Colleague by Ellucian
Accessibility Guide
for User Interface 5.4-5.5

Colleague Release 18, Colleague UI 5.4-5.5
December 14, 2017

Accessibility Guide for Colleague UI.

Welcome to a guide for users new to Colleague User Interface version 5. This document will highlight some of the key accessibility features in Colleague UI released with version 5.1, as well as enhancements and updates made through version 5.5. This document can also act as a reference for more experienced users looking for features. Colleague UI 5 replaces the Silverlight interface from Colleague UI 4 with an HTML interface, which allows you to use many features native to your accessibility tool for web pages. In addition, Colleague UI 5 includes enhancements to make navigating among Colleague UI features and Colleague forms easier and more efficient.

Colleague UI 5 was tested using three different browsers and two assistive technology programs. Follow this hyperlink to review the testing for Colleague UI 5. Ellucian recommends using JAWS 17 with Internet Explorer 11 and NVDA 2016.3 with Firefox 55.03. Note that as of the release of Colleague UI 5.4, reported issues with Firefox 57 render many accessibility features inoperable. In this document, the assistive technology is referred to as the reader.

This document describes features and functions of Colleague UI 5 regardless of which reader you are using. Descriptions of the announcements that Colleague UI makes are generic since each reader has its own way of interpreting the labels defined for accessibility. Colleague UI 5 makes extensive use of labels and ARIA tags to describe where you are in the interface and what you can do. Follow this hyperlink to read about how Colleague UI 5 defines the text for accessibility announcements. Follow this hyperlink to learn how you can contribute to making the accessibility features of Colleague UI better.

Any time you access Colleague Help, the help will be rendered in a separate browser window or tab, depending on the browser and browser settings. Internet Explorer tends to open Colleague Help in a separate browser window, while Firefox opens a new tab in the current browser window. The rest of this document assumes this difference and will only refer to a separate browser window.

In general, the following shortcut keys are useful, regardless of where the focus is currently in Colleague UI.

CONTROL ALT H. This Colleague UI shortcut opens context sensitive Colleague Help in a separate browser window
CONTROL ALT K. This Colleague UI shortcut opens Colleague Help in a seperate browser window, listing all keyboard shortcuts.
ESCAPE. This Colleague UI shortcut closes any open dialog box or panel within Colleague UI. This shortcut does NOT work to close Colleague UI forms. Depending on your reader settings, you may need to press ESCAPE twice to close a panel. Focus will return to the last focus field on an open form or to the Search Box.
CONTROL ALT S. This Colleague UI shortcut will focus on the Search Box. If focus is already on the Search Box, this shortcut will toggle between Person Search and Form Search.

Follow this hyperlink for a listing of all keyboard shortcuts available in Colleague UI 5.4 and 5.5. Follow this hyperlink for a listing of helpful keyboard shortcuts for JAWS. Follow this hyperlink for a listing of helpful keyboard shortcuts for NVDA.

Note that using certain controls in the mouse-driven world requires a double-click event, so you may need to use your reader's keyboard shortcut for a double-click event to use some controls. Ellucian's testing found that CONTROL ENTER also works in these cases. Also note that when selecting buttons for dialog boxes, using simply SPACE or ENTER may not activate the button. Ellucian's testing found that CONTROL SPACE works consistently in these cases.

Using Colleague UI.

To log in to Colleague UI, launch a browser window and access your institution's Colleague UI website. There are two ways to launch Colleague UI. Follow this hyperlink to review the two launch options. When the Colleague UI login window launches, a dialog may appear briefly that says Loading Colleague UI before focus moves to the field for entering your login ID. When the reader announces, User Name, enter your login ID, and then press TAB to move to the password field. The reader will announce, User Password. As you type in your password, the reader will announce, star, for each character. After typing in your password, press ENTER to launch Colleague UI. There may be a pause as Colleague UI authenticates your login and retrieves configuration information. The reader cannot focus on the progress bar that Colleague UI displays, so there is nothing for the reader to announce. If you enter an incorrect login ID or password, focus

will return to the user ID field and the reader will announce User ID or Password provided is incorrect. Enter your correct user ID and password to login.

When you first launch Colleague UI, no forms or people are selected yet. Focus is in the Search Box. The reader will announce the name of the window, including Colleague UI with the version number, and Ellucian Colleague UI. The reader will announce the window name each time you refocus on the Colleague UI window. The reader will then announce one of the two modes available for the Search Box, Search for a form or Search for a person, and read any value in the entry box, if present.

The first time you log in to Colleague UI, you will need to set a flag to activate certain accessibility features of the software. Follow this hyperlink for the procedure to enable additional Colleague UI accessibility features.

The main reason to use Colleague UI is to execute Colleague forms. Follow this hyperlink to review features available when executing a Colleague form. Follow this hyperlink to review features available when using Colleague batch and report processes.

Use the TAB key to navigate among the features of the main Colleague UI panel. Below is the TAB order for the main panel when no forms are active and no people are selected. Each item in the list is a hyperlink to allow quick access to documentation on that particular feature.

Search Box.
When the search box is in Form Search mode, the next three TAB stops are
Show Form Search History
Show Form Search Results
Navigate
When the search box is in Person Search mode, the next three TAB stops are
Show Person Search History
Show Person Search Results
Advanced Search
Log Out button. Follow this hyperlink to read more about Logging out of Colleague UI.
Options Menu
When there are no Person Cards in the Context Area, the next TAB stops are
Close Context Toggle Button
Context Area
Open Favorites.
Open Help Options.
Open User Options

When there are Person Cards in the Context Area, there are additional tab stops. Follow this hyperlink to read more about using the Context Area. Between the Options Menu and the Open Favorites button the TAB stops are

Close Context Toggle button
Help for Context Cards
View All Records in Context
Previous Record button (When there is two or more context cards displaying)
Person Card
Next Record button (When there is two or more context cards displaying)
Close Context button
Add Person to Favorites button

Using the Colleague UI Search Box.

You can return focus to the Search Box from anywhere in Colleague UI by pressing CONTROL ALT S.

Use the Search box to select a form or person to work with. To open a form, make sure the reader has announced search for a form, and then type the form's mnemonic. If the reader has announced search for a person, enter CONTROL ALT S to toggle the Search Box mode to Form Search.

In most cases, when you enter the mnemonic for a form in the search box, the form opens immediately. Some forms require that you also select the application that you want to open them in. After you enter the mnemonic for one of these forms, Colleague prompts you for the application. You can also open those forms immediately by entering the application

mnemonic and the form mnemonic together, separated with a dash. For example, enter "U T – S O D" or "S T – V A L". Forms opened in this way are not stored in your search history.

If you don't know the mnemonic for a form, you can use the Form Search feature to find the form you want. Simply type a word from the form's title in the search box, like 'address'. Colleague will render a dialog box that says please wait dot dot dot processing dot dot dot while Colleague is searching for matches to your search string. As you type in your search string, Colleague UI will open the Form Search History panel with forms from your search history that match the current search string. Use the UP ARROW and DOWN ARROW keys to scroll among these matching forms. After you have scrolled through all the matching forms, your entered search string returns to the Search Box. To search for forms, press ENTER to submit your search string. Follow this hyperlink to review the features available for Form Search results.

Another way to search for forms is to navigate Colleague's menu structure. Follow this hyperlink to read more about Colleague UI's Navigate feature.

To search for a person, press CONTROL ALT S to return focus to the Search Box. If the reader announces Search for a form, press CONTROL ALT S again to toggle to Person Search mode. Then type the person's name or other search string in the search box. You can also use the same person LookUp options that were available in prior versions of Colleague. Follow this hyperlink to learn more about Colleague Person Search Shortcuts. As you type in your search string, Colleague UI will open the Person Search History panel with search strings from your search history that match the current search string. Use the UP ARROW and DOWN ARROW keys to scroll among these matching strings. After you have scrolled through all the matching strings, your entered search string returns to the Search Box. Once you have entered a search string or selected on from history, press ENTER to perform a search. Follow this hyperlink to review features available for Person Search results.

If you know the ID number for the person, enter it directly into the Search Box. You can leave off leading zeroes. Colleague UI will bypass the normal Person Search and retrieve the person directly.

Once you have entered a valid person ID, or have selected one or more person records from Person Search results, Colleague UI will populate the Context Area with your selected person records. Follow this hyperlink to read more about the Context Area in Colleague UI.

Some institutions elect to disable Person Search from the Search Box. Contact your system administrator to determine whether Person Search is available from the Search Box.

Another way to search for a person is to use Colleague UI's Advanced Search feature. Follow this hyperlink to read more about the Advanced Search feature.

Finding a Form in Colleague UI

Colleague processes are the main reason you are using Colleague UI. This document generically refers to the processes as forms, but there are other types of processes as well. This section of the document describes the ways available for you to search for and select Colleague forms for execution.

Using Form Search History.

You can access Form Search History by using the keyboard shortcut CONTROL ALT 5 when the Search Box is in Form Search mode. Focus will be on the Clear All Form Search History button.

You can open the Form Search History Panel by pressing SPACE or ENTER when focus is on the Show Form History button. The Form Search History dropdown lists all the forms you have accessed by mnemonic from the Search Box or selected from form search. Each form is list alphabetically by mnemonic. Focus is returned to the Search box after opening the History panel. Use the UP and DOWN ARROW keys to scroll through the list of history items. Each entry in the list includes the mnemonic and title of the form. When you find the form you are looking for, press ENTER to execute that form. Note that if a search string is selected in the Search Box when you open the Search History panel, only forms that match that search string will be listed.

You can access the Form Search History panel to maintain the list of forms in your history. To access the Form search History panel from the Search Box, pres TAB to focus on the Form Search History button, then press SPACE. Then, press TAB six times to go through Show Form Search History, Show Form Search Results, Navigate, Log Out, Options

Menu, and finally to focus on Clear All in the Form Search History Panel. As mentioned above, you can also use the keyboard shortcut CONTROL ALT 5 to open the panel and focus on Clear All.

To clear all forms from Form Search History, press SPACE to activate the Clear All Form Search History button.

Press TAB from the Clear All button to focus on the Help for Form Search History button. Press SPACE to open a new browser window for Colleague Help for Search History. Focus will remain on the Help button in the Colleague UI window.

Press TAB from the Help button to focus on the Close Panel button. Press SPACE to close the Form Search History panel and return focus to the Search Box.

Press TAB from the Close Panel button to focus on the first form in your history list. Focus will be on the button for the first form in your list. Each entry in the list is a pair of buttons, one button for the form and a button to remove the form from the list. Use the UP ARROW and DOWN ARROW keys to navigate between form buttons in your history list. Use the TAB and SHIFT TAB keys to move from the form button to the remove button. To execute a form from your history list, press SPACE when focus is on the button for that form. To remove a form from your history list, press SPACE when focus is on the remove button for that form. Use TAB to alternate between form button and remove button. Use the ARROW keys to move between form buttons.

Using Form Search Results

You can access the Search Results panel from anywhere in Colleague UI by pressing CONTROL ALT R. When the Search Box is in Form mode, this shortcut will open the Form Search Results panel.

Colleague will render the Form Search Results panel and focus is initially in the Input entry box. The reader will announce, Form View Search Results for, the search string you entered, and the number of results. The announcement also includes the entry options available for the Input entry box. You can select search results by number or enter a letter to perform a command.

To execute a form in a particular row, enter the number of the row, and then press ENTER.

To jump to and focus on the results in a row, enter the letter **J** followed by the number of the row, and then press ENTER. The reader will announce the row number, the mnemonic, the name of the form, the form's application in a dialog box. To close the dialog, press SPACE to activate the OK button. To select the form in that row, press SPACE to toggle selection. To execute the selected form, press ENTER. Focus will leave the Input box and be on the row you indicated. To return focus to the Input box, You will need to press SHIFT TAB a few times.

To read the results in a row, enter the letter **R** followed by the number of the row, and then press ENTER. The reader will announce the row number, the mnemonic, the name of the form, the form's application, and whether that row is currently selected or not in a dialog box. Press SPACE to close the dialog box.

From the Input Box, you can navigate to other areas of the Form Search Results panel. When a search result is selected, press TAB for focus on the Open Selected Form button. Press SPACE to open the selected form. Press TAB from the Input Box when no form is selected, or from the Open button, to focus on the Form Search Results Help button. Press SPACE to open a new browser window for Colleague Help for Search Results. Focus will remain on the Help button in the Colleague UI window. Press TAB from the Help button to focus on the Add Form to Favorites button. Press SPACE to add the selected form to your form favorites. Follow this hyperlink to read more about Colleague UI's Favorites feature. Follow this link for more information about adding forms to Favorites. From the Favorites button, press TAB to focus on the Close Panel button. Press ENTER to close the Form Search Results panel and return focus to the Search Box.

To focus back on the Input box from anywhere in the Search Results panel, press ALT eye.

The results area of the Form Search Results panel is a table listing forms that match you search criteria. There are four columns in this table: the row number of the result, the name of the form, the mnemonic for the form, and the application in which the form is defined. The name, mnemonic and application columns are sortable. The default sort for Form Search Results is by application, by mnemonic. Press TAB from the Close Panel button to focus on the column header for the Name column. Press SPACE to sort the results by the name of the form. Focus remains on the name column header. Press TAB from the name column header to focus on the mnemonic column header. Press SPACE to sort the results by the mnemonic of the form. Focus remains on the mnemonic column header. Press TAB from the mnemonic column header to focus on the application column header. Press SPACE to sort the results by the application of the form. Focus remains on the application column header.

Note that a bug in UI 5.4 prevents sorting Form Search Results columns using SPACE. Keyboard shortcuts currently do not work for sorting these columns.

Press TAB from the application column header to move into the table of results. For each row, the reader will announce the information in each column, whether the row is selected, and the row count. To select the form in the current row, press SPACE. To execute a selected form, press ENTER. You can also use the following keyboard shortcuts to navigate the rows.

To move up one row in the list of results, press the UP ARROW key or press TAB.
To move down one row in the list of results, press the DOWN ARROW key or press SHIFT TAB
Note when using the arrow keys, focus will not leave the results area. UP ARROW from the first result and DOWN ARROW from the last result will not do anything and focus will remain on that row. TAB from the last result and SHIFT TAB from the first result will move focus out of the results area.
To move down 8 rows in the list of results, press the PAGE DOWN key.
To move up 8 rows in the list of results, press the PAGE UP key.
To move to the first row in the list of results, press the HOME key.
To move to the last row in the list of results, press the END key.
To close the Form Search Results panel without selecting a form to execute, press the ESCAPE key.

You may select only one form to execute. As you focus on a row using the paging keys or by jumping to a row, the reader will announce the row number, spell the form's mnemonic, read the form's title, and announce the form's application. The reader will then announce, Press spacebar to toggle selection, and then ENTER to submit.

After you have determined which form from the list of results you want to execute, press ENTER. Colleague will exit and close the Form Search Results panel and will focus on the form you selected. Follow this hyperlink to review features available when [executing a Colleague form](#).

Using Navigate.

You can access the Navigation Panel from anywhere in Colleague UI by pressing CONTROL ALT N.

NOTE: If you have NVDA installed and you have defined the shortcut key at install, CONTROL ALT N will start NVDA. To use this keyboard shortcut for Colleague UI Navigate, you must remove or change the shortcut from Shortcut tab of the Properties for the NVDA shortcut on your desktop.

The Navigation panel provides access to the Colleague menu structure, which you can use to review and access all menus and forms that you have permission to use. Each application available in the current environment is listed. When you open the Navigation panel, the reader will announce there is list and the Colleague application that was in focus the last time you accessed the panel. The active menu tree structure will contain Colleague processes from this application. To change the application selection, press TAB and SHIFT TAB. As you move between applications, the reader will announce the application currently in focus. To open the menu tree for the application currently in focus, press SPACE. Colleague UI will retrieve the menu structure for your selected application. There will be a slight delay before the menu tree is rendered. The screen reader cannot focus on the spinning icon that is shown.

To access Colleague Help for form navigation, press TAB from the last application in the list to focus on the Colleague help for form Navigation button. Press SPACE to open Colleague help for Navigation in a separate browser window. Focus will remain on the help button in the Colleague UI window.

To access the Close Panel button, press TAB when focus is on the Colleague help for Navigation button. Press SPACE to close the Navigation panel. You can also close the panel at any time by pressing ESCAPE.

To focus on the menu tree for the selected application, press TAB when focus is on the Close Panel button. For each node in the menu tree, the reader will read the title and mnemonic of that node. If the node is a menu with more items, the reader will announce collapsed if the menu is closed or expanded if the menu is open. Press SPACE to expand a collapsed menu. Press SPACE to collapse an expanded menu. Use the UP ARROW and DOWN ARROW keys to move among the items on the menu. When you find the Colleague process you want to execute, press CONTROL ENTER to run that process. Colleague UI will close the Navigate panel and execute your selected form.

Finding People in Colleague UI.

Many of Colleague forms are focused on maintaining data about people: students, faculty, employees and others. Since so many Colleague forms focus on person data, Colleague UI provides several ways for you to search for and select people. This section describes the Colleague UI features for searching and selecting people.

Using Person Search History.

You can access Person Search History by using the keyboard shortcut CONTROL ALT 5 when the Search Box is in Person Search mode. Focus will be on the Clear All Person Search History button.

You can open the Person Search History Panel by pressing SPACE or ENTER when focus is on the Show Person History button. The Person Search History dropdown lists all the search strings you have entered for Person Search. Each item is list alphabetically. Focus is returned to the Search box after opening the History panel. Use the UP and DOWN ARROW keys to scroll through the list of history items. When you find the string you are looking for, press ENTER to execute that search. Note that if a search string is selected in the Search Box when you open the Search History panel, only history strings that match the selected string will be listed.

You can access the Person Search History panel to maintain the list of search strings in your history. To access the Person Search History panel, press TAB six times to go through the following focus points: Show Person Search History, Show Person Search Results, Advanced, Log Out, Options Menu. Focus will be on the Clear All Person Search History button.

To clear all search strings from Person Search History, press SPACE to activate the Clear All Person Search History button.

Press TAB from the Clear All button to focus on the Help for Person Search Result button. Press SPACE to open a new browser tab or window for Colleague Help for Search History. Focus will remain on the Help button in the Colleague UI window.

Press TAB from the Help button to focus on the Close Panel button. Press SPACE to close the Person Search History panel and return focus to the Search Box.

Press TAB from the Close Panel button to focus on the first search string in your history list. Focus will be on the button for the first string in your list. Each entry in the list is a pair of buttons, one button for the search string and a button to remove the string from the list. Use the UP ARROW and DOWN ARROW keys to navigate between search string buttons in your history list. Use the TAB and SHIFT TAB keys to move from the search string button to the remove button. To execute a search using a string from your history list, press SPACE when focus is on the button for that string. To remove a search string from your history list, press SPACE when focus is on the remove button for that string. Use TAB to alternate between search string button and remove button. Use the ARROW keys to move between search string buttons.

Using Person Search Results

You can access the Search Results panel from anywhere in Colleague UI by pressing CONTROL ALT R. When the Search Box is in Person mode, this shortcut will open the Person Search Results panel with the results of your last person search.

Whether you entered search strings directly into the Search Box or entered queries using Advanced Person Search, Colleague will generate a list of people who match your entered criteria, and then render the Person Search Results panel. Focus is initially in the Input box. The reader will announce the view for the results, either Card or Grid View, then, Person Search results for, and the criteria you entered for the search, and then the number of results. Focus for the Person Search Results panel is initially in the Input entry box. Unlike Form Search Results, you may select more than one person from the results panel. You have a number of keyboard shortcuts available from this entry box.

The announcement also includes the entry options available for the Input entry box. You can select search results by number or enter a letter to perform a command.

To select a person in a particular row from the Input entry box, enter the number of the row, and then press ENTER.

To select all people in the results set from the Input entry box, enter the letters **F A,** and then press ENTER.

To switch to Card View from the Input entry box, enter the letter **C,** and then press ENTER. Colleague UI will render a dialog box indicating that it is switching to Card View, then will render a confirmation dialog. Press SPACE to close the confirmation dialog.

To switch to Grid View from the Input entry box, enter the letter **G,** and then press ENTER. Colleague UI will render a dialog box indicating that it is switching to Grid View, then will render a confirmation dialog. Press SPACE to close the confirmation dialog.

To jump to and focus on the results in a row from the Input entry box, enter the letter **J** followed by the number of the row, and then press ENTER. The reader will announce the result number, and the person's name and person ID number in a dialog box. To close the dialog, press SPACE to activate the OK button. To select the form in that row, press SPACE to toggle selection. To execute the selected form, press ENTER. Focus will leave the Input box and be on the row you indicated. To return focus to the Input box, You will need to press SHIFT TAB a few times.

To focus back on the Input box from anywhere in the Search Results panel, press ALT eye.

To read the results in a row from the Input entry box, enter the letter **R** followed by the number of the row, and then press ENTER. Colleague UI will render a dialog box that announces the first two fields of the row, usually the person's full name and ID number. The announcement for the dialog box ends with whether the record for that row is selected or not. Focus is on the OK button for the dialog. Press SPACE to close the dialog box.

To read the detailed results in a row from the Input entry box, enter the letters **R D** followed by the number of the row, and then press ENTER. Colleague UI will render a dialog box and announce the view current in use, Grid or Card, the row number, and then list all the fields visible in the view. Field labels are announced when available. The announcement for the dialog box ends with whether that row is currently selected or not. Press SPACE to close the dialog box. Note that if the user's personal information is not available to due privacy concerns, the dialog box announcement will only include a message about the privacy request.

To toggle the selection of a row from the Input entry box, enter the letter **T** followed by the number of the row, and then press ENTER. Colleague UI will render a confirmation dialog. Press SPACE to close the confirmation dialog.

To enter Sort or Selection criteria from the Input entry box to modify the search results set, enter the letter **S,** and then press ENTER. Colleague UI will render a SELECT PERSON dialog box and focus will be in the selection criteria text box. Enter a valid UniQuery selection clause or sort clause and press ENTER. A valid selection clause for the SELECT on the primary file includes constructs such WITH. A valid sort clause for the SELECT on the primary file includes constructs such as BY. If the select is not valid or finds no matching records, Colleague UI renders an error dialog. Press SPACE to close the dialog and return to the Input box. No changes will be applied to your results set. There are also three buttons on the SELECT PERSON dialog, Submit, Cancel and Help. Submit does the same thing as ENTER from the selection criteria text box. Cancel with close the SELECT PERSON dialog and return focus to the Input box with no changes to your result set. Help will open Colleague Help for Search Results in a new browser window.

To export the result set to Excel from the Input box, enter the letter E. Colleague UI will render a transient Search result export proceeding. Please wait.dialog, then render a Open / Save File dialog. Focus will be on the Close button. The message for the dialog includes the temporary Excel filename to down load and the message Right click the "Download" button and choose "Save As" to save the file. Click "Close" when you are done. To focus on the Download button, press SHIFT TAB. To start the download sequence, press SPACE when focused on the Download button. The download sequence will differ depending on your browser. When finished with Excel, focus in Colleague UI will still be on the Download button. Press TAB to focus on the Close button, then SPACE to close the Open / Save File dialog. When the dialog closes, focus will be in the browser's tool bar. Press TAB until focus is back in the Colleague UI main page, then press ESCAPE to close the Search Results panel.

To review a list of available command shortcuts from the Input entry box, enter a QUESTION MARK, and then press ENTER. Colleague UI will render a dialog box that describes the input options available for the Input box. Press SPACE to close this dialog box.

From the Input Box, you can navigate to other areas of the Person Search Results panel. When a search result is selected, press TAB for focus on the Open Selected Records button. Press SPACE to open the selected person in the Context Area. Follow this hyperlink to read more about the Context Area. Press TAB from the Input Box when no person is selected, or from the Open button, to focus on the Search Results Help button. Press SPACE to open a new browser

window for Colleague Help for Search Results. Focus will remain on the Help button in the Colleague UI window. Press TAB from the Help button to focus on the Close Panel button. Press ENTER to close the Person Search Results panel and return focus to the Search Box.

You can navigate directly in the results area of the Person Search Results panel. Press TAB from the Close Panel button or use the J command from the Input box to access the results area. Use the following shortcuts to navigate in the results area.

To move up one row in the list of results, press the UP ARROW key.
To move down one row in the list of results, press the DOWN ARROW key.
To move down one page in the list of results, press the PAGE DOWN key. Colleague UI will render a dialog confirming the page navigation. Press SPACE to close this dialog.
To move up one page in the list of results, press the PAGE UP key. Colleague UI will render a dialog confirming the page navigation. Press SPACE to close this dialog.
To move to the first row in the list of results, press the HOME key. Colleague UI will render a dialog confirming the page navigation. Press SPACE to close this dialog.
To move to the last row in the list of results, press the END key. Colleague UI will render a dialog confirming the page navigation. Press SPACE to close this dialog.
To close the Person Search Results panel without selecting a person, press the ESCAPE key.

Remember that you can select more than one person from Person Search Results. If you press SPACE to toggle the selection of the current person, Colleague UI will render a confirmation dialog. Press SPACE to close this dialog. To select more than one person, press CONTROL SPACE to toggle the selection of the current person and keep other people selected. To open the selected person or people in the Context Area, press ENTER. Navigate between cards on the page using the UP ARROW and DOWN ARROW keys. Using the PAGE UP and PAGE DOWN keys will navigate between results pages.

The results area has two views, Card View and Grid View.

In Card View, the information for each person in a row is arranged as a mini table with rows and columns. The information in this mini table can be customized by your institution. Focus when entering the results area will be on the first card. When you focus on a result card, the reader will announce the result number, the person's name and ID number, and whether the person is currently selected or not. The reader will also announce Press space bar to toggle selection, and tell you which row has focus and how many rows are on the current page. There are 8 cards per page by default for the Card View of Person Search Results.

In Grid View, information is arranged in a table with columns for each field specified by your institution. Focus when entering the results area will be on the column header for the first column, which by default is the person's name. The maximum number of columns for each result row is 12. Press SPACE to sort the results by the field specified in each column header. Focus remains on the name column header. Press TAB to move between column headers and press SPACE if you want to sort the results by the values in that column.

Press TAB from the last column header to move into the Grid View table of results. For each row, the reader will announce the result number, the person's name and Person ID, and whether the row is selected. The reader will also announce Press space bar to toggle selection, and tell you which row has focus and how many rows are on the current page. There are 20 cards per page by default for the Grid View of Person Search Results. In addition to the navigation keyboard shortcuts listed previously, you can also use RIGHT ARROW and LEFT ARROW to move between columns in a row.

Note that you cannot add new people from Person Search Results when searching from the Search Box in Person Search mode. To add new people, you must first execute a Colleague form that allows adding new records.

After you select one or more people from the Search Results panel, Colleague will add these records to the Context Area as Person Cards. Follow this hyperlink for more information on the Context Area.

Using Advanced Search.

You can press CONTROL ALT A to access the Advanced Search panel from anywhere in Colleague UI.

In addition to searching for people from the Search Box, Colleague has an Advanced Person Search option to help you get more specific search results using predefined search criteria. To access the Advanced Search panel from the Search

Box when in Person Search mode, press the TAB key three times to move through Person Search History, Person Search Results to focus on the Advanced button. The reader will respond with, Advanced. Press SPACE to open the Advanced Search panel.

The reader will read the prompt for the first query field available on the Advanced Person Search panel. The list of query fields is customizable for your site, so the list may differ from the default list of field. The default query fields available for Advanced Search are.

Name
Shared List Name (space to open up the drop-down list)
 Recently Created Shared Lists
Source
Class
Address
City
State
Zip
Country
SSN
Status
Alien ID
Alternate ID

Press TAB to move between query fields on the panel. Enter search values appropriate for each query field you want to use to narrow your Person Search results.

One of the query fields for Advanced Search is Shared List Name. A shared list of people allows you to retrieve a list of people from a previous query. These lists are stored as saved lists in the SAVEDLISTS directory in the Colleague environment. The first focus field for Shared Lists is a dropdown box containing a list of the last ten Shared Lists you have recently created. Press SPACE to expand this list. Use UP ARROW and DOWN ARROW to move through the list. When you find the list you want to use to narrow your search, press ENTER to select it. Press TAB from the dropdown list to leave the field without selecting a list and to focus on the Shared List Name field. Use the Shared List Name field to retrieve an existin saved list, whether your own shared list or another user's shared list. List names are always stored in all upper-case letters, regardless of the case used when the list was created. Shared lists are typically prefixed with the creator's login ID followed by an underscore, then a descriptive name. Enter the shared list name in the field or select the name from the list, and then press ENTER to activate the search. The person records from the shared list are loaded as Person Search results.

When finished entering search values, press ENTER to submit the search. Colleague will open a dialog box and then open the Person Search Results panel with person records that match your search criteria.

Note that Advanced Person Search is valid only for searching for people already entered in Colleague. There is no Advanced Search for forms. If you use the Advanced Person Search keyboard shortcut when the Search Box is in Form Search mode, the Search Box mode will automatically toggle to Person Search mode once the Person Search Results panel is rendered.

Using Person Search Shortcuts

Person Search Shortcuts allow you to enter more complex queries when performing a Person search. These shortcuts are available for use in the Search Box for person searches, as well as during form processing when Person LookUp triggers a person search. You can use a Person Search Shortcut by itself, in conjunction with a search string, or with other Person Search Shortcuts. For example, say you wanted to search for all alumni in the 2 2 0 3 3 zip code with the last name of Smith. The shortcut for Source Code is S and the shortcut for zip code is Z. Since Person Search already understands a string as a name, you can enter the following as the search string:

smith semicolon S A semicolon Z 2 2 0 3 3

In this search string, smith is the last name to search for, A is the source code to search for, and 22033 is the zip code to search for.

Here is a list of the default Person Search Shortcuts delivered by Ellucian. The list may vary for your institution. Each code has a description and the field in the database used for the query.

S	Source	SOURCE
Y	Class	REUNION.CLASS
A	Address	ADDRESS.INDEX
C	City	CITY
S T	State	STATE
Z	Zip	ZIP.INDEX
F	Country	COUNTRY
S S	SSN	SOCIAL.SECURITY.INDEX
P S	Status	PERSON.STATUS
A L	Alien ID	ALIEN.ID
A I D	Alternate ID	PERSON.ALT.IDS

As another example, say your institution uses alternate IDs stored in the PERSON.ALT.IDS field in a person's record. You can access that person easily with the following search string.

semicolon aid 1 2 3 4 5

Note that Person Searches that use shortcuts will always go to Person Search Results.

Options Menu

You can access the Options Menu by pressing CONTROL ALT U from anywhere in Colleague UI.

You can focus on the Options Menu button by pressing TAB key four times from the Search Box to move through Search History, Search Results, the Navigate/Advanced button to focus on the Options Menu icon. Press ENTER to open the Options Menu. You can close the Options Menu without selecting any options by pressing ESCAPE.

Note that you can normally open a panel in Colleague UI using either SPACE or ENTER. For the Options Menu, the panel does not stay open when using SPACE in Firefox. Using ENTER will allow you to access the Options Menu regardless of browser.

There are eight items on the Options Menu. Press TAB and SHIFT TAB to move among the items on the menu. Two of these items are always available.

Preferences. Press SPACE when focus is on the Preferences button to open the Preferences panel. Follow this hyperlink to read more about the Preferences panel.

Clear All Form Scale Values. This option is used in conjunction with the Form Slider to increase and decrease the font size for Colleague forms. When you adjust the font size for a Colleague form, Colleague UI remembers the setting for the next time you use the form. Press SPACE to execute this option. Colleague UI will render a confirmation dialog and announce a confirmation message. Focus will be on the OK button. Press SPACE to clear any stored form scale settings. Press TAB to focus on the Cancel button and press SPACE to cancel your request. Focus will return to the Search Box.

The following option is only available when no Colleague forms are open.

Reload Colleague Session. This option lets you refresh your session with changes that may have been made in the Colleague environment while you are logged in. This feature is used primarily in Colleague development environments. Press SPACE to execute this feature. Return focus to the Search Box by pressing CONTROL ALT S.

Refresh Browser Session. During testing of Colleague UI 5.4, Ellucian discovered a memory leak in the Chrome browser. This reported bug prevented the browser's memory from getting cleaned up correctly when using certain UI features. As a result of the accumulated memory use, performance of the Chrome browser degraded significantly. To help you avoid this issue with the Chrome browser, the Refresh Browser Session option allows you to reset the Chrome browser's memory without having to log out and then log back in. In addition to this link on the Options Menu, Colleague UI also tracks how many times certain features are used during your Chrome browser session. When a usage threshold is

reached, UI will prompt you to reset your browser session. Note this memory issue only occurs in Chrome browser sessions.

The following option is only available on the Options Menu when a Colleague form is open.

Set Form Scale Default. Press SPACE to activate Set Form Scale Default. This option sets the global default scale factor for all forms to the current scale factor. Forms with individual scale factor overrides are not affected by this global default.

The following option is only available on the Options Menu when a Colleague form is open that allows you to delete the primary record on the form.

Record Delete. Press SPACE to delete the record currently active on an open Colleague form. Not all Colleague forms support Record Delete. You can also use Record Delete with the keyboard shortcut CONTROL ALT Z.

The following options are new for Colleague UI 5.4. These features have not yet been made accessible for assistive technology. These features may not be available for the current environment depending on permissions set by your system administrator.

Show Field Sequence. Colleague UI allows you to customize the field sequence on a form so that the tab order of fields reflects your personal needs. This option renders the current field sequence on an open Colleague form. Press SPACE to activate this option. You can also active Show Field Sequence when a Colleague form is open with the keyboard shortcut CONTROL ALT PLUS. Follow this hyperlink to read more about [Customizing Field Sequence](#).

Disable Custom Field Sequence. This option will disable any custom field sequence definitions on all forms in Colleague for the rest of you Colleague UI session. Custom Field Sequence definitions will be used when you next login to Colleague. Press SPACE to activate this option. You can also toggle Disable Field Sequence when a Colleague form is open with the keyboard shortcut CONTROL ALT SEMI COLON. Follow this hyperlink to read more about [Customizing Field Sequence](#).

Customize Field Sequence & Properties. Press SPACE to activate the Customize Field Sequence panel. You can also activate Customize Field Sequence when a Colleague form is open with the keyboard shortcut CONTROL ALT T. Follow this hyperlink to read more about [Customizing Field Sequence](#).

Logging Out of Colleague UI.

You can log out of Colleague from anywhere in Colleague UI by pressing CONTROL ALT L.

The Log Out feature is available as a button on the Main UI panel and the User Menu. Follow this hyperlink to read more about the [User Options Menu](#).

When you logout of your Colleague UI session, your connection to the Colleague environment is also closed. If you have any open forms when you logout, you may be prompted by additional dialogue boxes depending on what state Colleague UI is in when you choose to log out. Some browsers will attempt to close your browser window automatically. You may also be taken a disabled login page with a dialog box that reads Logged Out. Please close the browser window if it is not closed automatically. Your Session has successfully ended. In this case, you will need to manually close your browser window.

Using the Colleague UI Context Area

The Context Area contains information about person records you have selected from a person search. When you select and open person records from the Person Search Results Panel, the selected records are loaded into Person Cards in the Context Area. Person Cards are loaded from Search Results regardless of whether you did a search from the Search box or from a LookUp from a Colleague form.

A Person Card in the Context Area contains information similar to the information in the Card View on the Person Search Results panel. Person Cards let you keep the same people in focus, or in context, while you open and close various Colleague forms. Keeping the same person in context streamlines your work because you can skip the step of searching

for the person each time you switch to a new form. Follow this hyperlink for more information on how Person Cards work with [Person-related Colleague forms](#).

There are several controls available in the Context Area. Some of these controls are only available when there are Person Cards loaded in the Context Area.

Close Context Toggle Button

You can toggle the current state of the Close Context Toggle button by pressing CONTROL ALT O from anywhere in Colleague UI.

When focus is on the toggle button, the reader will announce Specify whether to keep or close all contexts when saving/cancelling out of a form. This only applies to PERSON-related forms, and the state of the button, Auto Close Context or Keep Open Context. Press SPACE to toggle the state of this option.

Use Close Context Toggle Button to change the way Person Cards are retained in the Context Area. For some workflows, you may want the same Person Card in context when executing a series of Colleague forms. In other cases, you may want to maintain information on a Colleague form for a group of people with Person Cards in the Context Area, moving from one person to the next while staying on the same form. Colleague UI supports both workflows by providing the Context Close Toggle Button.

When the toggle button is in the Keep Open state, Person Cards in the Context Area will be kept open even after you exit from a Colleague form. The next Person-related form you execute will use the Person Cards in the Context Area to bypass Person Search required by the form. Follow this hyperlink to read more about [Person-related Colleague forms](#).

When the toggle button is in the Auto-Close state, Person Cards in the Context Area will be closed once you exit a Colleague form. Note that the Person Cards in the Context Area will be closed even if you executed a Colleague form that does not use Context Area cards to populate the form.

When using the TAB key to Navigate the main Colleague UI panel, you can focus on the Close Context Toggle button by pressing TAB key six times from the Search Box to move through Search History, Search Results, the Navigate/Advanced button, the Log Out button, the Options Menu icon to focus on the Close Context Toggle Button. Press SPACE to toggle the current state.

Help for Context Cards.

You can access Help for the Context Area by pressing CONTROL ALT Y from anywhere in Colleague UI, even if there are no Person Cards in the Context Area. This shortcut will open Colleague Help for the Context Area in a new browser window.

When there are Person Cards in the Context Area, the Help for Context Cards button is active. You can focus on this button by pressing TAB from the Close Context Toggle button. Press SPACE to open Colleague Help for the Context Area in a new browser window. Focus will remain on the Context Help button.

View All Records in Context

You can access the View All Records in Context panel from anywhere in Colleague UI by pressing CONTROL ALT 1. This shortcut only works when there are Person Cards in the Context Area.

When there are Person Cards in the Context Area, the View All Records in Context button is active in the main Colleague UI panel. You can focus on this button by pressing TAB from the Help for Context Cards button. Press SPACE to open the View All Records in Context panel.

The View All Records in Context panel shows each Person Card in the Context Area on one panel. This panel allows you to select one or more Person Cards to remove from the Context Area or to add to Favorites. You can also change which Person Card is open as the active card in the Context Area.

Initial focus for this panel is in the Select Number Input box. When you first open the View All Records panel, there are no records selected. In the Selection Criteria box, you can enter a card number, a comma separated list of numbers, or a range of card numbers like 1 – 3.

When you enter a single card number, you can press ENTER to open that Person Card as the active card in the Context Area. You can also choose to remove that card from the Context Area. After entering the card number, press TAB twice to move past the Open button to focus on the Remove button. Press SPACE to remove the Person Card from the Context Area. You can choose to add the person associated with your selected Person Card to your Person Favorites. After entering the card number, press TAB three time to move past the Open button and the Remove button to focus on the Favorites button. Press SPACE to open the Add Person to Favorites panel. Follow this hyperlink to read more about Colleague UI's Favorites feature. Follow this hyperlink to read more about adding people to Favorites.

When you enter more than one card number, you can choose to remove those cards from the Context Area, or to add the people for those cards to your Person Favorites. Since you can have only one active Person Card in the Context Area at a time, the Open button is disabled. To remove more than one Person Card from the Context Area, enter the list or range of numbers in the Select Number Input box. Press TAB to focus on the Remove button. Press space to remove the specified Person Cards from the Context Area. To add more than one person associated with the Person Cards to your Person Favorites, enter the list or range of numbers and press TAB twice to move past the Remove button to focus on the Favorites button. Press SPACE to open the Add Person to Favorites panel. Follow this hyperlink to read more about Favorites.

From the Selection Criteria box, you can also press SHIFT TAB to move focus to the Select All Cards checkbox. Press SPACE to select all the Person Cards currently loaded in the Context Area. Focus remains on the Select All Cards checkbox and the Select Number Input box is disabled. Press TAB once to focus on the Remove button and press SPACE to remove all Person Cards from the Context Area. Press TAB twice to focus on the Favorites button and press SPACE to open the Favorites panel.

Help is also available for the View All Records in Context panel. From the Select Number Input box, press TAB to focus on the Help button. If you have not entered anything in the Select Number Input box, or if you have entered more than one card number, press TAB three times to move past the Remove button and the Favorites button to focus on the Help button. If you have one card number entered in the Select Number Input box, press TAB four times to move past the Open button, the Remove button and the Favorites button to focus on the Help button. Press SPACE to open Colleague Help for the Context Manager in a separate browser window. Focus remains on the Help button in the View All Records in Context panel..

Pressing TAB from the Help button moves focus to the Close button. Press SPACE to Close the View All Records in Context panel. Press CONTROL ALT S to return focus to the Search Box.

Pressing TAB from the Close button moves focus to the first Person Card.

Pressing TAB from a Person Card moves focus to the next Person Card.

You can scroll through the Person Cards using TAB to go to the next card and SHIFT TAB to go to the previous card. As you TAB through the cards, the reader will announce the information on the card as you focus on it. This information includes the card number and whether it is active or not, and the information your institution has chosen to include in a Person Card, such as name, address, and birth date. To select the card in focus, press SPACE. To open a selected card as the active Person Card in the Context Area, use the double click shortcut, or CONTROL ENTER. You can only open one card as the active Person Card in the Context Area.

Person Card

You can focus on the active Person Card in the Context Area by pressing CONTROL ALT W. from anywhere in Colleague UI. NOTE, this shortcut works even if there are no active context cards.

When there are no Person Cards in the Context Area, you can navigate to the Context Area from the Search Box by pressing TAB six times to navigate through Show Search History, Show Search Results, Navigate/Advanced, the Options menu, the Close Context Toggle button and then to the Context Area. When there are no records loaded into the Context Area, a message in the Context Area reads No Active Context. Search for People or open Favorites to get started.

To change focus to the Context Area when there are Person Cards, press CONTROL ALT W. Focus in the Context Area will be the current person's name. Use the UP ARROW and DOWN ARROW keys to move between the lines of information in the current card. The fields that comprise a Person Card are customizable for your institution. By default there are four lines of information in each Person Card. The first line has the person's name and ID number, and a counter for the number of Person Cards currently in the Context Area. Lines two through 4 have data about the person as

defined by your institution. Navigating beyond these four lines using the arrow keys will move focus outside the Context Area.

When focus is on the person's name, press TAB to focus on the Next Card button. Press SHIFT TAB when focused on the person's name to focus on the Previous Card button. Press SPACE for these buttons to move to another Person Card in the Context Area. You can also use the keyboard shortcut

Several Colleague UI shortcut keys are available to use when focus is in the Context Area.

To open a new browser window with Colleague Help for the Context area, press CONTROL ALT Y
To close the current Person Card and remove it from the Context Area, press CONTROL ALT X.
To close all Person Cards and remove them from the Context Area, press CONTROL SHIFT X.
To move to the next Person Card in the Context Area, press CONTROL DOT.
To move to the previous Person Card in the Context Area, press CONTROL COMMA.
To open a dialog box to add the person for the current Person Card in the Context Area to Favorites, press CONTROL ALT V.
To open a dialog box to add all Person Cards in the Context Area to Favorites, press CONTROL ALT 2.
To open a new panel to review all Person Cards currently in the Context Area, press CONTROL ALT 1.

You can choose whether you'd like to keep a person in context or have them close automatically when you save or leave a form. Follow this hyperlink to a description of the Auto-close Context options.

Using the Colleague UI Ribbon Menu

Several Colleague UI features are grouped together for easy access. These features are available as focusable tab stops when navigating the interface. This section describes these features. This menu is also referred to as the Left Navigation bar.

Using Favorites.

You can access the Favorites Panel from anywhere in Colleague UI by pressing CONTROL ALT F.

The Favorites panel allows you to access all people and forms that you have saved as favorites. You can save a person to Favorites using the appropriate shortcut keys from the Context Area. You can add a form to Favorites from Form Search Results or when using a Colleague form.

You can select a form in your Favorites list to open it. In addition to forms, you can also add people to your favorites list and organize them in folders. From your list of favorite people, you can select just one person, multiple people, or an entire folder of people to work with.

The focus points on the Favorites Panel are
Favorites icon
Favorites Help
Close Panel
Favorite People Options button
People Favorites list
Favorite Form Options button
Favorite Forms list

When you open the Favorites Panel with no people in the Context Area and no open forms, focus will be on the Help icon. If you have people in the Context Area or if you have a form open, focus will be on the Favorites icon. Press ENTER to activate the button and open the Add to Favorites dialog. Follow this hyperlink to read more about Adding People to Favorites.

The entries in your People favorites may be a folder or the name of a person. Folders are listed first. To navigate among the entries in your People favorites list, use the DOWN-ARROW and UP-ARROW keys. To open a folder, press the RIGHT-ARROW key. To close an open folder, press the LEFT-ARROW key. To select the current person, press SPACE. To load the currently selected person in the Context Area, press ENTER.

To move to your Form favorites, press TAB. The reader will announce Form Favorites Options Menu. Press TAB again to access your Form favorites list. To execute the current form, press SPACEBAR, and then press ENTER.

NOTE: For UI 5.4 onwards, you must TAB all the through your list of favorite people to get to the Form Options button.

The Favorite People Options button allows you to perform more actions on the entries in your favorite people list. When focus is on the Favorite People Options button, press ENTER to open the options menu. The options in the menu are

Create Shared List. This option allow you tl create a shared list of the currently selected people in your favorites to store in the Colleague environment on the application server. The Create Shared List diaog opens with focus in the Shared List Names entry field. By convention, shared saved lists are prefixed with your login ID. To save a list that can be shared with other users, press END to move to the end of the entry area and enter an identifying string for your list name. Press ENTER to save the lilst. Colleague UI will render a confirmation dialog. Press SPACE to activate the OK button.

Recently Created Shared Lists. Press SPACE on this option for Colleague UI to render a dialog with the last 10 shared lists you have created. Press SPACE to close the dialog. If you have not recently created any shared lists, this option will be unavailable.

Collapse All. Press SPACE on this option to collapse any expanded folders in your People Favorites list.

Expand All. Press SPACE on this option to expand all folders in your People Favorites list.

Rename. Press SPACE on this option to rename the currently selected person entry in you People Favorites list. Colleague UI will render an entry box for the currently selected person with the person's name selected. Type in a new name for this person's entry and press ENTER. This option can come in handy when you would like to list a person in your People Favorites list by a nickname.

Remove Selected People. Press SPACE on this entry to remove the currently select person or people from you People Favorites List. Note that you can select more than one person to remove, and you can select a folder to remove.

The entries in your Form favorites may be a folder or the name of a form. Folders are listed first. To navigate among the entries in your Form favorites list, use the DOWN-ARROW and UP-ARROW keys. To open a folder, press the RIGHT-ARROW key. To close an open folder, press the LEFT-ARROW key. To select the current form, press SPACE. To execute the currently selected form, press ENTER.

The Favorite Form Options button allows you to perform more actions on the entries in your favorite form list. When focus is on the Favorite Form Options button, press ENTER to open the options menu. The options in the menu are

Collapse All. Press SPACE on this option to collapse any expanded folders in your People Favorites list.

Expand All. Press SPACE on this option to expand all folders in your People Favorites list.

Rename. Press SPACE on this option to rename the currently selected person entry in you People Favorites list. Colleague UI will render an entry box for the currently selected person with the person's name selected. Type in a new name for this person's entry and press ENTER. This option can come in handy when you would like to list a person in your People Favorites list by a nickname.

Remove Selected People. Press SPACE on this entry to remove the currently select person or people from you People Favorites List. Note that you can select more than one person to remove, and you can select a folder to remove.

To exit the Favorites Panel without making any selections, press ESCAPE.

You can access the Favorites Panel from anywhere in Colleague UI by pressing CONTROL ALT F.

Adding People to Favorites

Add people from the Context Area to your People Favorites list using the Favorites button in the Context Area. You can also add people to favorites from the View All Context panel, or from the Favorites dialog itself. When you open the Add Items to Favorites dialog box, the people you selected from the Context Area are listed and focus is on the Add button for the dialog box. When adding people to Favorites, you can create a new folder to help organize your Favorites. To create a new folder, press SHIFT TAB to focus on the Create New Folder button, and then press SPACEBAR to activate the

button. A new dialog box will prompt you for, New Folder Name. Type in the name of your new folder and press ENTER. Press ENTER again to add the current list of people to the new folder. Colleague will close the dialog box and focus will return to the Search Box.

The tab stops in the Add Items to Favorites dialog box are listed below. Remember that initial focus is on the Add button.

Folder. List of folders in alphabetical order. Use the UP ARROW and DOWN ARROW keys to navigate between folder names.
Create New Folder button.
Add Items to Favorites button.
Cancel Add to Favorites.

Adding Forms to Favorites

Add forms to your Form Favorites list from Form Search Results. From Search Results, select a form row and focus on the Form Favorites button. Press SPACE to open the Add Form To Favorites dialog. The Add Form To Favorites dialog works the same way as the Add Person to Favorites dialog in the previous section.

Using Colleague Help.

You can access context-sensitive Colleague help from anywhere in Colleague UI by pressing CONTROL ALT H. Many of the panels and dialog boxes within Colleague UI have their own online help. Press CONTROL ALT H to access the help for the current panel or dialog box. Online help for any open Colleague form is also available by pressing CONTROL ALT H.

The Colleague Help menu on the Ribbon menu has several useful options.\

General Help. This option opens a new browser window with general help about Colleague UI.

Process Help. When you have a Colleague form open, this option will open a new browser window with help specific to that form.

Field Help. When you are focused on a field on a Colleague form, this option will open a new browser window with help specific to that field.

List Keyboard Shortcuts. Press SPACE to open a new browser window for a listing of all keyboard shortcuts for Colleague UI. This option is also available by using the keyboard shortcut CONTROL ALT K.

Quick Tour. This link opens a new browser window with a video that describes features and functions of Colleague UI.

About. This link opens a dialog box with version information for Colleague UI. The reader will announce the following information in this dialog: About Dialog, the Colleague UI Version, the Active Sessions for the current user, with the maxmum number of user sessions, the Colleague Version, the Envision Version, the Build Version and Build Date, and whether Secure Sockets (SSL) to Web Services are enabled or disabled. Press ESCAPE to close this dialog.

The following links are delivered for Colleague UI by default. The may be different for your institution.

Client Communities. Opens the Ellucian Community web site in a separate browser window.
User Community Forums. Opens the Ellucian eCommunities web site in a separate browser window. This web site requires a separate login.
Ellucian Documentation. Opens the Ellucian Support Center in a separate browser window. This web site requires a separate login.
Ellucian Support Resources. Opens the Ellucian Support Center in a separate browser window. This web site requires a separate login.

Using User Options

Currently, the User Options Menu has only one option: Log Out.

Using Print Form

Whenever you have a form open use the keyboard shortcut CONTROL ALT P to open your browser's print dialog.

Colleague UI offers a form print button, so you can easily print the current form along with the related context card information. This button is on the Ribbon Menu after the User Options menu.

Using Preferences.

The Preferences panel is available from anywhere in Colleague UI by using the keyboard shortcut CONTROL ALT C. The Preferences panel box available from the Options.   Press TAB to focus on the Preferences Help button. Press SPACE to open a new browser window with Colleague Help for Preferences. Press TAB to focus on the Close Panel button. Press SPACE to close the Preferences panel. Press TAB to focus on the Restore Default Color button. To restore the default primary color for your institution, press SPACE.

The next preference setting is your primary color for your Colleague UI sessions. When focusing on this group of radio buttons, the reader will announce the current color selected and which number in the list it is. There are 9 primary color settings available. The defaul color for your institution is listed first and may be duplicated. Use LEFT ARROW and RIGHT ARROW to move between color options. When your desired color is announced, press TAB to leave the list field.

The preference setting is the Card View combo box. This preference setting slows you to define how many results are shown per page in the Card View of Search Results. Your options in the dropdown box are 8, 20 and 50. Eight is the default.

The preference setting is the Grid View combo box. This preference setting slows you to define how many results are shown per page in the Grid View of Search Results. Your options in the dropdown box are 20, 50 and 100. Twenty is the default.

The next preference setting is the Automatically Close Bar Graph When Finished check box . Select this check box to close the Bar Graph window and return to the UI form when processing is complete. If you leave this option cleared, the Bar Graph window will stay open after processing is complete, and you must close it manually to return to the Colleague UI form.

The next preference setting is the Play Error Sound on Error Messages check box. Select this check box to play an alert sound when an error or other important dialog box is displayed.

The next preference setting is the Verbose Accessibility (screen reader) check box. Select this check box to enable additional accessibility announcements for Colleague UI. These additional announcements are usually dialog boxes that are rendered to deliver informational or confirmation messages.

The next preference setting is the Show Full Page Report Browser View check box . Select thischeck box to display one full vertical page of a report in the Report Browser without scrolling. This option, which is selected by default, sets the preference for each time the Report Browser is displayed, though you can override this option in the Report Browser. The option that is last used in the Report Browser will be used the next time the Report Browser is displayed.

The next preference setting is the Display Person Photos field. This field as two radio buttons. Chose Yes or No for Display Person Photos. If person photos are enabled at your institution, you can turn them on (Yes) or off (No) here for your own user profile. If person photos are not enabled at your institution, or if you do not have security access to view person photos, changing this preference to Yes has no effect.

There are three buttons for the Preferences panel.

OK will save any changes you have made to your preferences settings and close the Preferences panel. Press SPACE to activate this button.

Cancel will discard any changes you have made to your preferences settings and close the Preferences panel. Press SPACE to activate this button.

Restore Defaults will restore all default preference settings . Press SPACE to activate this button. To Save restoring the default settings, press SHIFT TAB twice to focus on the OK button. Press SPACE to activate this button.

Using Colleague Forms.

A Colleague form is the primary way to access and maintain data stored in the Colleague database. Each open Colleague form has a tab in the form area of the Colleague UI window. Some forms deal primarily with person-related information. Follow this hyperlink for more details on person-related forms.

Colleague forms are comprised of fields and tables. A field is any place on the form where data is displayed, or where you enter data. A field can be maintainable or inquiry.

A maintainable field is an entry box that gains focus as you enter it and allows you to change the data for the field. When you use the TAB and SHIFT TAB keyboard shortcuts to move between fields on the form, the TAB order is determined by the maintainable fields on the form. When the field gains focus, the reader will announce the type of field, that the field is maintainable, the name of the field, and any data already defined for the field. If you TAB from the last field on a form, Colleague will enter the processing for the end of the form. Follow this hyperlink for a discussion of end of form processing.

An inquiry field is a text box that displays data without allowing changes to the data. Inquiry fields are not in the default tab sequence for a form and therefore do not gain focus. When an inquiry field is defined on a form in the middle of maintainable fields, the default tab sequence skips over these fields. Colleague UI provides additional shortcuts to allow you to determine the data for inquiry fields.

To have the reader announce all inquiry fields on a form, press CONTROL ALT I.

To move between fields on the form in the order in which they are defined, regardless of whether the field is maintainable or inquiry, use the Access Forward and the Access Back shortcuts. The keystroke shortcut for Access Forward is CONTROL ALT RIGHT BRACKET. The keystroke shortcut for Access Back is CONTROL ALT LEFT BRACKET. As each field on the form gains focus, the reader will announce the type of field, whether the field is maintainable or inquiry, the name of the field, and any data already defined for the field.

Field types include text fields, number fields, date fields, validation code fields or LookUp fields. Text fields are free-form fields that accept any input, such as address lines. Number fields accept numeric input, and you will receive an error message dialog box if you enter anything other than numbers. Date fields accept date data. When entering dates, use the format defined for your institution. You must use one of the following delimiters between the month, day, and year components of the date:

Slash.
Period.
Comma.
Colon.
Semicolon.
Dash.

If you omit the year, Colleague uses the current year as the default. You will receive an error message dialog box if you enter a date in an invalid format.

Validation code fields are fields where the data is limited to a code from a list of valid codes. For example, email address type might have a list of valid codes that includes primary, secondary, business, and school. The email address type field on a form will accept only one of these four values for an email address. Colleague UI uses drop-down boxes to limit the entry of values for validation code fields. As you focus on a validation code field, the reader will announce, Valcode field. If you know the code you want to enter, simply type it in. Otherwise, use the DOWN ARROW key to open up a list of codes. Use the UP ARROW and DOWN ARROW keys to navigate between values in the list. When you find the code value you are looking for, press ENTER to select that code value.

LookUp fields are similar to validation code fields, because they store only values from a defined set of values. Instead of providing a drop-down list of values, however, LookUp fields allow you to search for values and review the results on the Search Results panel. As with Person Search and Form Search from the Search Box, the Search Results panel provides a list of values that meet the search criteria you entered. For example, when searching for a course section, a search string of "MATH 101" will produce a list on the Search Results panel of all course sections for MATH 101. The shortcuts for navigating and investigating values among the list are the same as for Person Search results. Follow this hyperlink to review using Person Search results.

Many forms begin with a LookUp field. A LookUp dialog box allows you to enter your search criteria. There are usually four buttons available for the LookUp dialog box.

OK submits the search string. You can also submit the search string by pressing ENTER.
Cancel cancels the LookUp dialog box and returns to the form.
Finish cancels the LookUp dialog box and exits the form.
Help opens help for LookUp in a separate window.

In order to access the LookUp dialog buttons, use TAB and SHIFT TAB to move between the buttons and the LookUp entry box.

Some forms also have LookUp fields elsewhere on the form. The reader will announce "is a LookUp" field when that field gains focus. When there is no dialog box, simply enter your search string and press ENTER.

Colleague Form Required Fields

Many Colleague forms have data fields that must be filled in. The fields are called required fields. When you focus on a required field, the announcement for that field includes is required. Colleague end of form processing will not allow you to save data on a form is any required field is missing data. If you attempt to save a form when data is missing for required fields, Colleague UI will render an error dialog with focus on the OK button. Press SPACE to close the dialog. Colleague UI will focus on the required field that is missing data.

Colleague Form Windows

Fields can also be grouped in tables, also known as windows. A table can be made up of a single field or a set of related fields. Each field in a table can have multiple values. Furthermore, there are usually several fields in a table that are associated with each other in some way. These grouped fields are often referred to as associated multivalues. Each multivalued field in the table comprises a column. Sets of associated multivalues are presented as rows. The intersection of a column and a row is referred to as an element.

Tables provide access to data one page at a time. A page in a table can contain one or many rows, and the number of rows on a page differs for each table. For example, consider a table that has three rows per page. When first rendered on a form, the table displays rows one through three. The second page of the table would displays rows four through six. Moving between pages in a table shows the next set of rows. The following Colleague UI shortcut keys allow you to move among the pages of a table.

To move forward one page in a table, press PAGE UP.
To move backward one page in a table, press PAGE DOWN
To move to the first row of a table, press CONTROL HOME
To move to the last row of a table, press CONTROL END

Navigation among fields in a table works slightly differently that among other fields on a form. The TAB key moves to the next maintainable field in a row. If the focus is on the last element in a row, pressing TAB will move you to the next maintainable field outside of the table on the form. Similarly, SHIFT TAB will move to the previous maintainable element in a row. If on the first element in a row, focus will move to the previous maintainable field outside of the table.

To move forward one row in the same column of a table, press the DOWN ARROW key or the CONTROL DOWN ARROW key**.**
To move back one row in the same column of a table, press the UP ARROW key or the CONTROL UP ARROW key**.**

Remember that when focused on a validation code field, the DOWN ARROW key opens the list of code values. If the current field within a table has a drop-down list, use the DOWN ARROW key to open the list, the UP ARROW and DOWN ARROW keys to move up and down within the list, and ENTER to select a value. Use CONTROL UP ARROW key and CONTROL DOWN ARROW key to move between table rows regardless of the field type.

The ACCESS FORWARD key works like the TAB key and the ACCESS BACK key works like SHIFT TAB within a table. To determine the value of inquiry fields as table elements in a table row, use the Read Window Row key board shortcut CONTROL ALT HYPEHN. Read Window Row will read column and data information for the current row in the table. Read Window Row will read the row of the window, the element information for each column, and the value of the element. Colleague UI will render this message as a dialog with focus on the OK button. Press SPACE to close this dialog.

When focus is within a Colleague table, you also have the option to export the contents of the table to Microsoft Excel. To export the table data to Excel, press CONTROL ALT E to open up Excel in a separate window.

Detail Forms

Some fields on forms provide access to additional data on a separate form. A Detail field on a Colleague form indicates there is more data concerning the field available by executing another form. When pressed on a detailable field, the function key F2 suspends processing of the current form and opens and focuses on a separate form with additional data. When you are finished working on this subsequent form, focus returns to the form where you started.

When you detail from one form to focus on another, the first form is not closed. Open forms accumulate as tabbed enteries above the form area. To change focus to the previous form, press CONTROL ALT COMMA. Colleague UI will switch focus to the previous form. Note, however, that since processing for the previous form has been suspended, you can't make any changes on the previous form. Use CONTROL ALT DOT to change focus to next form, which should be the active form. You can read the title from the tab of the current form by pressing CONTROL ALT B.

Form-end Processing.

When you are finished working with a form, you have several options to begin exit processing for the form.

To undo all changes and cancel from the current form, press function key F8. This action is the CANCEL action.
To undo all changes and cancel from all open forms, press SHIFT F8. This action is the CANCEL ALL action.
To save all changes and exit from the current form, press CONTROL and function key F9. This action is the FINISH action.
To save all changes and remain in the current form, press function key F9, OR press CONTROL ZERO. This action is the SAVE action.
To save all changes for all open forms and exit all forms, press SHIFT and function key F9. This action is the SAVE ALL action.

NOTE: SHIFT F8 for Cancel All and Shift F9 for Save All may not be available for the Firefox browser. Use CONTROL SHIFT F8 for Cancel All and CONTROL SHIFT F9 for Save All instead.

When you use the FINISH, SAVE, or SAVE ALL actions, or if you press TAB out of the last maintainable field on a form, the form-end processing determines if you have entered data for all required fields and checks for any errors.

When you use the FINISH or SAVE actions, form-end processing will conditionally issue a final prompt. The option to use the final prompt is selected for each individual institution. The final prompt is a dialog box with three options, Update record, Cancel record, or Return to editing. The Update button is in focus when this dialog box is rendered. To save the changes you have made on the form, press SPACEBAR to activate the Update button. To discard the changes you made, press C for Cancel, or press TAB to focus on the Cancel button, and press the SPACEBAR to activate it. To return to the form, press R for return, or TAB twice to focus on the Return button and press the SPACEBAR to activate it.

When you use the CANCEL action, form-end processing will issue a cancel prompt. This dialog box has two options, Cancel record, and Return to editing. To discard the changes you made, press SPACEBAR to activate the Cancel button. To return to the form, press R for return, or press TAB to focus on the Return button and press SPACEBAR to activate it.

When you use the SAVE ALL or CANCEL ALL actions, end form processing will not issue a prompt. Instead, all forms will close and focus will return to the Search Box. SAVE ALL will save all changes you made on all open forms. CANCEL ALL will discard all changes you made on all open forms. Note that if there are any validation errors on any open form, Colleague UI will render an error dialog box with the error, and focus will be on the form with the problem.

Person-related Forms.

Person-related forms are just like any other Colleague form with two important exceptions, Person LookUp and form-end processing.

Person-related forms begin with a Person LookUp field. When you have Person Cards active in the Context Area, the person for the current Person Card is used instead of searching for a person, skipping LookUp and Search Results processing. The form data for the current Person Card is loaded automatically into the form.

If there is no current Person Card, Colleague UI will render a Person LookUp dialog. Focus will be on the LookUp entry box, where you can enter person search strings. The dialog has four buttons, OK, Cancel, Finish and Help.

OK submits the search string. You can also submit the search string by pressing ENTER.
Cancel cancels the LookUp dialog box and returns to the form.
Finish cancels the LookUp dialog box and exits the form.
Help opens help for LookUp in a separate window.

In order to access the LookUp dialog buttons, use TAB and SHIFT TAB to move between the buttons and the LookUp entry box.

After selecting a person from Person Search results, Colleague UI will load the Context Area with a Person card for the person you selected. If you select more than one person from Person Search results, the Context Area will get loaded with a Person Card for each person selected.

Form-end processing has an extra step when there are Person Cards in the Context Area. After the final prompt dialog box or the cancel record dialog box, Colleague will issue the active record dialog box. The reader will announce, Discard button for message. A list of records is active. Discard the entire list, go to previous record, go to next record, or jump to a record? Press the SPACEBAR or the letter d to discard all Person Cards. Press the letter P to move to the previous Person Card. Press the letter N to move to the previous card. Press the letter J to open a dialog box prompting for the record to jump to. When you are on the first Person Card, there is no previous button. When you are on the last Person Card, the next button will move to an empty Person Card and you will be prompted for Person LookUp.

SAVE ALL and CANCEL ALL will close the form without prompting. The Context Close Toggle Button determines what happens next. Follow this hyperlink to read more about the Context Close Toggle Button. If the toggle button is not active so that the setting is Auto-close Context, all Person Cards in the Context Area will be discarded. If toggle button is active so that the setting is Keep Context Open, all Person Cards in the Context Area will remain open.

Using Colleague Batch and Report Processes

When using Colleague forms, you are typically working on a single primary record and a group of associated records. For Colleague batch and report processes, you are working on many records at the same time. Batch processes typically perform operations to change the data on many records at the same time. Report processes produce formatted datafor many records in a selected group.

Batch and report processes typically have a front end form that allows you to enter criteria to narrow the selection of records to process. These front end forms are Colleague forms, so the features and functionality describe in the Using Colleague Forms section are available. Follow this hyperlink to read more about Using Colleague Forms. Once you have entered the criteria you want to use for limiting the process's selection, you can exit the front end form using the same options as any other Colleague form. Follow this hyperlink to read more about Form-end Processing.

Most batch and report processes have other forms to which the process flow automatically chains. These forms include the Additional Selection Criteria form, the Output Destination form, and the Background Processing form.

The Additional Selection Criteria form allows you to enter more criteria to limit the selection of records for processing by the batch or report process. Not all batch and report processes execute this form, but when executed, this form allows you to enter query like criteria to limit the selection of records. These optional query by example criteria allow you to finely tune the selection of records for processing.

A more commonly executed form in the workflow of a batch or report process is the Output Destination form. This form allows you to direct any output of the process to one of several options defined for the Colleague environment. These options can include sending output to the HOLD file, to a printer, or to an email address. The options in the valcode field that has focus on entry to this form will be unique for your institution. A common option is to send the output to the HOLD file in order to view the results using the Report Browser. Follow this hyperlinkg to read more about the Report Browser.

Another common form in a batch or report process workflow is the Background Processing form. The first prompt on this form asks Execute in Background Mode? Answering Yes to this prompt will route processing of the batch or report process to the background, also known as a phantom process. Background processing starts a separate session for the execution of the batch or report process so that your current session is not dedicated to process execution. Phantom processing is most useful when generating lengthy reports, printing at a future time, or executing a time-consuming batch program.

Once you have executed all the chained forms in the process workflow, batch and report processes typically provide an indicator of the progress of execution called the bar graph. Your screen reader should read progress announcements based on the percentage of record processed. Once processing has completed, there are three ways to close the bar graph dialog box. In the Preferences dialog, there is a setting to Automatically Close Bar Graph When Finished. The bar graph dialog will close upon completion of processing when this setting is selected. Ellucian recommends you choose the Preference setting. Follow this hyperlink to read more about Using Preferences.

The second way to close the Bar Graph dialog is to select the Close automatically when complete check box on the Bar Graph dialog. A bug in Colleague UI 5.4 prevents easy focus on this checkbox. Use the Preferences setting describe above instead.

The third was to close the Bar Graph dialog is to Use the Finish button on the Bar Graph dialog. A bug in Colleague UI 5.4 prevents easy focus on this button. Use the Preferences setting describe above instead.

For some batch and report processes, errors during processing get reported on the Batch Error Report form. Use Detail to view specific errors in the window.

Any output directed to the HOLD file for a batch or report process run in the foreground will be rendered in the Report Browser. The initial focus of the Report Browser is the page input box in the header of the dialog, with the current page number selected. When the report is focused on a page other that page one, SHIFT TAB will move focus to the Previous Page Button. SHIFT TAB will move focus to the First Page button. From the page input box, the TAB stops are Next Page button, Last Page button, Save As button, Export PDF button, Print Remote buttonPage View link, Report Browser Help link, Close Panel link, and the report text area.

The Save As button opens a dialog that allows you to save the rendered report to a file on your PC, if download is enabled for the environment.

Export PDF opens the Export to PDF dialog, which allow you to create a PDF file version of the rendered report.

Print Remote opens the Output Destination form to allow you to select the appropriate output device to send the report to.

The Page View link toggles the view of the report text window from Full Page View to Default Page View.

The Report Browser Help link opens a new window with documentation on the Report Browser.

The Close Panel link closes the Report Browser dialog.

The report text area renders the contents of the report. Use UP ARROW and DOWN arrow to focus on a line in the report. The screen reader reads each line in focus. Use the PAGE DOWN key to move to the top of the next page. Use the PAGE UP key to move to the top of the previous page. Use the HOME key to move to the top of the first page. Use the END key to move to the top of the last page. Use the ESC key to close the Report Browser.

Using Custom Field Sequence.

Custom Field Sequence for a form allows you to tailor the field order and field properties of a form, if allowed for your institution. Among the customizations that can be made for a form are:

- Change the tab order for fields on the form
- Change which field is the first field or the last field on a form
- Change the access – required or inquiry – to a field on a form

The emphasis for Custom Field Sequence for UI 5.4 was to implement the feature as implemented for UI 4.x. This implementation is very visual, like the UI 4.x implemention, and therefore is not readable in a useful way by assistive technologies. Ellucian is currently working on a solution that is more accessible.

Options for Launching Colleague UI

Depending on the implementation at you institution, the initial Colleague UI page will be either a launch page or the Colleague UI login page. When accessing Colleague UI from the launch page, the reader will announce the web address for the page and then the link the launch Colleague UI. Press ENTER to activate the link to access Colleague UI. A new headless window will open for the Colleague UI login page. The reader will announce the title of the window, which includes the environment to which you connect after login.

Alternately, the initial Colleague UI page is the login page. In this case, the reader will announce the web address for the page and the title of the browser tab, which includes the environment to which you connect after login.

For both launch options, focus on the login page will be in the field for entering your user ID.

Enabling Additional Colleague UI Accessibility Features

Screen readers need to be able to focus on a web page component in order to read the text associated with that component. There are certain cases in Colleague UI where the interface needs to have the reader read text when there is no component on which to focus. In these cases, Colleague UI will render a dialog box with the message to read. By default, these additional dialog boxes are disabled.

To enable these additional message for screen readers, follow these steps.

1. After loggin in to Colleague UI, use the CONTROL ALT C keyboard shortcut to access the Preferences panel.
2. TAB through the first nine tab stops on this form until focus is on the Verbose Accessibility (screen reader) checkbox.
3. Press SPACE to check this box if unchecked.
4. Press TAB three more times until focus is on the OK button.
5. Press SPACE to select OK and save your changes. Focus will return to the Searach Box.

Colleague UI Keyboard Shortcuts.

UI Feature Shortcuts

The following shortcuts are available from most places in UI.

Note: Some keyboard shortcuts have changed as of UI 5.1. Please review this list carefully.

Note: Some of these shortcuts may not work in all browsers. Browser plug-ins or other applications may override these shortcuts and activate different commands.

- Change focus to Search Box: **CONTROL ALT S**

- Toggle between Person and Form search in the Search Box: **CONTROL ALT S**

- Show Search Results dialog box: **CONTROL ALT R**

- Show Advanced Person Search dialog box: **CONTROL ALT A**

- Show Navigation dialog box: **CONTROL ALT N**

- Show Preferences dialog box: **CONTROL ALT C**

- Show the Settings menu: **CONTROL ALT U**

- Exit/Logout: **CONTROL ALT L**

- Show Favorites dialog box: **CONTROL ALT F**

- Show Help (for current UI area in focus): **CONTROL ALT H**

- Show the Help menu: **CONTROL ALT FORWARD SLASH**

- Show Keyboard Shortcuts: **CONTROL ALT K**

- Show the Quick Tour video: **CONTROL ALT Q**

- Close an open dialog box (and return to the Search Box): **ESC**

- Move to the beginning of the current input area: **HOME**

- Move to the end of the current input area: **END**

- Move to the next focus spot: **TAB**

- Move to the previous focus spot: **SHIFT TAB**

Context Area Shortcuts

The following shortcuts are for working with records in the Context Area:

- Toggle Context Keep Open/Auto Close: **CONTROL ALT O**

- Show Context Area help: **CONTROL ALT Y**

- View all records in Context Area (card selector drop-down): **CONTROL ALT 1**

- Close current record in Context Area: **CONTROL ALT X**

- Close all records in Context Area: CONTROL **SHIFT X**

- Add current record in Context Area to Favorites: **CONTROL ALT V**

- Add all records in Context Area to Favorites: **CONTROL ALT 2**

- Go to next record in Context Area: **CONTROL DOT**

- Go to previous record in Context Area: **CONTROL COMMA**

- Change focus to the Context Area (works even if no active context card is displayed): **CONTROL ALT W**

- Change focus to a UI form (places focus in the last field that previously had focus; only works if a form is open): **CONTROL ALT HOME**   NOTE: A defect in UI 5.1 prevents this shortcut from working correctly. To focus on an open form, press F8, the Cancel Form shortcut, then TAB to focus on the Return button in the Cancel dialog. Press SPACE to return to the form and focus on the last field that has focus.

Colleague Form Shortcuts

The keyboard shortcuts listed below are available only when working within a UI form or when a form is open (alternative keystroke combinations are separated by |).

Note: Some of these shortcuts may not work in all browsers. Browser plug-ins or other applications may override these shortcuts and activate different commands.

Field Movement Shortcuts

- Move to the next field: **TAB**

- Move to the previous field: **SHIFT TAB**

- Move to the beginning of the current field: **HOME**

- Move to the end of the current field: **END**

- Open a drop-down list to select a value: **DOWN ARROW**

- Scroll through the values in a drop-down list: **UP ARROW and DOWN ARROW**

- Select the highlighted value in the drop-down list: **ENTER**

- Detail: **F2**

Envision Table Shortcuts

- Move forward one row in a table: **DOWN ARROW***

- Move back one row in a table: **UP ARROW***

- Move forward one page in a table: **PAGE UP**

- Move backward one page in a table: **PAGE DOWN**

- Move to the first row of a table: **CONTROL HOME**

- Move to the last row of a table: **CONTROL END**

- Field insert in a table: **INSERT**

- Field delete in a table: **CONTROL ALT D**

- Export table contents to Excel: **CONTROL ALT E**

*If the current field within a window has a drop-down list, use Down Arrow to open the list, **UP ARROW and DOWN AROOW** to move up and down within the list, and **CONTROL UP ARROW** or **CONTROL DOWN ARROW** to move back or forward one row.

Form Shortcuts

- Save current form: **F9** | **CONTROL 0** (zero, not the letter o)

- Save all open forms: **SHIFT F9**

- Cancel from current form: **F8**

- Cancel from all forms: **CONTROL ALT END**

- Finish from current form: **CONTROL F9**

- Move to the next form: **CONTROL ALT DOT**

- Move to the previous form: **CONTROL ALT COMMA**

- Add current form to Favorites: **CONTROL ALT 4**

- Record Delete (when allowed): **CONTROL ALT Z**

- Print active form: **CONTROL ALT P**

Help: **CONTROL ALT H | F1** (shows help for area currently in focus; **F1** may not work in all instances)

Search Results Shortcuts

Person and Other Search Results

The keyboard shortcuts listed below are available only when working within a Search Results Panel that is **not Form Search**:

- Select all records: **FA**
- Add a new record, if available: **A**
- Jump to page containing result number *n:* **J** *n*
- Enter sort select criteria, if applicable: **S**
- Switch to Card View: **C**
- Switch to Grid View: **G**
- Export results to Excel: **E**
- Read key for result number *n:* **R** *n*

- Read details for result number *n:* **RD** *n*
- Move to the next page of results: **PAGE DOWN**
- Move to the previous page of results: **PAGE UP**
- Move to the first page of results: **HOME**
- Move to the last page of results: **END**
- Show these search input options: **?**

Form Search Results

The keyboard shortcuts listed below are available when focused on the Input box for a **Form Search Results** panel:

- Execute result n: n (enter the number)
- Read results row *n:* **R** *n*
- Jump to and focus on result number *n:* **J** *n*
- Move to the next page of results: **PAGE DOWN**
- Move to the previous page of results: **PAGE UP**
- Move to the first page of results: **HOME**
- Move to the last page of results: **END**

Windows Accessibility Shortcuts

The keyboard shortcuts listed below are available when working within a UI form using assistive technology software, specifically JAWS and NVDA. The Access Forward and Back keys allow movement between fields on a form regardless of whether the field is inquiry or maintainable. Access Forward will change focus to the next field on the form as defined by the form's field order. Access Back will change focus to the previous field on the form. When focus is on an Envision window field, the Access Forward and Back keys function as Tab and SHIFT Tab, respectively.

There are two options for reading data in the row of Envision windows. Read Window Row will read column and data information according to the Verbose Accessibility setting in the Miscellaneous section of the Preferences panel. If this flag is checked, Read Window Row will read verbose data, including the name of the window, the column number, the name of the window element, whether the element is maintainable or inquiry, and the value of the element. If this flag is unchecked, Read Window Row reads only the column number and the element value. Elucidate Window Row Detail reads the verbose version of Read Window Row.

Note: Some of these shortcuts may not work in all browsers. Browser plug-ins or other applications may override these shortcuts and activate different commands.

Colleague Form Shortcuts

- Read all Inquiry fields on a form: **CONTROL ALT I**

- Access Forward: **CONTROL ALT RIGHT SQUARE BRACKET**

- Access Back: **CONTROL ALT LEFT SQUARE BRACKET**

- Read Window Row: **CONTROL ALT HYPHEN**

Helpful Keyboard Shortcuts for JAWS
This section to be populated in future versions.

Helpful Keyboard Shortcuts for NVDA
This section to be populated in future versions.

Testing Colleague UI 5

Testing for Colleague UI 5.1 spanned three browsers and two screen readers. The browsers used for testing were Internet Explorer (IE) version 11, Firefox version 52.0.2, and Chrome version 57.0.2987.133. The screen readers used for testing were Job Assistance With Speech (JAWS), version 17, by Freedom Scientific, and NonVisual Desktop Access (NVDA), version 2016.3, from NV Access. Each combination was tested. Here are overall findings from the testing.

Internet Explorer 11.

Freedom Scientific mentions Internet Explorer and Firefox on its products page for JAWS. Previous version of JAWS only supported Internet Explorer. WebAIM (Web Accessibility in Mind) recommends using Internet Explorer for testing with JAWS. Internet Explorer has good support for Accessibile Rich Internet Applications (ARIA) and is among the most popular browsers for accessibility users based on WebAIM surveys. Our testing showed the IE/JAWS combination worked best.

Firefox 52.0.2

While NVDA officially supports Chrome, Firefox and Internet Explorer, it is most commonly used with Firefox. WebAim recommends using Firefox for testing with NVDA. Firefox also has good support for ARIA and is also a popular option among accessibility users. Our testing showed the Firefox/NVDA combination worked best.

Chrome 57.0.2987.133

Testing with Chrome produced mixed results. The interaction between both JAWS and NVDA with Chrome was not as smooth as JAWS with IE or NVDA with Firefox.

Testing Goals

Our testing focused on two main features: navigation and announcements. Our goal was to enable the user to know where focus is in the interface and what actions are available.

Navigation testing assures that a user could move from one focus point to the next in a predictable manner, whether in the main part of the interface or in a Colleague form. Predictability was the key success factor: a user must know where focus currently is and where focus will go when an action is taken. The navigation pattern was tested across all three browsers above to ensure consistency.

Annoucement testing assures that every focus point in the interface has an appropriate announcement for the screen reader to read. Since each browser has different methods for accessing the text to present to the screen reader, our goal was to make the text in the interface as consistent as possible. While what each screen reader actually reads for each focus point may be slightly different, we defined accessibility announcements to ensure you know where you are in the interface. See the next section for how Colleague UI defines the text for accessibility announcements.

Initial testing occurred across all browser-reader combinations. Eventually, however, we focused on the most successful and most popular combinations: Internet Explorer with JAWS and Firefox with NVDA. Automated testing proved unavailable, so manual testing examined each focus point in the interface to ensure you could navigate to it and have the reader recognize it.

Our testers, however, could not possibly learn the screen readers as well as regular users know them, and our developers had to make some assumptions about navigation and announcements. We look forward to your feedback as more expert users to help improve the accessibility features of Colleague UI. Follow this link to learn more about improving Colleague UI accessibility.

Defining Text for Accessibility Announcements.

Since Colleague UI 5 is HTML-based, the interface takes advantage of built-in accessibility features or HTML. Every element that can gain focus has at least a label or a title so that by default the screen reader has something to read. Most static focus elements have tags specifically for accessibility. The World Wide Web Consortium (W3C) has defined accessibility tags as part of its Accessible Rich Internet Applications (ARIA) Suite. Follow this external hyperlink to learn more about how ARIA addresses accessibility challenges.

Compatible browsers use the ARIA tags to interact with assistive technologies like screen readers, providing better support for web page features. The ARIA tag aria-label clearly specifies the text to be read by a screen reader. This tag is used extensively in Colleague UI. Most static focus points in the interface have aria-label tags.

Forms in Colleague UI are dynamically rendered based on specifications sent from the Colleague environment on the application server. Rendered forms are comprised of fields. The two main categories for fields are maintainable and inquiry. Inquiry fields only display data. Maintainable fields allow you to modify the data. Maintainable fields can be separated further into mutually exclusive types, text field, number fields, date fields and code fields. Each of these types of maintainable fields has built-in validation logic associated to them. Maintainable fields can have three other features, Required, LookUp and Detail. A maintainable field can have none, one or all three of these features. A required field must have data filled in before you can save your work on the form. LookUp allows you to search for a specific value, usually the key to another file. Detail allows you to access additional information on a separate form. For each field on a form, Colleague UI will build an announcement for the screen reader that includes the name of the field, the category, type and features of a field, and any data that is already defined for the field.

Making Colleague UI Accessibility Better

The current discussion boards and feedback mechanisms for Ellucian do not meet accessibility standards for submitting suggestions. We are currently working on developing a procedure for you to provide us with your valuable feedback. As users of screen readers and other accessibility tools, you are the experts and we value your tips, tricks, suggestions and feedback to make Colleague UI more usable for you and your colleagues.