

# INTRO TO DATATEL

## BASICS OF THE USER INTERFACE (UI)



**"ALL THE TOOLS YOU'LL NEED."**

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## INTRODUCTION TO USING THE UI IN COLLEAGUE/DATATEL

Switching to the newest UI (User Interface) in Datatel will be a colorful experience. For those with Windows XP on their computer, the look is quite bright and lively. There are several differences in the UI that will take a little time to get used to.

In this booklet you will be introduced to the following helpful areas:

- **Logging In**
- **Navigation**
- **Description of a Datatel Form**
- **Standard LookUp Shortcuts**
- **Viewing Online Help**

### Procedure for Logging into UI Desktop

Complete the following steps to log into UI Desktop.

**Step 1.** To display the Login dialog box, double-click the desktop icon.



The Login dialog box is displayed, as shown below

A screenshot of the 'Datatel Login' dialog box. The title bar is blue with the text 'Datatel Login'. Below the title bar, the text 'Enter a User ID, Password and Database:' is displayed. To the left of the input fields is a small image of a classical building with columns. There are three input fields: 'User ID:' containing 'hccuser', 'Password:' containing a series of black dots, and 'Database:' containing 'collive' and a small blue downward-pointing arrow. At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'.

Drop down display of active accounts such as live or testing

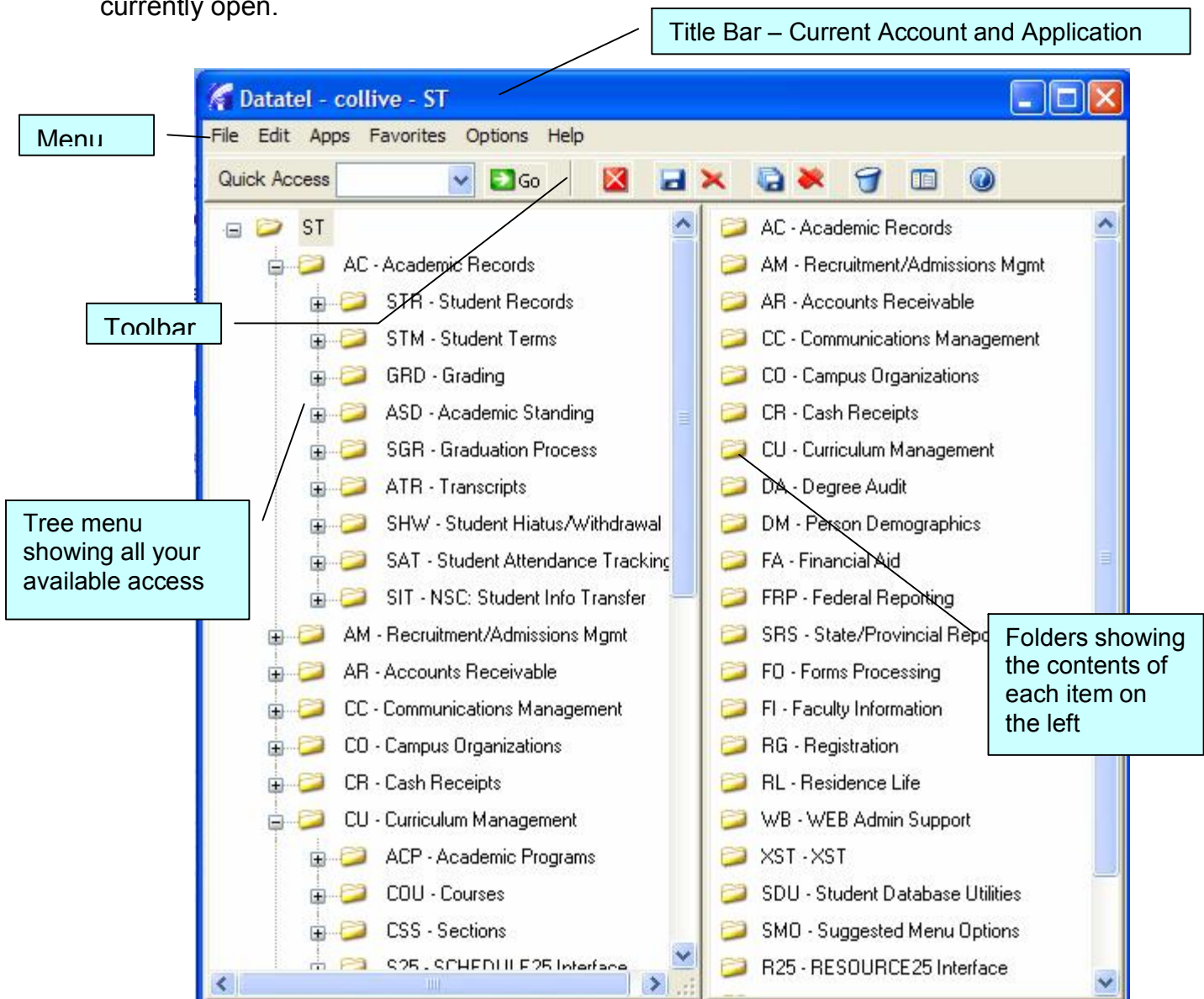
**Step 2.** Enter your user ID, password, and database.

**Step 3.** Click **OK**.

## Navigation Features of UI include:

- Tabbed multiple forms managed within the same window.
- Detail buttons next to fields that have additional information.
- Windows Explorer-style tree structure for process menus.
- A “Favorites” feature enabling quick access to commonly used processes.
- An address bar for launching specific processes with a mnemonic.
- A drop-down box next to every field that has validation codes.
- A calendar button next to every date field.
- A calculator button next to every numeric field.

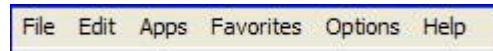
The UI Desktop window, shown below, contains all the processes you use while working with Colleague/Datatel as shown through the UI Desktop interface. The following sections describe the functional areas of the window. The window includes several components, such as the title bar, menu bar, address bar, toolbar, and any Datatel forms that are currently open.



## Menu Bar

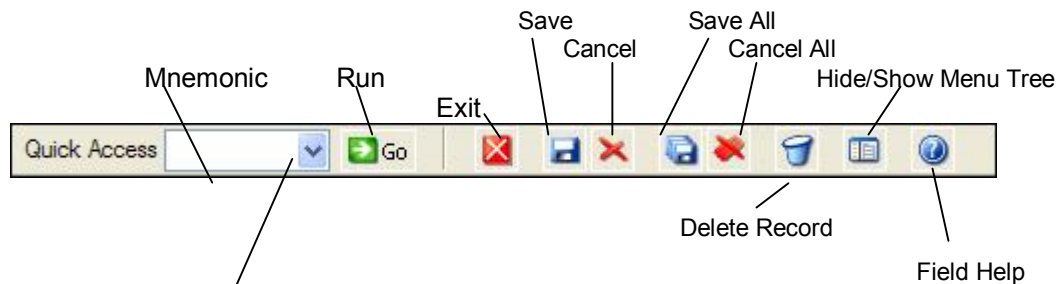
The menu bar, shown below, enables you to do the following:

- Perform routine tasks such as save your work or cut and paste items.
- Choose an application with which to work; for example: the Student, Financial or the Human Resources System.
- Choose a form in which to work.
- Define your preferences for how forms are displayed.
- Access online help.



## Toolbar

The toolbar, shown below, provides easy access to common functions, such as saving your work, canceling changes, deleting records, and accessing online help.



## Quick Access

The Quick Access field enables you to access any form directly by entering its mnemonic, or by using the **drop-down menu** button to select a recently used mnemonic. Press **ENTER** or click **Go** to display the selected form.

## Record Delete

The Record Delete button is used to delete an entire record, and works only for forms that have been defined to allow this option. When you click this button, you are prompted to confirm that you want to delete the entire record.

## Save and Cancel

The **Save All** and **Cancel All** buttons and the corresponding File drop-down menu options, enable you to save or cancel all of your changes simultaneously to every form that is currently open in this session. The **Save** and **Cancel** buttons enable you to save or cancel changes to the current form.

## Forms/Screens in the UI

Most of your work in Colleague/Datatel is done through what we call **forms**. Many of us still call them “screens.” They are the same thing; Datatel chooses to use the term “form,” however, to keep their terminology consistent with standard Windows usage.





Most of what you do in the Wintegrate system is exactly the same process as in the UI. It just looks different or asks you to access or work with a field a little differently.

**There are some good differences too!** One is the way you can keep several forms open at once all within one process. This is done by tabs like those on file folders. They call attention to what form is contained within, you can work on the top one, and then refer to one behind it without losing any information.

Datatel has provided a great table to explain each area including some shortcuts in which you may be interested. Here are the tables in their entirety.

### Types of Forms

Starting out with your original tree menu where you choose a mnemonic, you will see one large menu with several submenus that are represented by form icons. These forms are represented by four different icons according to functionality. The icons within the folders are described below.

Icon Name	Description of Datatel Form Icons
<b>Maintenance</b> 	<p>Allows you to enter and change data that is permanently recorded in your database; for example, a person’s name and address.</p> <p>NOTE: If your system administrator has given you read-only access to a maintenance form, you will be able to access it in inquiry mode only, even though it displays the Maintenance icon in the tree menu.</p>
<b>Processing</b> 	<p>Allows you to start a program that manipulates a record or group of records behind the scenes; for example, posting a group of transactions to the general ledger.</p>
<b>Inquiry</b> 	<p>Allows you to view information without changing it; for example, the history of a general ledger account. Strictly speaking, inquiry forms are forms that are <i>designed</i> to display information without allowing changes to that information.</p>
<b>Reporting</b> 	<p>Allows you to generate a particular report according to your specifications. For example, today you may wish to see a report on vouchers with a due date two weeks from now, and tomorrow you may decide you want to see the same report for vouchers with a due date four weeks from now.</p>

OK, let's get to looking at one of these very familiar forms so we can see a sample of all these fields and navigation possibilities. A screen that shows many of the features that will be new to you is the **NAE** (Name Address Entry) form. It contains most of the field types, prompts and help icons that you will be using.

Enter the letters NAE in the *Quick Access Mnemonic* field and press Enter or the Go button.

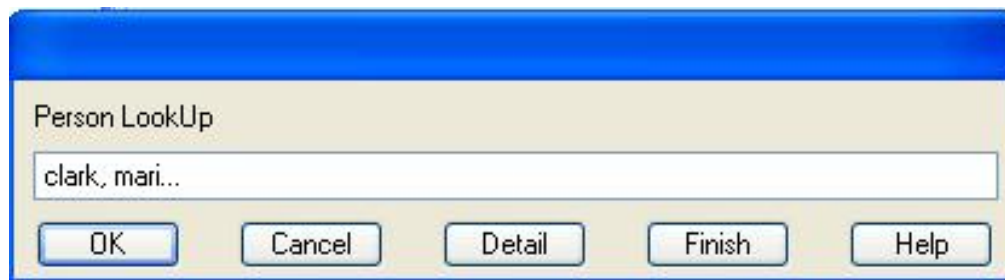


You are presented with one of many types of “Look Up” boxes where you enter some information to help find what you need. In this case, the **ID number** or the name of the person for whom you are looking.

There are several ways you can use the Look Up boxes. Many will save you time searching and even prevent duplicate entries!

On the NAE Person Look Up window, enter the student's Social Security Number. If no record found, you can enter all or part(s) of the name to help your search.

For example, your student's name is Maridru Clark. Type the full last name, comma, then part of the first name, and ellipses (...). Press Enter. If name is not found, click on **FINISH**. This takes you back to the **NAE** screen



In this case, Clark is a very popular name. There are four pages of people whose last name is Clark *and* have an “mari” as part of their first name. Sometimes it is just as easy to type in the full name and get fewer results, but sometimes, depending on the handwritten application or form you are entering, partial names are better.



Here is what the resolution screen or page looks like with a few highlighted areas. We have hidden some of the personal information to protect the innocent!

PERSON Lookup Screen  
using PERSON, View: Combined

Seq	Name	Address	SSN
	ID, Status (Reunion Class)		Entry Date
	Source (Birth Name)	Where Used	Birth Date
9: C1		Lutz, FL 33549	11/16/98
02			
10: C1		Lutz, FL 33549	11/16/98
00			
11: C1		Lutz, FL 33549	11/16/98
02			
12: C1		Lutz, FL 33549	10/15/98
01			


Controller LookUp Resolution Page 3/4  
Seq Number, (F)lag, (V)iew, (S)ort/Select, (A)dd:

If the Resolution screen appears with a name or several names, you must scroll through it and see if the person for whom you are looking is in the database. Place a check mark in the box to the left of the name or the number in the box shown below.

**If you have checked any boxes, you must click the Save icon to continue**

- If you cannot find the person, enter a letter <A> in the text box and press Enter on your keyboard or the blue icon that looks like a data disc.
- If you want to clear all this information and try again, or go to another screen, click the red <X> to get out.

If you are entering information for a new person the following NAE screen appears and requires several fields to be filled before continuing on. Notice the black boxes on the screenshot – they indicate more information about that area is noted below.

When you see a blue detail icon with scrollbar arrows next to it in Datatel  the scroll arrows show the detail icon and will darken when there is more than one entry.

\*\*\*Note – A Red Field indicates one that must be filled in. A gray field in non entry.\*\*

## Multiple Forms Open While in one Process

The NAE form is an excellent example of a form that has many sub-forms or pages that will reside underneath the one on which you are working as a reference tool. Some people call these forms stacked or cascading on one another.

If you click on the Detail button you will get another form to check and perhaps fill out.

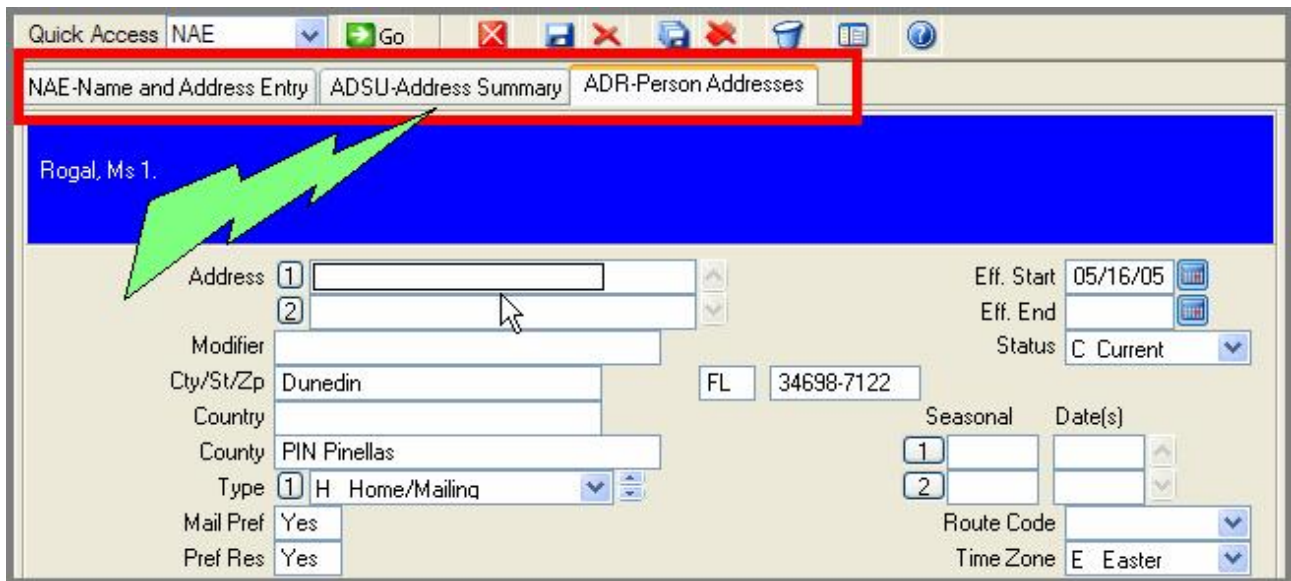
\*\*\*Note the three forms atop one another below.

1. NAE – Name and Address Entry Form
2. ADSU – Address Summary

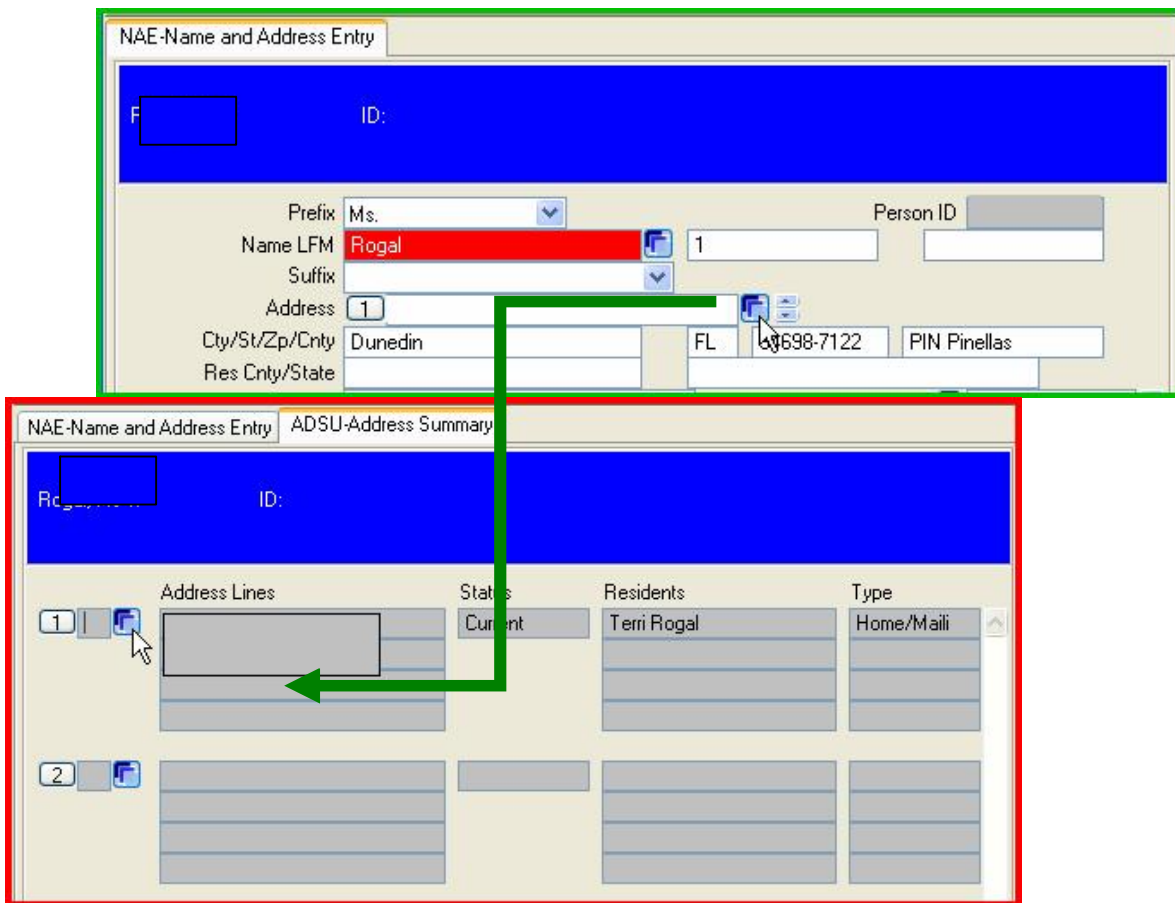


### 3. ADR-Person Addresses

You can only change the one on top, but you may look at any underneath by click on the tab above the blue information block.



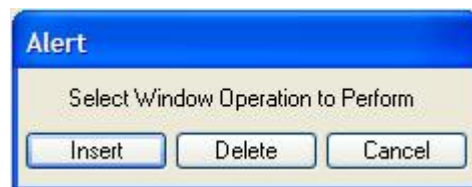
If you click on the Detail Address icon, you get the ADSU form. The NAE remains below.



## Other Buttons, Searches and Fields

The screenshot shows the 'CDMT-Campus Organizations' form for 'Ski Club'. The form includes fields for Description, Type, Purpose, Default Role, Organization ID, Locations, Year Approved, Recharter Date, Max Members, Members/Advisors, Characteristics, Functions, Sponsors, Grouping, and Comments. Several fields have small number buttons (e.g., '1', '2') next to them. Callouts with green boxes point to these number buttons, identifying them as 'Detail Button', 'Date/Calendar Button', 'Calculator Button', 'Drop-Down Table Button', and 'Scroll Buttons'. An arrow points from the 'Comments' field to a red-bordered box containing a note.

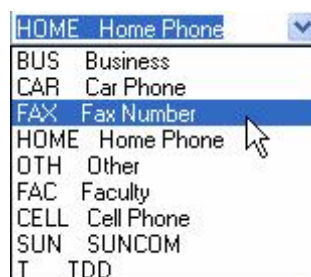
\*\*\* Note: In the UI, if you see field with number symbols ( 1 ) next to it, this represents a possibility of multiple entries. If you see any other number other than "1" you can see the other information by using the drop down arrows or the scroll button arrows. When you click one of the number buttons, the alert box shown below will appear. At this point you may press the Insert line, Delete line or the Cancel button to ignore your request.



**Calendar**



**Drop-Down List**



**Calculator**



**Look**

## Up Shortcuts

There are a number of standard LookUp options available to help you with almost all types of LookUp. There are also many types of Look Up also provide special shortcuts to help you find what you are looking for.

### Standard LookUp Shortcuts

There are several LookUp shortcuts that work with most types of LookUp. LookUp options that do *not* work for person and organization-related Lookups are noted in the “Hints” column below.

***\*\*The tables below are taken directly from Datatel Documentation\*\****

When you want to see...	Enter this at the LookUp prompt	Hints
The last record you displayed during this login session.	An “at” sign (@)  For example, both the Name and Address Maintenance (NAE) form and the Address Maintenance (ADR) form are people-related forms. If you display Fred Smith’s record on the NAE form, and then you access the ADR form, you can retrieve Mr. Smith’s record on the ADR form by entering @.	The “at” (@) sign allows you to retrieve the last form-appropriate record you displayed in most, but not in all cases.
A list of all records appropriate for this form.	An ellipsis (...)	Due to the size of Person and Organization LookUp, the ellipsis is not supported for these files.
A list of fields in the file that contains the record you are seeking.	A semicolon (;)	You can use the field names to construct a query statement to look for a record.

## Person- and Organization-Related LookUp Shortcuts

The information most commonly used to look for a person or organization is the name of the person or organization.

When you want to see...	Enter this at the LookUp prompt	Hints
Search using person's name	<p><b>lastname</b> (at least the first two letters)</p> <p><b>lastname, firstname</b></p> <p><b>lastname, firstname middlename</b></p> <p><b>lastname, firstname middleinitial</b></p> <p><b>firstname lastname</b></p> <p><b>firstname middlename lastname</b></p> <p><b>firstname middleinitial lastname</b></p> <p>For example, to look for or add a new person with the name of Robert Taylor Smith, you could enter any of the following:</p> <p><b>sm</b></p> <p><b>smi</b></p> <p><b>smith</b></p> <p><b>smith, robert</b></p> <p><b>smith, robert taylor</b></p> <p><b>smith, robert t</b></p> <p><b>robert smith</b></p> <p><b>robert taylor smith</b></p> <p><b>robert t smith</b></p>	<p>You must enter an underscore ( <b>_</b> ) between the parts of multiword names. For example,</p> <p><b>van_dyke, jo_anne</b></p> <p>You can also enter only the beginning of the first and last names (at least the first two letters of the last name). For example,</p> <p><b>sm, ro</b></p> <p><b>ro sm</b></p> <p>LookUp finds any record with a primary, birth, former, or other name like the name entered.</p> <p>If you choose to add a new record after looking someone up by his or her name in this manner, then regardless of how you entered the name, each word in the name is transformed into lowercase and then capitalized appropriately; for example, if you enter <b>van_dyke, jo_anne</b>, you would get "Jo Anne Van Dyke."</p>

When you want to see...	Enter this at the LookUp prompt	Hints
Limit a name search.	<p>Enter any of the following after the name:</p> <p><b>;c city</b></p> <p><b>;st state/province</b></p> <p><b>;z zipcode/postalcode</b></p> <p><b>;f country</b></p> <p><b>;y class</b></p> <p><b>;s source</b></p> <p><b>;ps status</b></p> <p>For example, to find the Robert Smith whose preferred address is in Tampa, enter the following: <b>robert smith ;c tampa</b></p>	<p>You can string together more than one restriction for a search, as long as you separate each element of the search with a semicolon.</p> <p>For example, to find the Robert Smith whose preferred address is in Tampa and who is associated with the reunion class of 1954, enter the following:</p> <p><b>robert smith ;c tampa ;y 1954</b></p>
Search using a particular Social Security number.	<p><b>;ss SSN/SIN</b></p> <p>For example, Mary Browning's Social Security number is 264-99-87. If she gives you her Social Security number instead of her ID number, enter the following to look her up: <b>;ss 264</b></p>	You may enter hyphens, but they are not necessary.

## Viewing Online Help

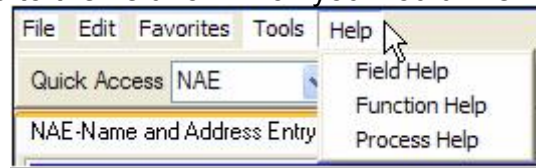
Online help provides you with detailed information about Envision forms. There are three categories of online help:

- **Field Help.** An explanation of each field on each form.
- **Function Help.** A list of frequently used keyboard shortcuts.
- **Process Help.** An overview of each form.

## Field Help

To access field help while working in a form, go to the field for which you would like help, and do one of the following:

- Choose **Field Help** from the **Help** menu.



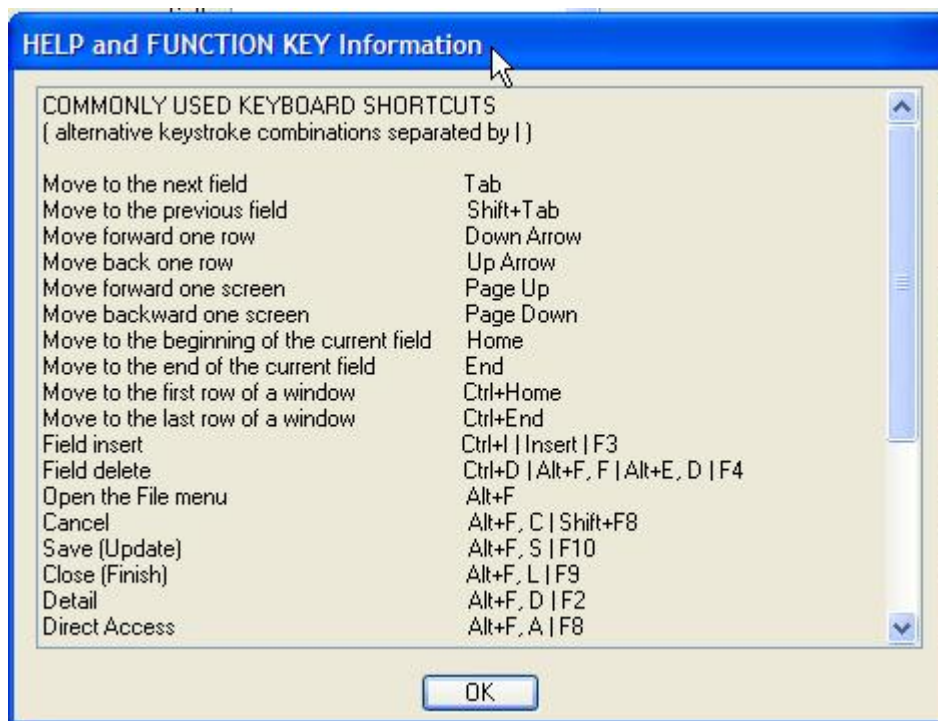
- Click the **Field Help** button on the toolbar.



## Function Help

Keyboard Shortcuts are keystroke combinations that can be used to perform functions that are normally accessed by using the mouse in Windows.

To access a list of frequently used keyboard shortcuts from any location within a form, choose **Function Help** from the **Help** menu. The **HELP and FUNCTION KEY Information** box is displayed, as shown below.



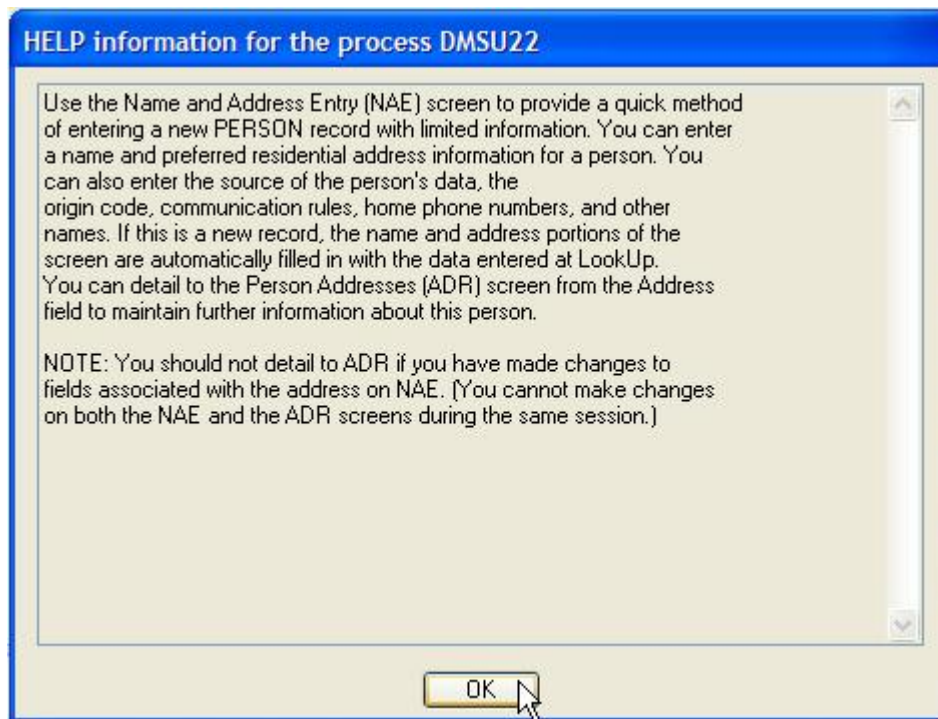


## Process Help

Process help provides you with an overall description of the purpose of the selected form. It does not provide detailed information about specific fields on a form. To access process help from any location within a form, choose **Process Help** from the **Help** menu.



If this window pops up by mistake, or you do not need it, click on the Enough button. If you would like a more in depth explanation of the process on which you are working, press the More button and another window will open.



☑ Click the OK button when you are through. Don't forget to update your work when you need to, Save it or Cancel it if you did not make any changes to a form.

**This ends the Introduction to the UI documentation. Please see individual modules or tutorials for further instruction.**