WHAT IS NEW IN COLLEAGUE UI 4

The core Colleague functionality has not changed.

- Forms/screens remain the same, with small appearance changes.
- Fields within each form, remain the same.
- Processes conducted within the forms and fields will not change.

The changes that you will see within the new UI will be:

- How you access the system.
- Look and feel of the screens.
- New features such as search options, zoom in/out, several simultaneous forms/people.
- Report changes.
GETTING READY TO USE UI 4

- Open Internet Explorer (IE)
  - Supported UI browser is IE version 11

- Go to Tools and then Select the privacy tab

- Remove pop-up blocker (make sure the box is not checked).
ACCESSING COLLEAGUE

- You will be provided a desktop shortcut to access the new Colleague UI 4 environment
- Click on the desktop link
- Log in using your NetID credentials
- The first screen will open suggesting to watch a video. We strongly recommend you watch this Quick Tour provided by Ellucian. It will give you an overview of the new UI 4 environment
SEARCH WINDOW

Person/Form Search Toggle

Enter search criteria here

Advanced Person Search

View /Access recent search items here
Advanced Person Search allows you to search for people based on a variety of attributes. This is essentially the equivalent of the existing “semi-colon” shortcuts. This option can also be used to search for organizations, since they are stored as type of “person” (co-file of PERSON table).
You can use the Navigation tab to look for a specific form or application.
CONTEXT CARD

Privacy Indicator
Card Title Bar
View all Cards in Context
Previous Card
Next Card
Add to Favorites
Person Photo
Privacy Message
Help
Close Context Card
Close Privacy Message
Do not release STUDENT Information
CONTROL BOX

- Export to Excel Button
- Click and hold on "Page" to slide controller
- Click Next Page after last row to add a new row
- Background Toggle Button
- Scroll Buttons
CONTEXT CARDS

- Another new feature is to zoom in or out.

- Most of the information can be exported from the screen using the control bar.

- You can close the students context cards if you are done or keep them open.
SEARCH RESULTS PANEL
You can select one or many records from the search results panel at the same time in different ways:

- Checking the box in front of the number, and then clicking open at the bottom, or
- Entering the number of the requisition on the list (1,2,4,7), or
- Double clicking on top of the record.
CARD AND GRID VIEW

- Grid View displays more results per page than Card View (since photos are not displayed in Grid View).
- In the Grid View, records are sortable by clicking on the column header.
- In the Grid View, columns can be moved to locations by drag and drop.

<table>
<thead>
<tr>
<th>Name</th>
<th>DOB</th>
<th>Address Line</th>
<th>City</th>
<th>State</th>
<th>Zip</th>
<th>Source</th>
<th>DOB</th>
<th>Bin</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Smith</td>
<td>0001234</td>
<td>123 North Main St</td>
<td>Fairfax</td>
<td>VA</td>
<td>20120</td>
<td>Source</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jane Smith</td>
<td>0001235</td>
<td>1234 West Main St</td>
<td>Fairfax</td>
<td>VA</td>
<td>20120</td>
<td>Source</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mary Smith</td>
<td>0001236</td>
<td>1235 West Main St</td>
<td>Fairfax</td>
<td>VA</td>
<td>20120</td>
<td>Source</td>
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<tr>
<td>Tyler Smith</td>
<td>0001237</td>
<td>1236 West Main St</td>
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<td>20120</td>
<td>Source</td>
<td></td>
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</tr>
<tr>
<td>Ryan Smith</td>
<td>0001238</td>
<td>75 West Jefferson St</td>
<td>Los Angeles</td>
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</tr>
<tr>
<td>Thomas Smith</td>
<td>0001239</td>
<td>234 Jefferson Ave</td>
<td>Fairfax</td>
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<td></td>
</tr>
<tr>
<td>Herbert Smith</td>
<td>0001240</td>
<td>7890 Smithfield Ave</td>
<td>Fairfax</td>
<td>VA</td>
<td>20120</td>
<td>Source</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Selected records are highlighted with a triangle marker.
- Click on Column Headers to sort.
- Can drag columns to other locations (left - right).
- Photos are not displayed.
FAVORITES

- You can assign forms or people as favorites.
  - Add your most frequently-used screens as favorite forms, by opening each form, pulling up a record, and clicking on the start. (You must look up something before you can add as a favorite).

- If you work with students or faculty often, pull up the records and add the people as favorites, by clicking on the star in each context card.
If you wish, add folders to either people or form favorites to organize your list.
**SHARED LIST**

- Procedure for creating a Shared List
  - Select one or more persons from the Favorites panel.
  - Using the drop-down menu in the People section, choose Create Shared List.
  - Enter a name for your Shared List. If the name already exists, you will be given a choice to overwrite or cancel.
QUESTIONS

Thank You