	Add Faculty Employee	FACL	HR
34	P	Adjust Faculty Teaching Years	AFTY	HR
35	P	Batch Import Faculty Time	BIFT	HR
36	R	Faculty Contract Extract	XFCN	HR
37	P	Faculty Load Report	RFAL	HR

Double-clicking on a form will load the form into the **Form Area** of Colleague.

Navigating the Hierarchy



Another way to access a form in Colleague is by **Navigating the Hierarchy**. You can view a list of the forms you have access to by clicking the 'Navigate' button to the right of the search bar and selecting the proper application.



Double-clicking on a form will load the form into the **Form Area** of Colleague.

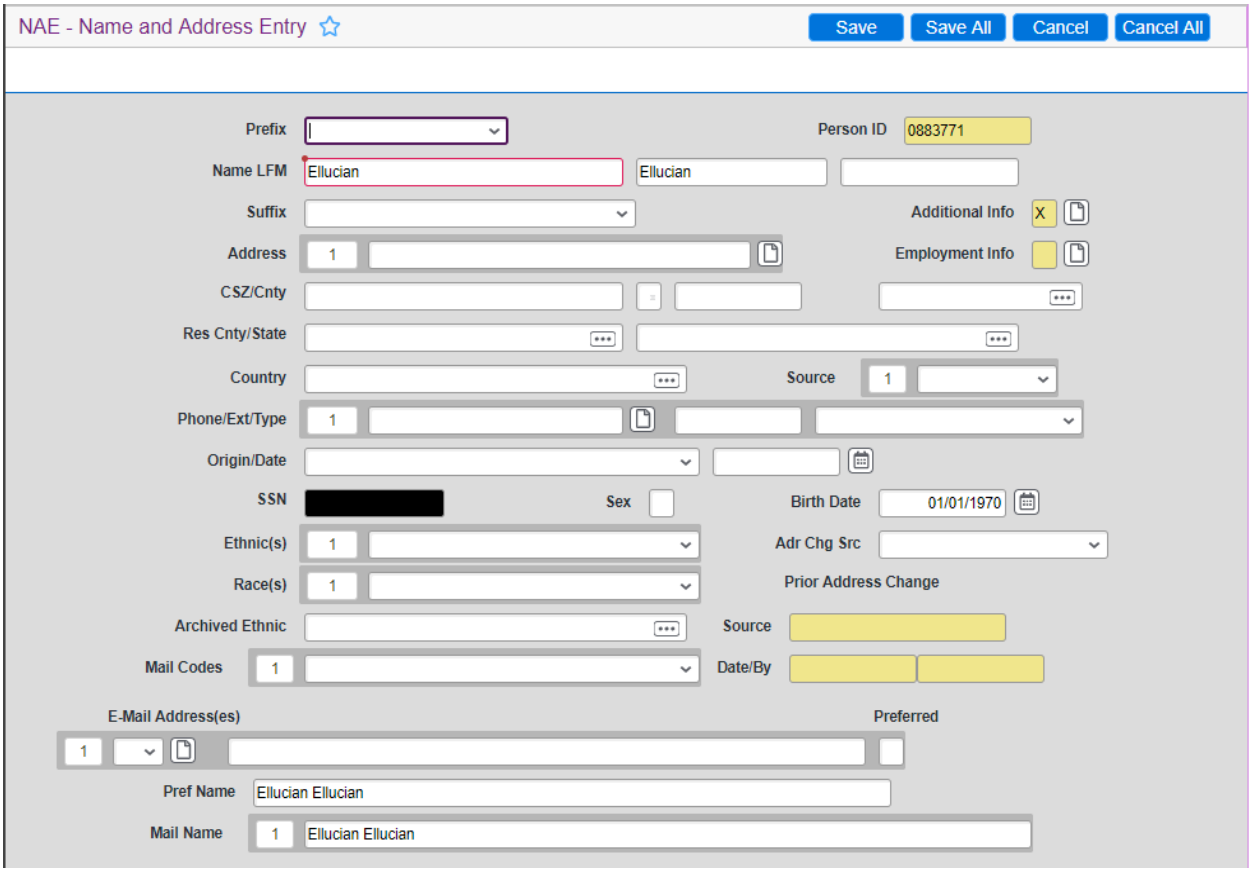
Form Search History

Like **Person Search History**, every form you access will be kept in your **Form Search History**. To access your form search history, click the down arrow to the right of the **Form Search** area.

On the **Form Search History** you have the same options available to you as the **Person Search History**.

The Form Area

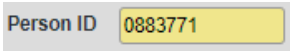
Forms in Colleague allow you to interact with the database by entering or updating information and generating reports. The form area displays the form you are currently working with. Colleague forms have several different types of data fields including **editable fields**, **inquiry fields**, **drop-down fields**, **detail fields**, **blocked fields**, and **required fields**. Some fields can even hold more than one piece of information. These are called **multi-valued fields, window group fields,** or **data tables**.



Form Field Types

Editable fields have a white background and allow data to be entered or updated in the form.

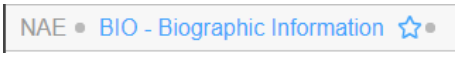
Inquiry fields have a shaded background and display information that is not editable in the form.



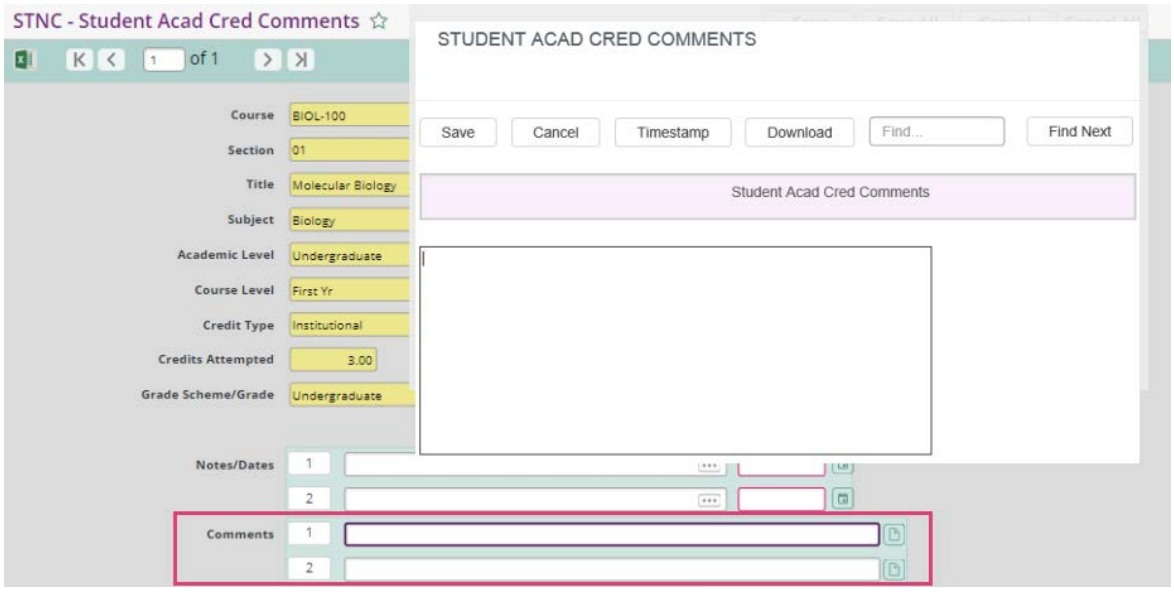
Drop-down fields (also known as validated fields) allow only specific information to be entered into the field from a dropdown list.

Detail Fields allow you to drill in to get more information for the field by connecting to another form.

If you detail into a field on a form, you will see the form name change to indicate that you have moved to another form.



Detailing on a comments field allows you to enter free-form text either by typing or pasting information. You can even timestamp and download the comments to a text file.



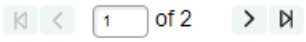
Blocked fields are blacked out to prevent data from being displayed without appropriate access.

Required fields are surrounded by a red line.

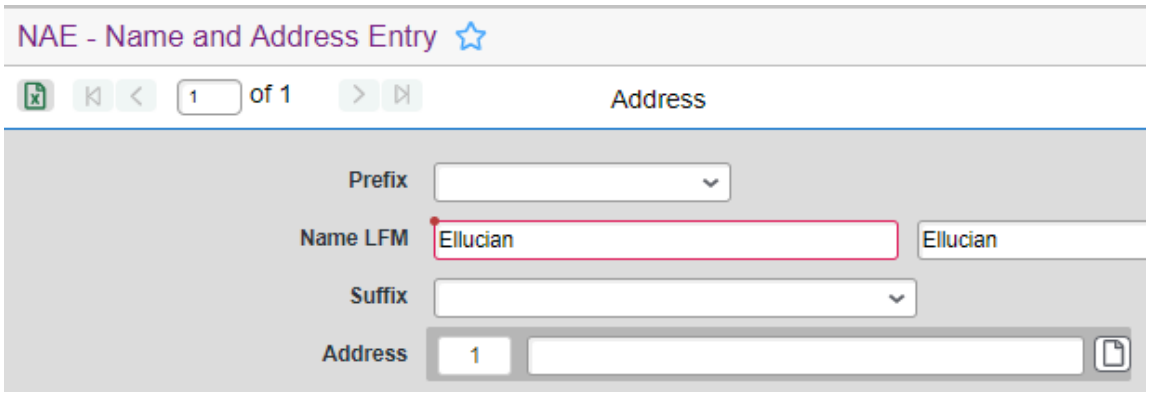
A form cannot be saved in Colleague if any required fields are left blank.

Multi-valued fields have a number beside them. Clicking the number will allow you to Insert or Delete a record form the list of values stored in the field.

Clicking into a multi-valued field will bring up the navigation buttons for that field where you can page through the field values or skip to the end or back to the beginning. It will also display the number of data values in the field.



Multi-valued fields are exportable to Microsoft Excel. If you click into a multi-valued field in a form you will notice the field name appears at the top of the form and the Excel icon appears near the top of the form to the left. Clicking this icon will allow you to export the field data if the field contains data.



You will notice as you navigate through the forms in Colleague that certain field can exhibit multiple properties. For example, you could have a field that is required, validated, and multi-valued. Pay attention to the icons next to the field and the field shading and outline colors so you know how to interact with the form field.

Depending on the type of field ion a form, you may see a **calendar icon, calculator icon**, or **lookup icon**. The **calculator** and **lookup** icons in UI 5 are new to you if you are used to UI 4.5.

The **Calendar Icon** allows you to use a popup calendar to pick a date to be entered into the form field. Using this icon ensures that the date is entered into the field in the proper format.

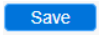
The **Calculator icon** allows a calculation to be made if the field stores a number.

The **Lookup icon** indicates that the field allows you to search for a value to be entered using ellipsis '…' to look up information.

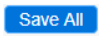
For example, if you wanted to search for all instances of 'State Center' the field allows you would use the format: (dot)(dot)(dot) State Center (dot)(dot)(dot) i.e. …State Center…

Updating Form Data

After viewing or updating information within a Colleague form, you have several options to exit the form:

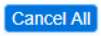


Allows any changes to the current form data to be saved and exit the form.



Allows any changes to data on every form currently open to be saved and exit the form. If you have used a form's detail button to move from that form to another form, using 'Save All' will save all the information in all the forms you have accesses in the form chain.

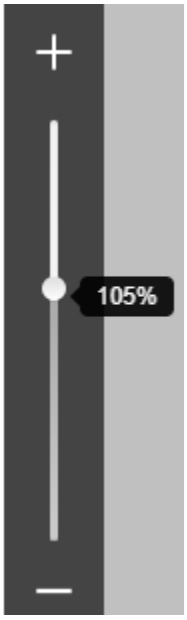
Allows any changes made on the current form to be canceled and exit the form.



Allows any changes done to every form currently open to be canceled and exit the form. If you have used a form's detail button to move from that form to another form, using 'Cancel All' will cancel all the information in all the forms you have accesses in the form chain.

Form Scaling

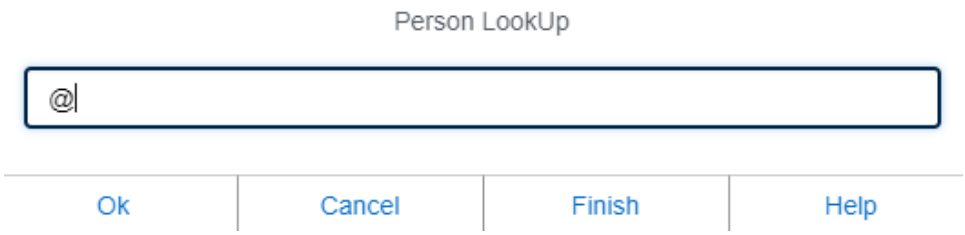
You can using the ‘Form Scaling’ feature to zoom in or out on a form:



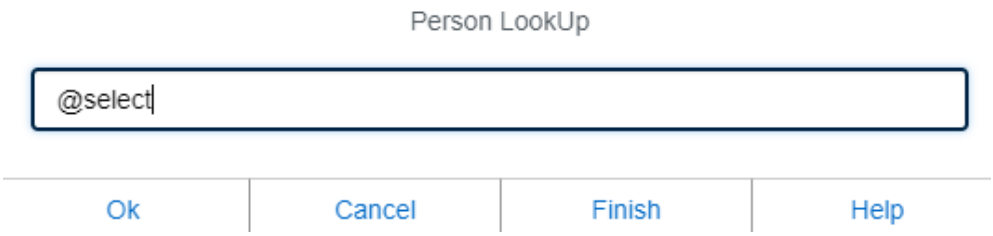
The form scale you set will be saved for this form only. Each time you access the form in the future it will zoom according to the saved value. All form scale values can be set or cleared using the form scale options in the ‘Settings’ menu. *(More on how to find this information in the Settings Menu section).*

The @ Sign and @SELECT

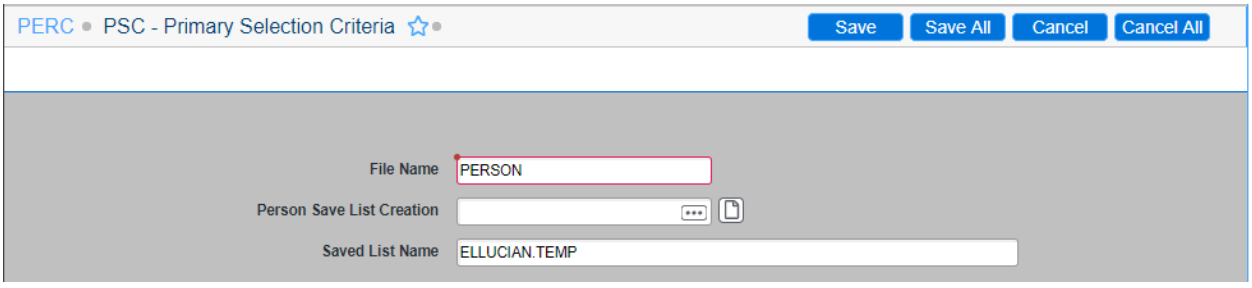
Sometimes you need to access a person's record in several different forms. For example, you may visit the NAE screen to view a birth date and then the STAC screen to see a list of registered classes and then the AIDE screen to see financial aid awards. Using the 'Pin' option in the person's context card will accomplish this by keeping the context card active while you navigate from form to form. You can also use the @ sign to pull up the most recent ID in each form.



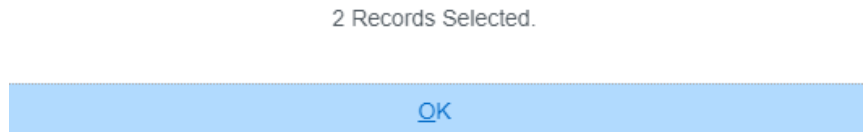
Colleague gives you the ability to use a savedlist of person IDs to process through several records on the same form. For example, you may want to pull up a list of 20 students and check their restrictions. You can do this using the '@SELECT' option. On the person lookup area of the form, type '@select'



This option will load the 'Primary Selection Criteria' form where you can enter 'Person Saved List Creation' criteria or a 'Saved List Name':

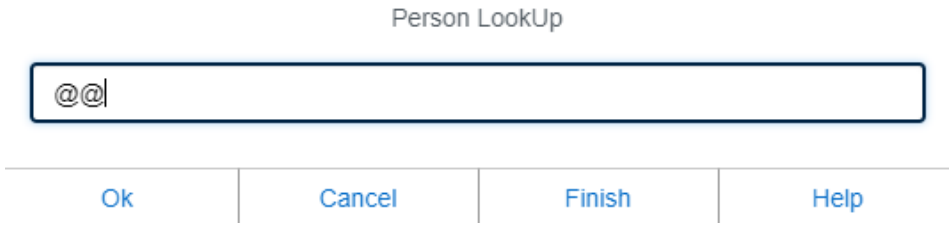


After the savedlist is loaded you will see a message with the number of records that were selected:

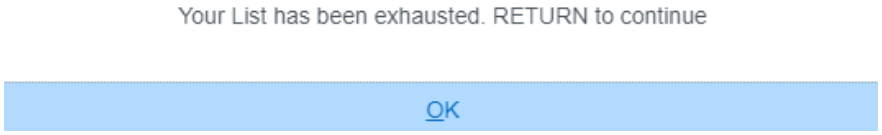


Now click ‘OK’ and then ‘Update’ to get you back to the form.

You can now use the ‘@@’ or ‘#’ option to proceed through the records in the savedlists, loading one at a time into the form:



When you cancel or save out of the form your savedlist of IDs is still loaded into memory so you can navigate to another form and still use the ‘@@’ option to proceed through the IDs that are active in memory. Once you have proceeded through all the IDs in the savedlist you will see this message:



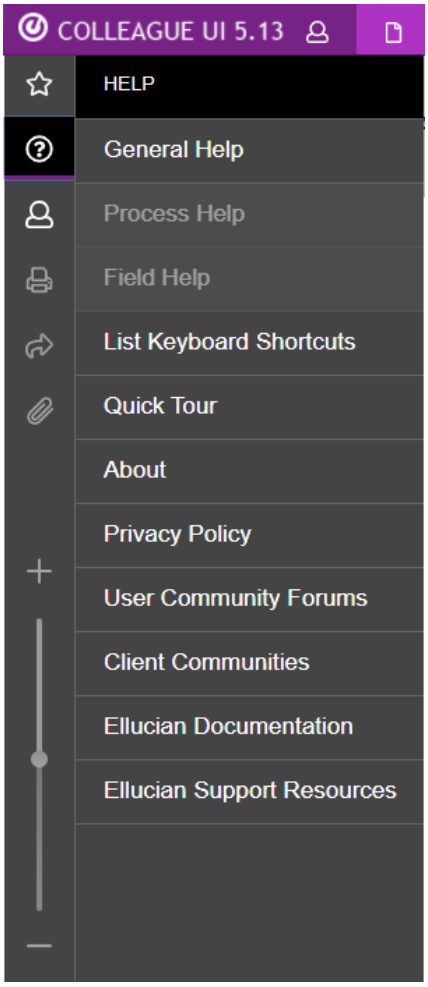
At this point you will have to load the savedlist or another savedlist to use the ‘@@’ option to proceed through the IDs again.

If you have many records in your savedlist and you are unable to make it all the way through the list you can save your progress through the list by using the ‘@save’ option. This will let you save the remainder of your savedlist IDs that haven’t yet been processed so you can pick them up at a later time.

To use the ‘@save’ option just type ‘@save’ where you would normally enter ‘@@’ and the system will prompt you for a new savedlist name. You can use this savedlist name the next time you need to proceed with the list of records you are working with so you don’t have to start at the very beginning of the list.

The Help Menu

The Colleague Help menu contains resources to aid your day-to-day work. There is a list of keyboard shortcuts to aid in data entry and navigation within the UI. There are also links to the Ellucian community forums, Documentation, and support resources where you can find help for a variety of system processes.

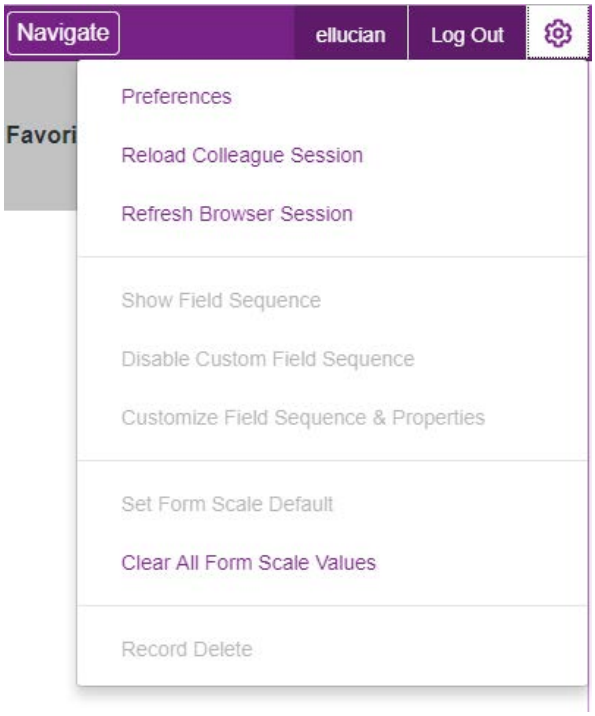


Note: The 'Quick Tour' is currently disabled.

In the **Search Area** section of this manual under **Alternate Field Search** birth date was used as a search parameter. But how do you know what the field is called in the back-end database? The **Field Help** gives us that information. Whenever you are in a form you can click on a field and choose **Field Help** from the menu. A Colleague Help page will pop up in a new window to explain the field and how it is used.

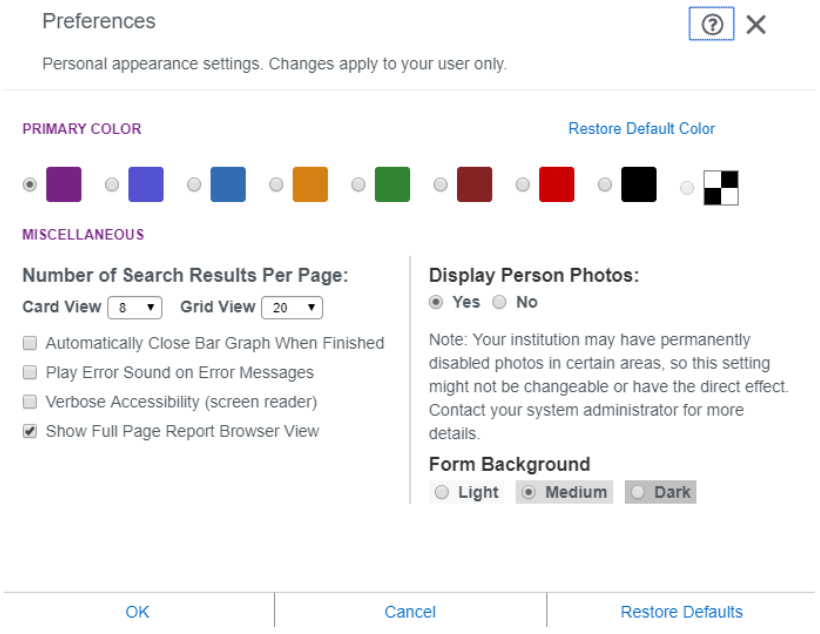
The Settings Menu

The **Settings Menu** in Colleague gives you the ability to customize your user experience in the system.



Preferences

The **Preferences** option will allow you to change the look of Colleague UI.



Primary Color: This affects the color of the main header in Colleague.

Number of Search Results Per Page: Choose the number of Cards and Rows displayed in the Search Results panel.

Checkboxes: Allow you to toggle error sounds, screen reader, and report functionality in the UI.

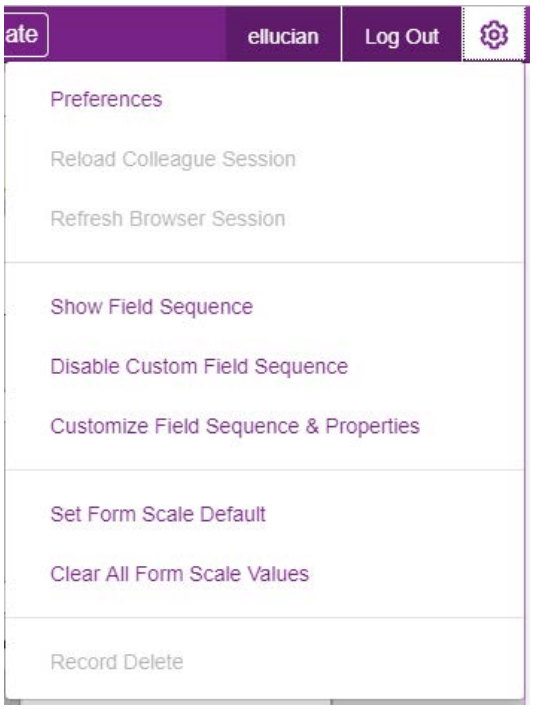
Display Person Photos: Enable or disable the display of photos in the Context area. We are currently not using person photos in the Colleague system.

Form Background: Adjust the form background colors to your liking. This setting is specific by user.

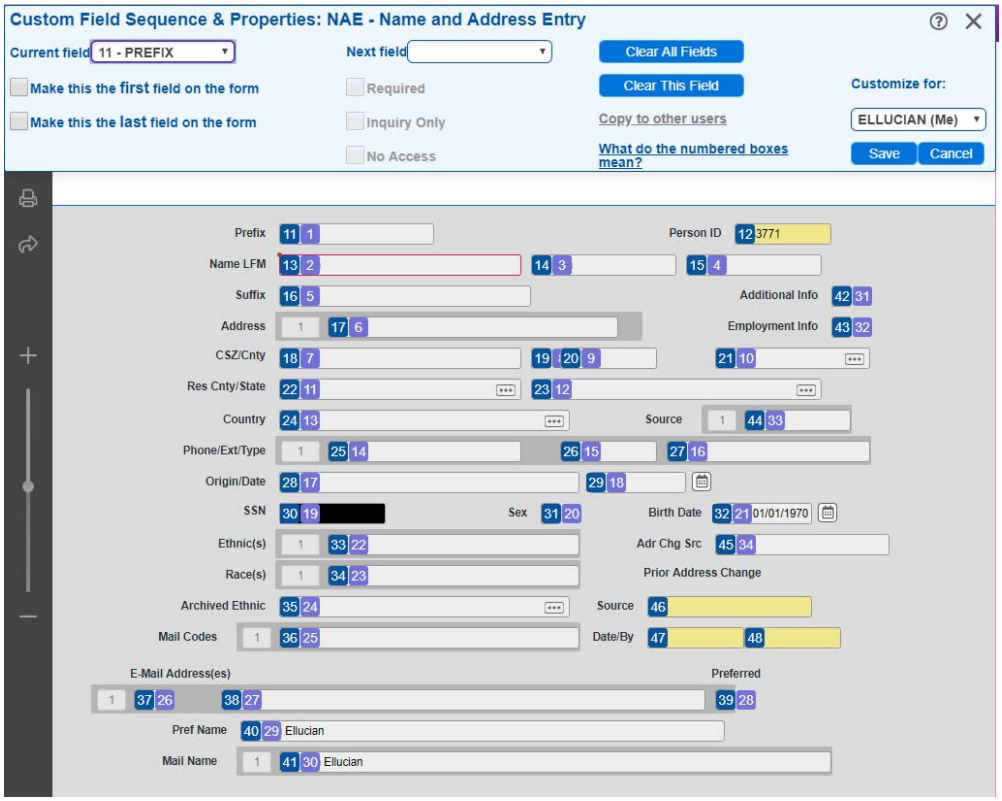
Refresh Browser Session

Some browsers (specifically Chrome) do not manage cache memory well in all circumstances. If you notice your session become sluggish, choose the 'Reload Browser Session' option to clear cache memory in your current browser session and stay logged into Colleague. You will notice an immediate speed increase in the UI after using this option.

If you have a form loaded in Colleague, clicking the **Settings** menu will allow you to change the way you interact with the form by giving you the option to show and customize the field sequence or set the Form Scale (or zoom) properties of the form:



Customize Field Sequence & Properties



Changing the field sequence on a form is done on a user by user basis and can be helpful if you need to tab through a form in a certain field order. For instance, what if you wanted the *Last Name* to be the first thing entered on the NAE form, then the *First Name*, then the *E-Mail Address*. Here are the steps you would take:

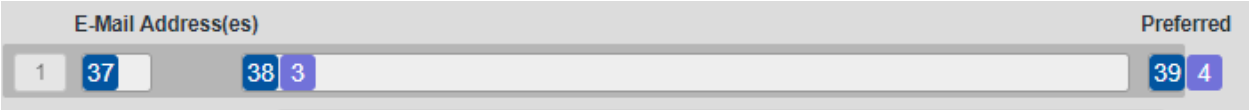
1) Click the *Name LFM* field (13) and select the checkbox 'Make this the first field on the form'

This will change the field from position 2 to position 1

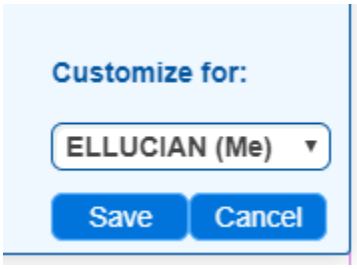
2) *First Name* (14) is still the next field in the sequence. Click the number 14 to select the field

3) Choose PERSON.EMAIL.ADDRESSES from the Next Field dropdown:

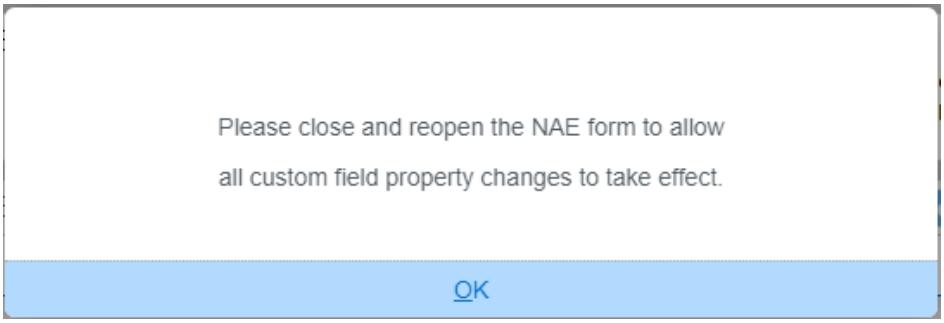
And now the email address is the third field to be entered on the form:



4) Now click the 'Save' button and your field sequence customizations will be stored

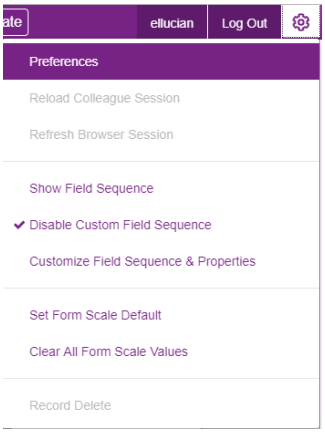


You will see a message similar to this:

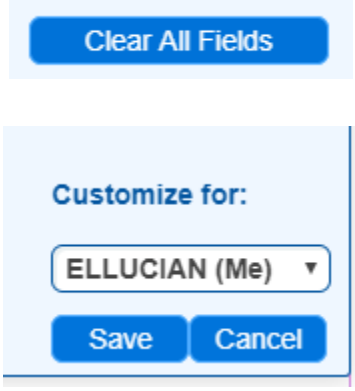


When you close the form and re-open it you will notice that the field sequence has been changed. Hit the 'tab' key to hop though the fields in the new order you just set.

You can also use the 'Disable Custom Sequence' option from the 'Settings' menu to revert to the default settings for the screen and your customizations will be overridden as long as that option is set.

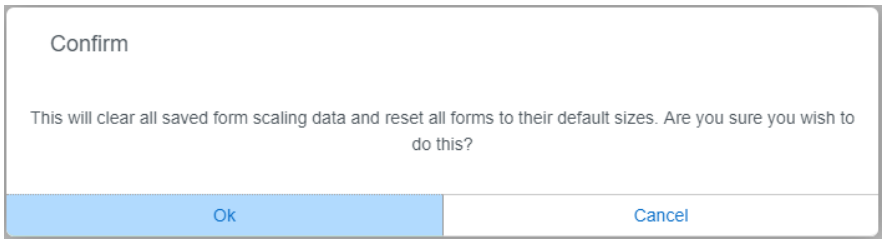


If you no longer want the custom field sequence you set for the form you can choose to 'Clear All Fields' and then save your settings so that the Ellucian-delivered default field sequence will be used on that form:



Clear All form Scale Values

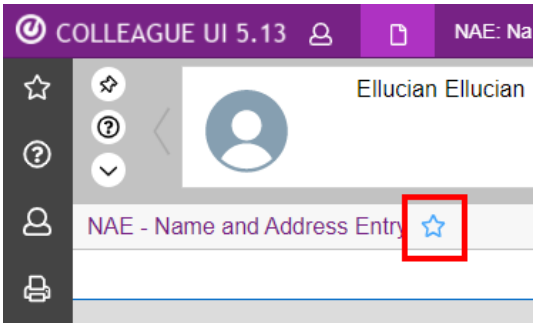
If you no longer wish to have your form scaling defaults set for Colleague, you can clear them by choosing the 'Clear All Form Scale Values' option. The system will ask for confirmation before your settings are cleared.



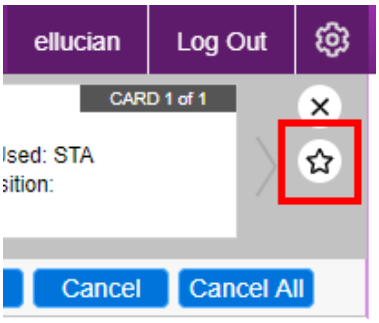
Keeping Track of Favorites (Forms & People)

There are certain forms in Colleague you use on a regular basis and some you use only a few times a year. With the 'Favorites' option you can save these forms and organize them into folders similar to the way you organize bookmarks in a web browser. This way you don't have to remember those important forms only in your head.

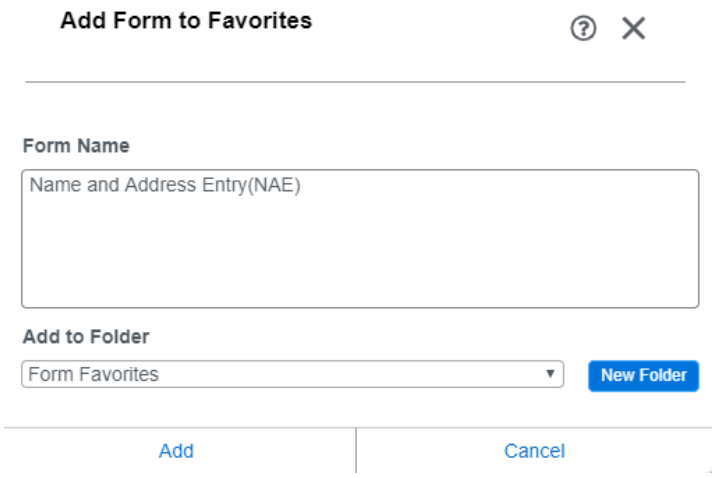
To favorite a form, click the star icon next to the form title once the form is loaded.



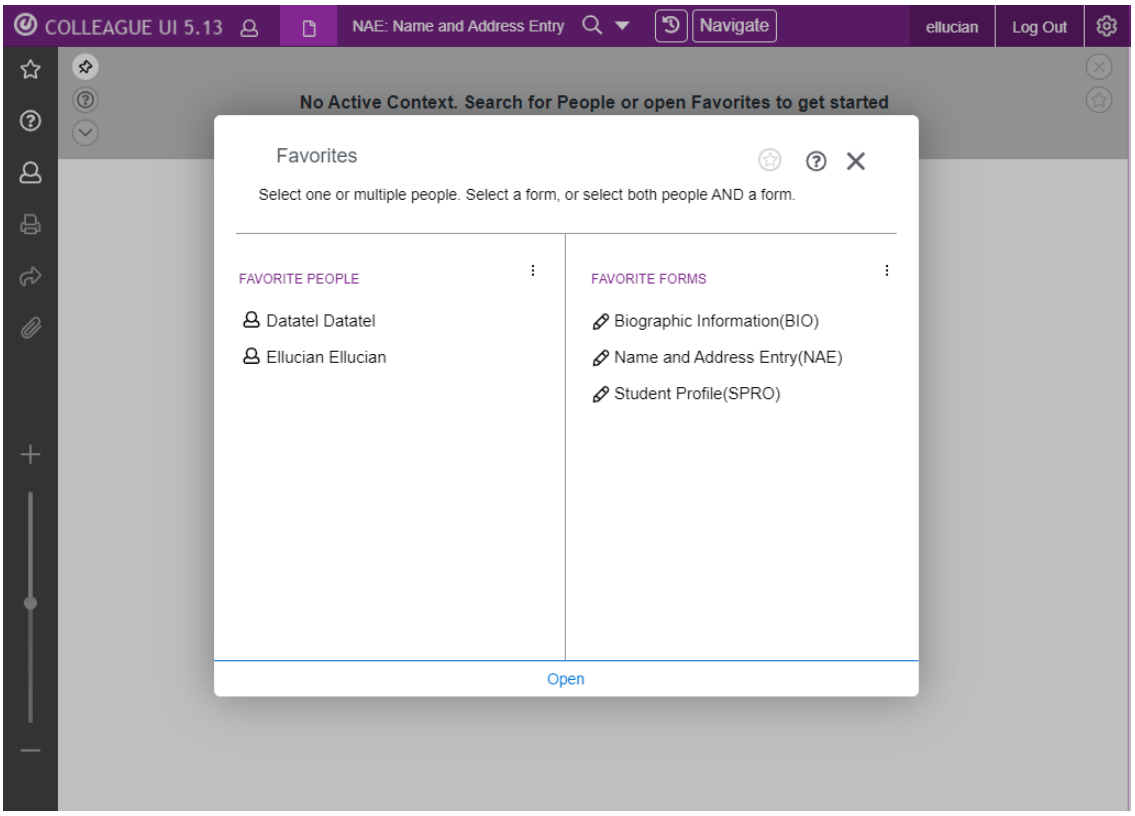
To favorite a person, click the star icon next to their context card. If multiple records are in context you can choose to add all of them to favorites.



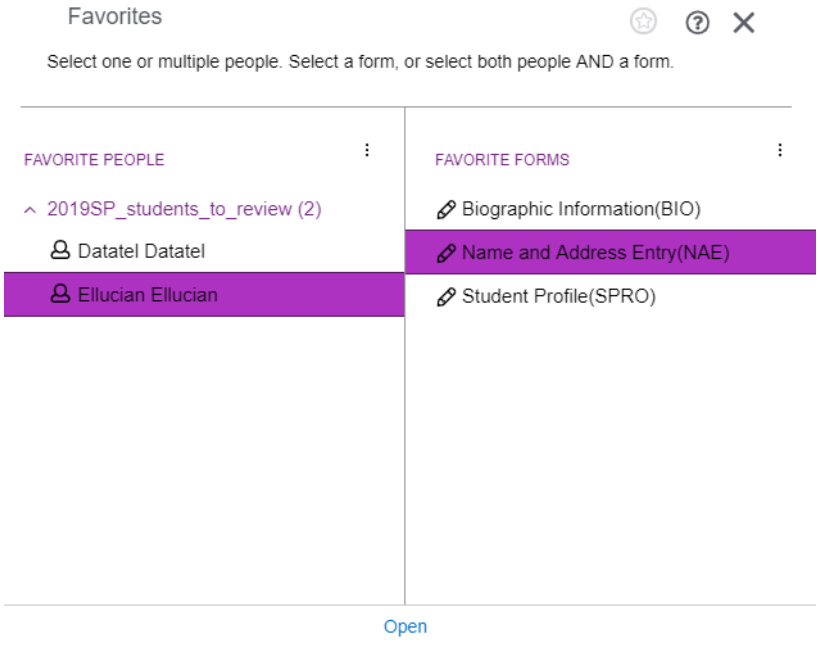
The Colleague UI gives you the ability to organize your favorite forms and favorite people with a folder structure. To create a folder, just choose 'New Folder' in the 'Add Form to Favorites' menu. Once the folder is created you can choose to save a form or person into that folder by selecting it from the 'Add to Folder' dropdown.



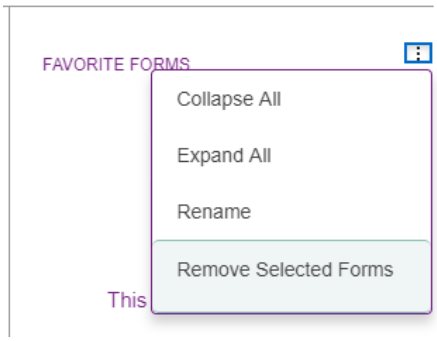
Clicking the favorites icon at the top left of the UI will open up your favorites menu so you can see all of your favorite people and forms:



You can open one of the **Favorite People** into one of the **Favorite Forms** by clicking on a favorite person and a favorite form and choosing 'Open'



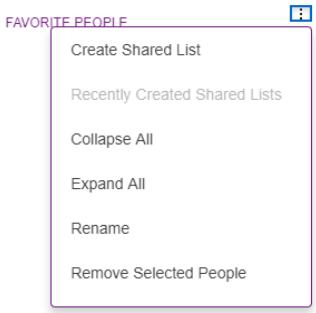
You can remove forms or people that you no longer favorite. Just highlight the person or form you want to delete, click the three vertical dots to the right of 'Favorite Forms, and choose 'Remove Selected Forms':



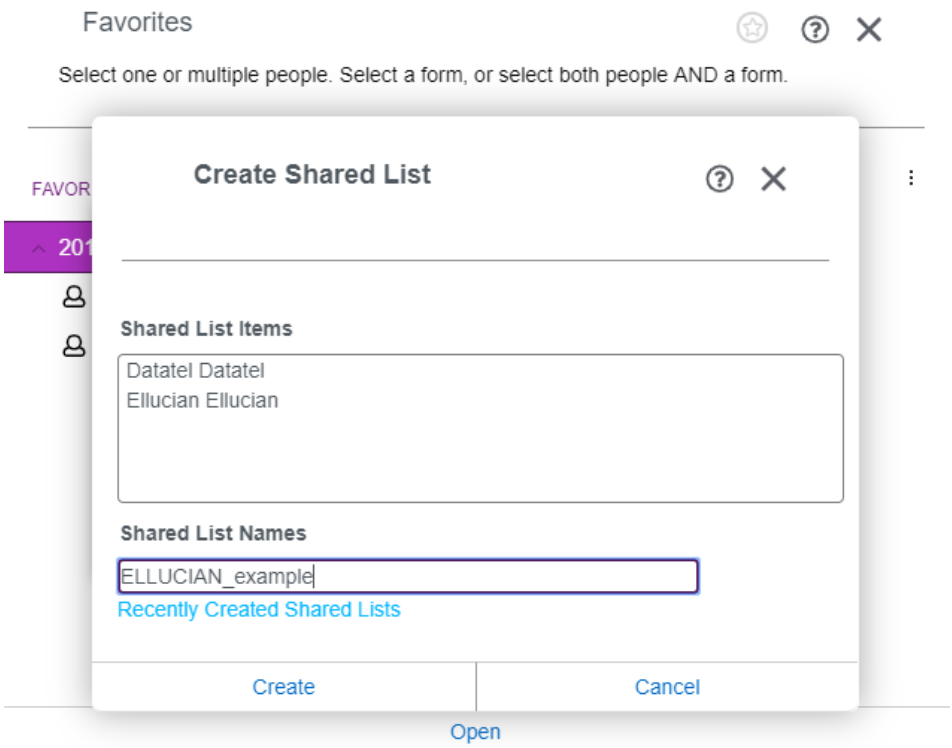
A similar operation can be performed to remove folders and Favorite People.

Shared Lists

You can share lists of person records with other users by clicking the three vertical dots on the Favorite People menu and choosing 'Create Shared List':

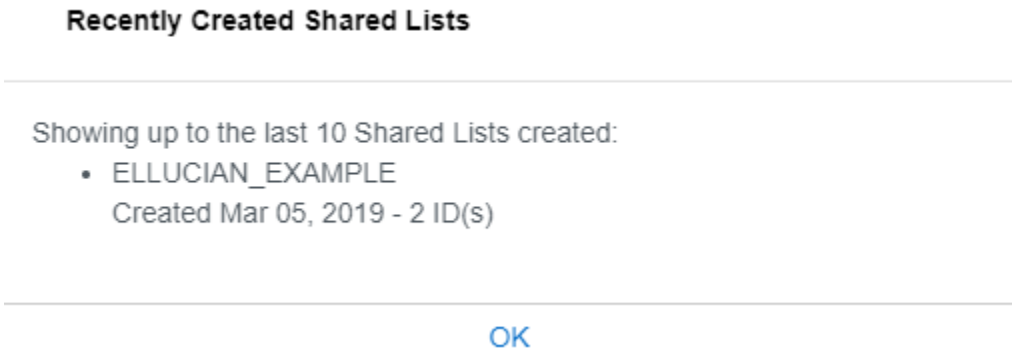


A **Shared List** can be created from any folder in the Favorite People area that contains favorite people, including the default folder.

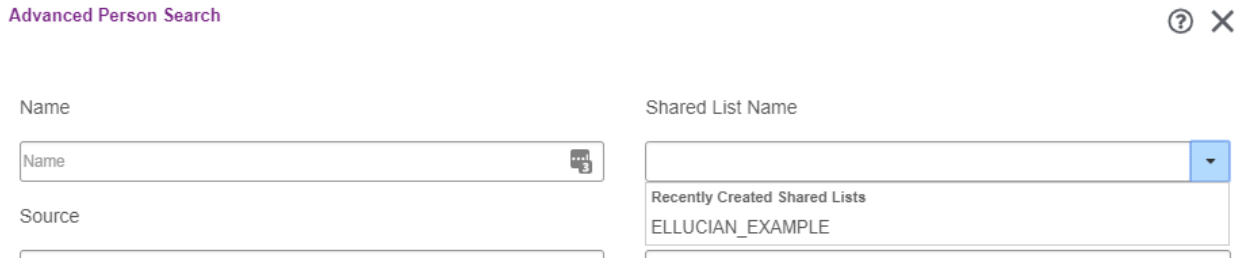


Choose a name that is appropriate for the list of person records you are sharing.

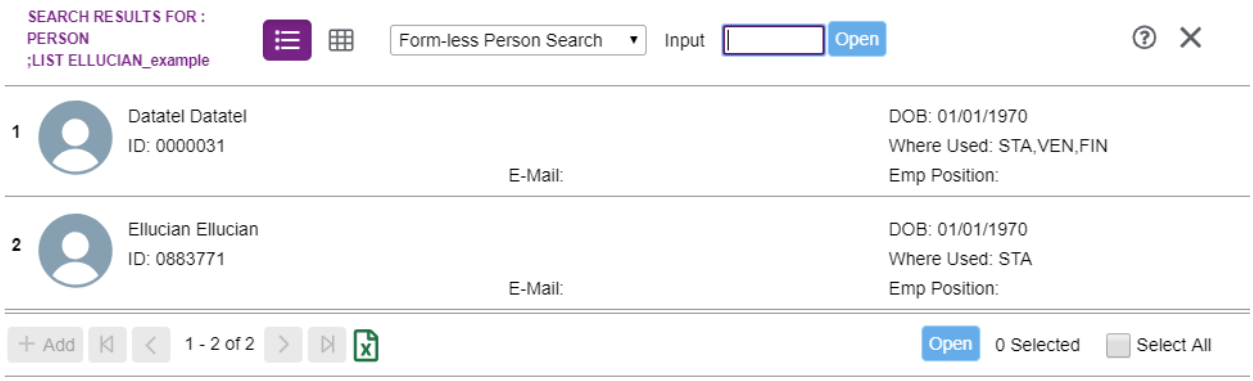
You can view the 10 most recent shared lists created in Colleague by accessing your favorites and choosing the 'Recently Created Shared Lists' option from the Favorite People menu.



Shared lists can be accessed through the **Advanced Person Search** functionality by choosing the shared list name from the dropdown menu and clicking 'Search'.



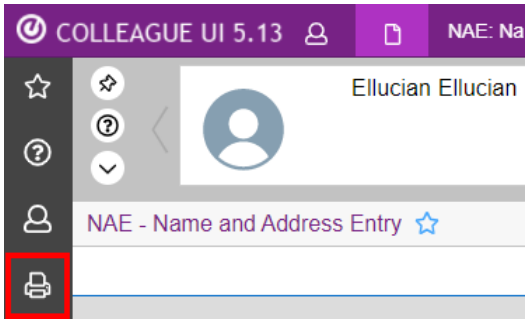
Once selected, the items in the **Shared List** come into the **Person Search**.



Shared Lists also get saved in Colleague under a savedlist name that is the same as the name of the **Shared List** and can be accessed on SLED if you have access to edit savedlists.

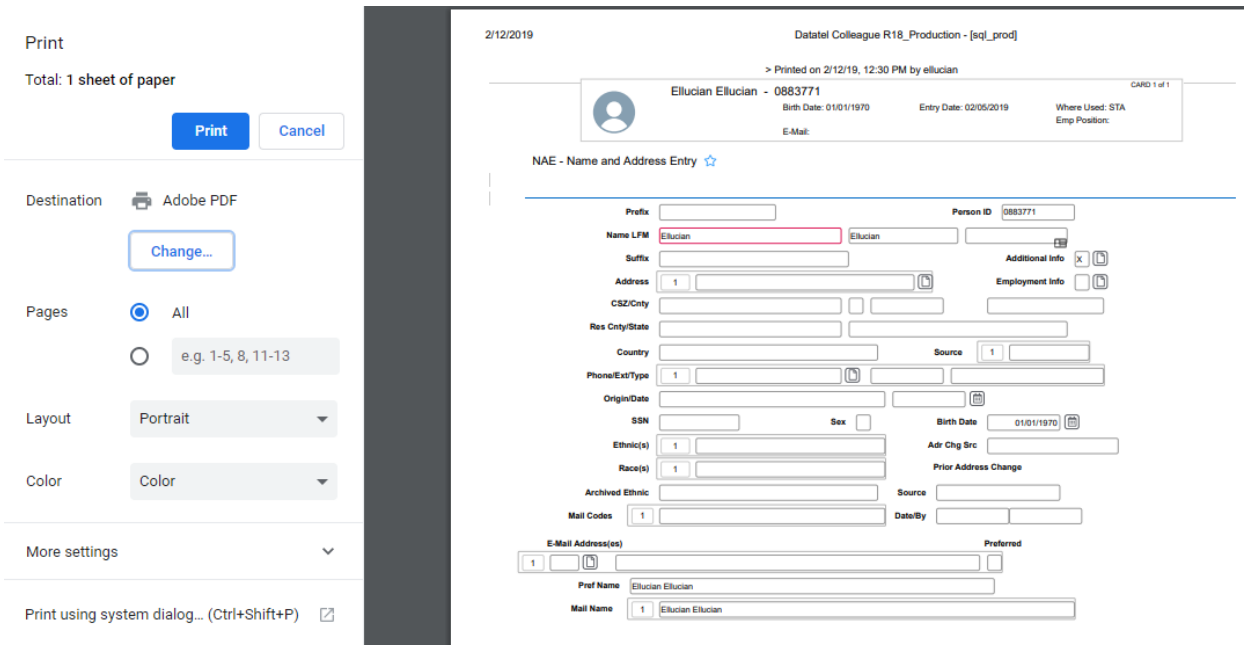
Printing in Colleague

The 'Printer' icon enables you to send the current form and its contents to a local printer or to a pdf document if you have a pdf printer set up on your workstation. These pdf screenshots can be very helpful when working with the Information Services Department to troubleshoot Colleague or to document a student's record at a point in time.



Printing Form Data

When you are in Colleague form that is displaying information you can click the printer icon to bring up your computer's print dialog and specify whether you want to print to a file or a printer.

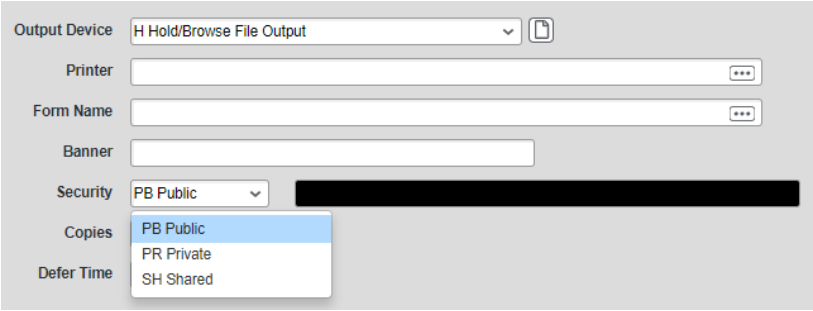


Any items that are blocked from view within a Colleague form, such as SSN, will not be printed to the physical printer or pdf file. This ensures that sensitive information is not displayed where it shouldn't be.

Printing Report Results

Many screens in Colleague produce printable reports. Sometimes these reports automatically send results to a printer without producing a report to your screen. Most reporting screens give you the option of printing to a physical printer, or the 'Hold/Browse' file directory.

If you are printing to the Hold directory you have the option of printing to your own private folder where no one else will have access to your document. You can choose this option from the 'Security' dropdown:



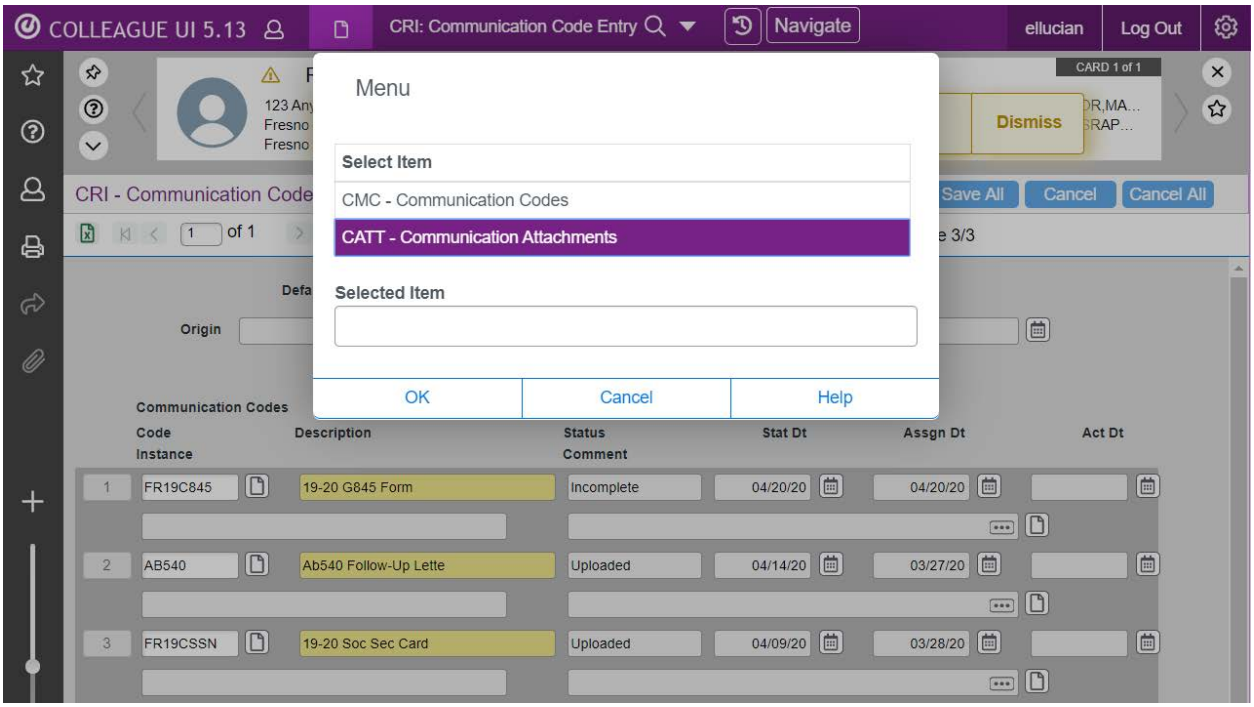
The default option is 'PB' Public. Choose the 'PR' Private option if you are generating sensitive information that you don't want others to have access to.

If you are printing to a physical printer select the 'P' option and either enter the printer name in the 'Printer' field or to a lookup by clicking the lookup icon to the right

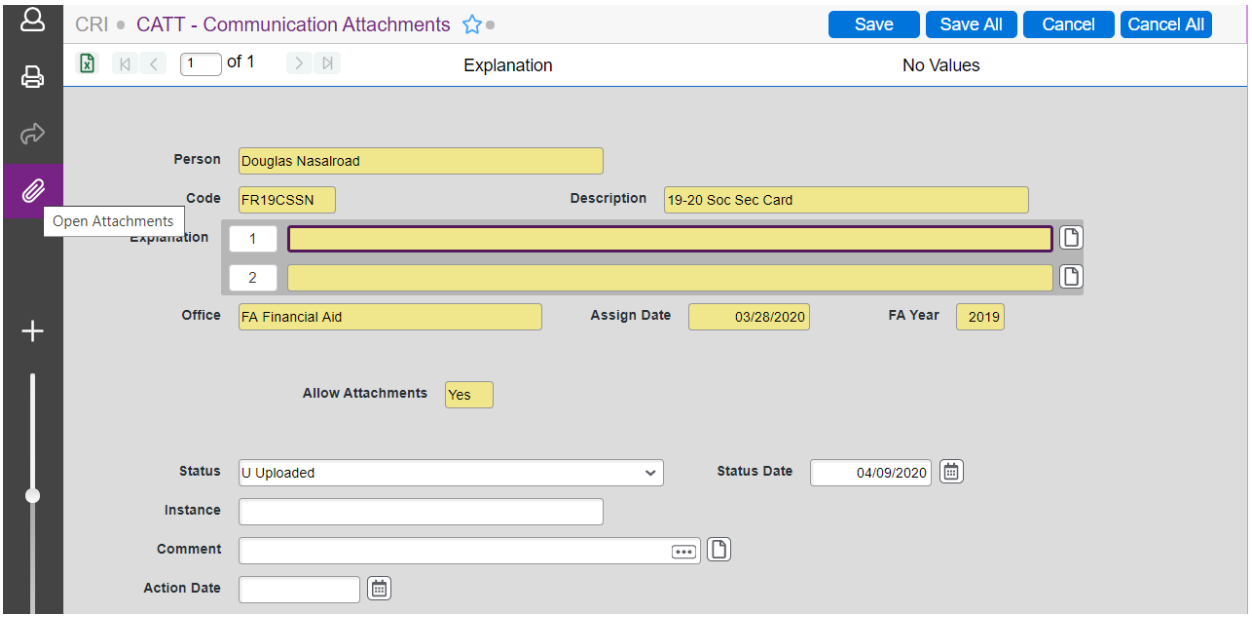
Using Attachments

Colleague is not meant to be a document repository, but the user interface does provide a way to view attachments that were uploaded through Self Service. If a document code is set up for attachments, the paperclip icon on the left navigation menu will turn white indicating that an attachment can be accessed for that particular communication code using the CATT screen.

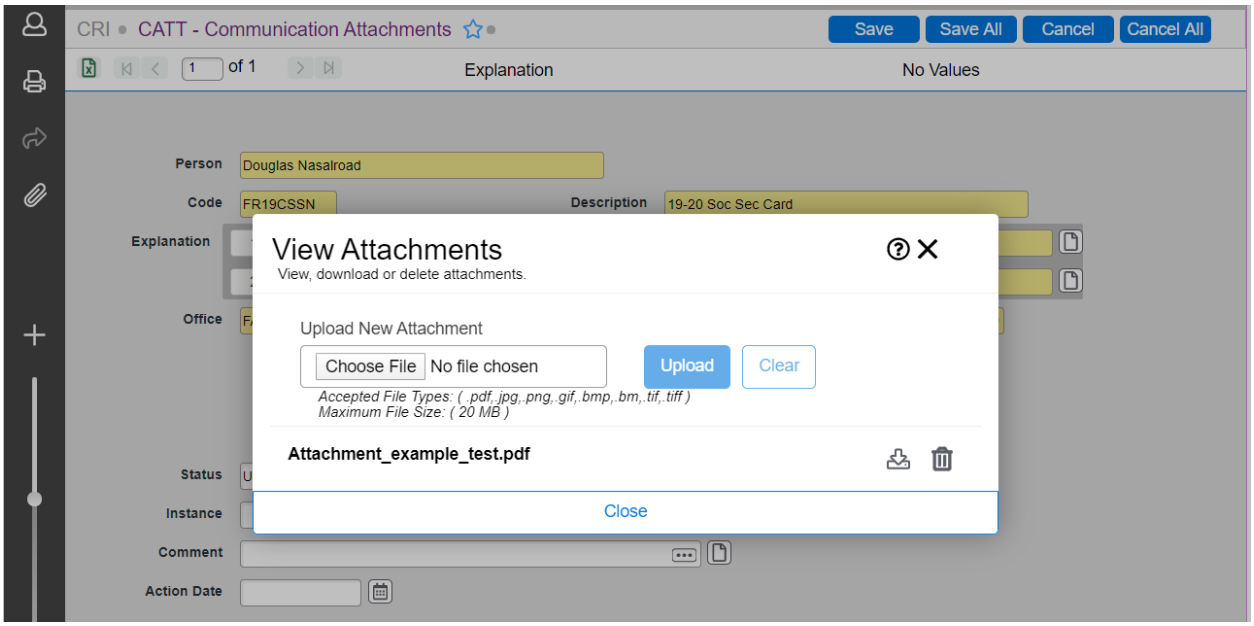
Attachments are stored encrypted on the Colleague application server and are not accessible outside Self Service or Colleague.



On CRI, detail in on the Communication Code to access the CATT screen for uploaded documents



Click the paperclip icon to open attachments



Depending on your access you can upload, download, or delete attachments

Logging Out Of Colleague

It is important to close out your browser session properly so Colleague can release system resources and disconnect your user account from the SQL database. When you are done with your Colleague session, use the 'Log Out' button at the top right of the screen to exit Colleague and close your database connection.

Depending on the browser you use to access Colleague you may also have to click the exit button to close down the browser session. For example, Microsoft Edge will close down for you and Google Chrome requires you to manually close down the browser after logging out of Colleague.

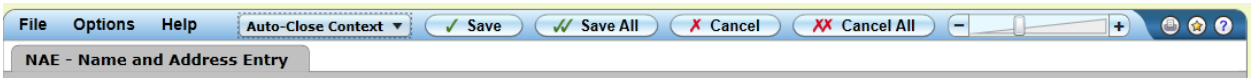
Differences from UI 4.5 to UI 5

Although both versions of the Colleague UI connect to the same database, display the same information, and use the same security setup, each functions a bit differently and they look much different from each other.

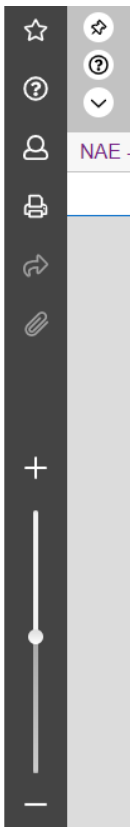
Menu Structure

In Colleague UI 5 the menus are displayed on the left-hand side of the screen rather than in the form area as they were in Colleague UI 4.5.

Colleague UI 4.5 Menu Structure



Colleague UI 5 Menu Structure

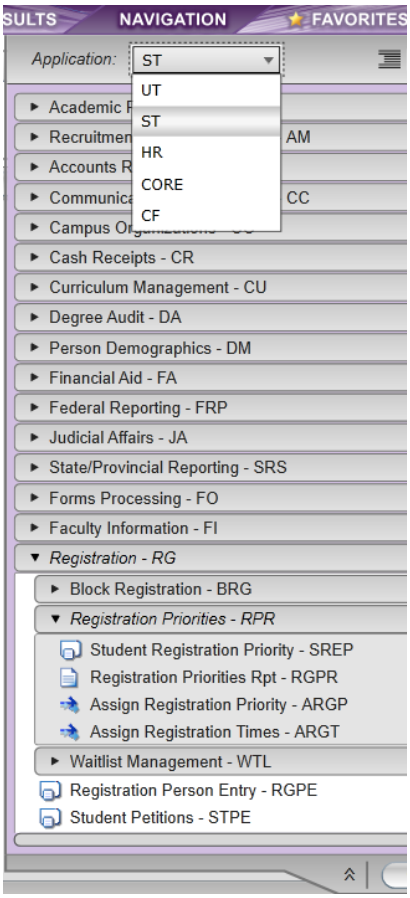


Navigating the Hierarchy

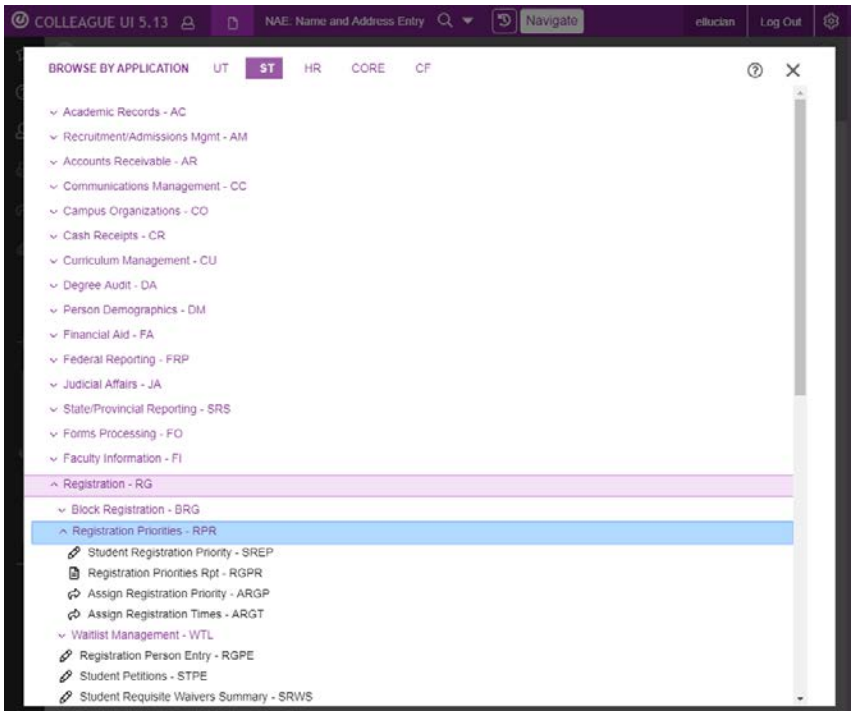
Besides **Form Search**, another way to access forms in Colleague is by **Navigating the Hierarchy**. You can view a list of the forms you have access to by clicking the 'Navigate' button to the right of the search bar and selecting the proper application (HR, ST, CF, etc).

The navigation menu in Colleague UI 5 is similar to navigation in UI 4.5 but now allows you to quickly assess the applications you have access to at the top level.

Colleague UI 4.5 Navigation



Colleague UI 5 Navigation



Double-clicking on a navigation menu item will load the form into the **Form Area**.

Calculator Button

The Calculator Button in Colleague UI 5 allows a calculation to be made if the field stores a number. This can be a handy way to make a calculation within the UI rather than

having to access a physical calculator or one provided by your computer operating system.

Lookup Button

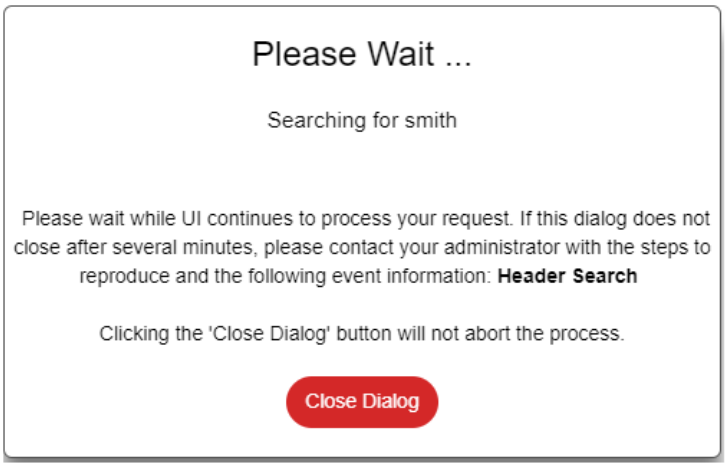
The **Lookup button** indicates that the field allows you to search for a value to be entered using ellipsis '…' as the wildcard character to look up information. Hovering your mouse over the lookup icon will indicate which field is being used for the lookup.

Please Wait … Dialog

One of the most useful new features in Colleague UI 5 is the 'Please Wait …' dialog box because it gives end-users insight into Colleague's processing status.

Some Colleague processes can take a while to generate results due to factors such as running multiple calculations or lookups per record in order to produce a report or update records in batch. These transactions involve large overhead and use of system resources. In previous UI versions it was difficult to tell if the process you initiated got hung up or was still processing in the background after a certain amount of time had passed. This would lead to end-users closing out their browser window to login in again, creating another Colleague session and possibly leaving the previous session open in the background.

To indicate that Colleague is still processing your request, the 'Please Wait' dialog will pop up to give an informative message regarding the transaction. For example, this pop up happened during a **Person Search** for the name 'smith':



When you see this dialog box you can leave it up or click 'Close Dialog' to close it. If you choose to close it **your process will continue to run** and results will be displayed after Colleague has finished processing the transaction.

Requesting a Colleague Account

Some job functions require access to Colleague to enter information and run reports and some do not. If your position in the district requires access to the Colleague system for view-only or maintenance access have your supervisor fill out the Technology access form located on the IS intranet site and send to helpdesk@scccd.edu.