

Logging In

Online via a web browser at <http://colleagueui.sva.edu>

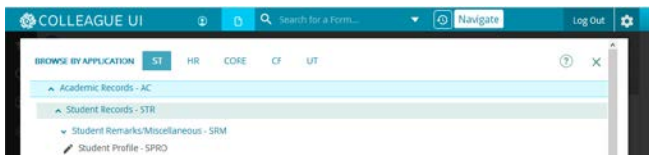
UI FAQ UI 5 Quick Tour

Your Colleague user name and password are the same as for MySVA Portal.

Navigating

Navigation Panel

Click the button to open the Navigation Panel.



Click to expand the folder structure. Double-click the desired mnemonic.

Search Area

Form Search: Type in mnemonic or form partial name

Person Search: type SVA ID or look up by name

Click on the (Search for a Person) button or the (Search for a Form) button to switch between the two searches.

Context Area

When performing direct Person Search, the person record will open in the Context Area

Use the button to keep or close all contexts when saving or cancelling out of a form. This only applies to PERSON-related forms.

To close context click button.

Performing Tasks

Save & Cancel current form.

Save All & Cancel All Saves or cancels all changes to every open form.



- increase and decrease font size for Colleague forms.



- print form from your screen



- add to your Favorites

Log Out

Exit Colleague UI.

Using Lookup

Simply enter the ID or key at the Lookup prompt if you know the record you need, otherwise look up by name – Click OK.

Enter records to select in the format 1 or 2-4 or FA to select all records then click open or double click record to open.

Input Open

To scroll between records click

To close Search Results click

Basic Lookup Shortcuts

The "at" Sign (@)

Brings up the last record you accessed during the current login session. Clears after you exit the session.

The ellipse (...)

Lists ALL records for the appropriate line on the form. **Cannot** be used on a Person lookup.

Advanced Person Search

Switch to Person Search and


click the button to open the **Advanced Person Search** window. To view the people in a Savedlists in Context Area, enter the name of a preselected Savedlist with Person IDs in the Shared Lists Name box then click Search.

All records from the Savedlist will be displayed in **Search Results**.

Export to Excel

Click on the table field to activate the table controller



It will appear at the top of a UI form, select the  button to export all rows of data to a Microsoft Excel spreadsheet.

Printing Reports

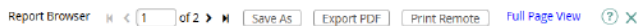
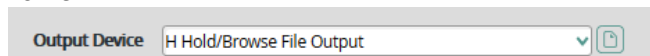
Report Browser

To select printing option click “Print Remote.”

To print to a printer directly from Colleague

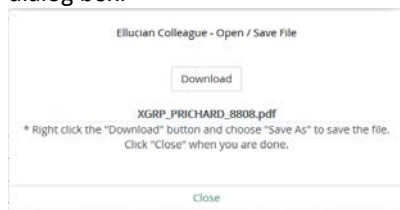


To view:



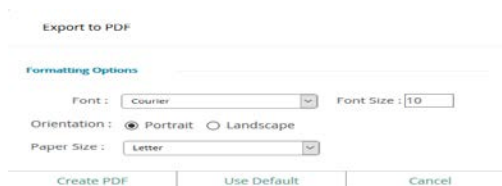
Options:

Save As- Opens the **Ellucian Colleague Open/Save File** dialog box.



Right click the “**Download**” button and choose “**Save Link As**” to save the report to your PC.

Export PDF – save to your PC as PDF for storing or printing from your PC





For most reports – choose Orientation: **Landscape**; Font Size: **8.0**


Click on “**Create PDF**” to open the **Ellucian Colleague Open/Save File** dialog box to save the PDF report.


Print Remote – takes you back to selection printing option to print directly from Colleague.

History and Personalization

Click the  button to open “**Favorites**”, the place holder for your frequently used Forms or People. To add to

favorites click on  when on the person in context area or on the form.

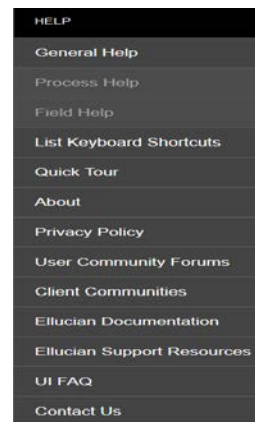
Click the  button to display a list of recently accessed records in the **Search Results**.

Use the  button to access **Preferences** to change layout and colors.

Getting Help

Internal System Help

Click on  to get Colleague UI internal help.



Field Help - info about a highlighted field and field name

Process Help - basic overview of the process

Quick Tour – video with UI features and functions

List Keyboard Shortcuts – listing of keyboard shortcuts

About – version information for Colleague UI

UI FAQ – quick help on Colleague UI

More Information

Refer to UI FAQ and UI5 Quick Tour on the Colleague UI login page and the Colleague UI help menu.

Additional user resources are available online on MySVA (<http://my.sva.edu>) -Departments-Colleague Computing Services website.

For support, contact Helpdesk at x2400 or email helpdesk@sva.edu.