Amarillo College
Employee Training

DATATEL COLLEAGUE INTRODUCTION TO ACADEMIC MODULES

Version 4.3

Revision Date: April 13, 2011

Table of Contents

GENERAL INFORMATION

Difference between Colleague and Datatel

- ***Colleague*** is the software package that we use to keep track of all college information.
- ***Datatel*** is the name of the company that created Colleague.

Privacy of Information

- Amarillo College expects you to protect the privacy of students and other employees.
- DO NOT divulge personal information, which you have found by using this software to other people.
- Some employees have sent written requests to the HR Department to withhold information. By doing so, an "**Alert**" window will appear whenever someone views the employee's information stating that information is not to be released.

Licenses

- Amarillo College only has **200 software licenses** for Colleague. That means that the Colleague software will work for only the first 200 login attempts. Even though it is possible to log into Colleague multiple times, AC administration is asking employees to **NOT** do this. We do not have enough licenses for everyone as it is.
- Please do not log into Colleague and leave it logged in all day. Log in when you need it.

Obtaining Permissions to Specific Areas

For security reasons, AC personnel are granted permissions to use only the areas that they need to do their jobs. There are two ways to gain permission to Colleague modules:

1. Attend a training class on the subject for which permission is being sought.
2. Your supervisor may request permissions by filling out this form:
   https://secure.actx.edu/forms/access_request.htm
   and then following the directions at the top of the screen.

Getting Help

- HelpDesk (ext. 5100) or Email them at TIC@actx.edu

- Call or email Charles Hendrick, Technology Trainer for the Center for Teaching & Learning (CTL). His phone number is 345-5540.

Concurrent Sessions

Always use the Logout icon when you are finished with Colleague. If your system locks up and you have to restart, or you close the window without using the Logout button, you use one of your "login sessions." You only get two. If the second one is used, you won't be able to log in to Colleague again until one of the programmers kills your session. Just call HelpDesk to let them know you can't log in.

FIRST-TIME USERS

If you click on the **Begin** button, but nothing happens, your pop-blocker is preventing the Colleague window from opening.

Adding the Colleague Site to your Pop-up Blocker List:

Internet Explorer

(As of August 16, 2011, Datatel has still not validated the use of IE 9. Therefore, we may have problems if we use this version of IE)

1. Tools / Pop-up Blocker
2. Pop-up Blocker Settings
3. Type the web address into the top field and then click Add
4. Close

Firefox

1. Tools / Options
2. On the **Content** tab, click the Exceptions... button associated with "Block pop-up Windows"
3. Type the web address (shown on the next page) into the field and click Allow
4. Close
5. OK

Logging in to Colleague

1. Use a web browser such as Internet Explorer or Firefox to open one of the following webpages:

   https://uilive.actx.edu (live system)

   or, for the training class ONLY:

   http://uitest.actx.edu:8084/test/index.htm (test account)

2. Type your **Colleague User ID**
   a. Old format: (first 5 characters of your last name, dash, first and middle initials).
   b. New Format: (initial of your first name, followed by your employee id number)

3. Type your **Colleague Password**
   a. Default password: (initial of your first name, the initial of your last name, followed by the last four digits of your SSN).

   NOTE: *First Time Users have to create a new password.* ***Password rules***:
   a. Has to contain 7-8 characters
   b. Must contain at least one alphabetic character AND at least one number
   c. Cannot contain extra characters such as a hyphen or underscore or #,@,!,&,^,%
   d. Cannot contain your username

   NOTE: *If you have logged into Colleague before, but cannot remember your password, you will need to contact HelpDesk (ext. 5100) and they will change it for you.*

Logging Out of Colleague

1. After finishing your session of Colleague, click the Logout button in the upper right corner of the screen.

NOTE: *DO NOT use the* ***Close Button*** *because it does not end your Colleague session. It may stay active for hours or even days before the programmers see it and kill the process.*

Student Applications Area

1. On the toolbar, click **NAVIGATION**.
2. In the **Application** field at the top of the window, use the drop-down arrow to choose **ST** which is the "Student" area.
3. On the toolbar, click **NAVIGATION** again.

CUSTOMIZING THE COLLEAGUE SCREEN

Maximize the Window

1. Log in to Colleague.
2. In the upper-right corner of the Colleague window, click the **Maximize** button.
3. The actual data window can then be enlarged (by use of the Form Scale Factor) into this maximized area.

Form Scale Factor

This feature allows you to increase the "Zoom Percentage" of the module. This increases the font size for the current module.

***CAUTION**: This technique can only be applied from within a module form. Until a module is opened, the "Form Scale Factor" slider bar will not work.*

1. Log in to Colleague.
2. Using the directions listed above, maximize the window.
3. Open a module form (some are described later in this manual).
4. As circled in the next illustration, click and drag the icon on the slider bar to increase or decrease the size of the fonts being used in Colleague.

5. To keep the same "Form Scale Factor" percentage for ALL Colleague modules:

    a. As circled in the next illustration, click **Options**

    b. Click "**Set Form Scale Default**"

Color Themes

You can now change the color scheme for Colleague.

1. Log in to Colleague.
2. As shown in the next illustration, click **Options**.

3. Click **Preferences**.

Form Background Color:

4. Click the option button for Light, Medium or Dark.

Color Theme:

5. Click the drop-down arrow for the **Color Theme** field.
6. Click a theme.
7. Repeat steps #5-#6 until a desired theme is chosen.
8. 

Auto-Close Context

Another way that you can customize Colleague is to specify if you want a person's record to be removed from the "Person" field (located at the top of the screen) when a module is closed.

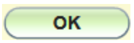
1. Log in to Colleague.
2. Use the drop-down arrow (illustrated below) to specify:

   a. "**Keep Context Open**" – Leaves the student's record open in the top portion of the Colleague window, even after the current module is closed.

   b. "**Auto-Close Context**" – Closes the student's record when the current module is closed.

Editing the Search History

Every new module that is opened is stored in the "Search History." This makes it easier to remember previously-used modules. However, if you don't want a module listed, you can now edit it out.

1. Log in to Colleague.
2. Use the drop-down arrow next to either the "Form Search" field or the "Person Search" field (upper left corner of the Colleague screen) to display the list.
3. At the bottom of the list, click **Edit Search History**.
4. Click the button to specify which list is to be used:
    a. **Form** – to list modules
    b. **Person** – to list people's names that have been searched for previously
5. Click the  icon located to the left of the module name to be removed.
6. 

Views

When you list a group of people, you can specify one of two views to display the information: Card View or Grid View.

1. Log in to Colleague and run a module such as LOCR.
2. Specify the person and press $\boxed{\text{ENTER}}$.
3. Repeat step #2 for each person to be added to the group.
4. As shown in the illustration below, use the icon for the desired view.

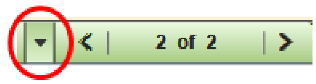
    a. **Card View** – shows the person's photograph and information
    b. **Grid View –** removes the photograph, but shows more people's information on the screen at one time.

    ***NOTE**: The Grid View also allows you to sort the records by clicking on a column heading.*

Viewing All

When you have added multiple people to the top field of Colleague, you only see one person at a time. However, it is possible to see then entire list.

1. Use Colleague to add a several people.
2. As circled in the illustration below, use the drop-down arrow to view all.



3. From the resulting screen, you can:
    a. View one of the records by double-clicking the person.
    b. Close the list by clicking the  icon, located at the bottom of the list.

SEARCHING

For a Person

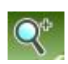
1. Log into Colleague. ***HINT**: If you try to log in, and it takes a really long time, but doesn't actually log in, you probably used your network login by mistake. Close the "stuck" window and log in again. Make sure you put in your Colleague ID (step #2 on pg. 3) and NOT your network ID.*

2. As illustrated below, if the text in the Search Box reads, "Person Search" type the name of the person for whom you want to display information and press ENTER.

***NOTE**: If the text in the Search Box reads, "Form Search," click the circle icon located at the left side of the Search Box to change it. The circle icon allows you to specify a "Person Search" or a "Form Search" depending on what type of search is to be conducted.*

Advanced Search for a Person

The advanced search allows you to be more specific in the search.

1. Log in to Colleague.
2. Click the **Advanced Search**  icon, located at the top of the screen.
3. Fill out the form as needed and press ENTER.
4. When finished, click the  tab to clear the results.

For a Form (or Module)

1. Log in to Colleague.
2. As illustrated below, if the text in the Search Box reads, "Form Search" type the name of the form, a part of the form name, or the four-character abbreviation (mnemonic) into the Search Box and press ENTER.

***NOTE**: If the text in the Search Box reads, "Person Search," click the circle icon located at the left side of the Search Box to change it.*

3. If you get a list of similar modules, you may have to double-click the one you want to use.

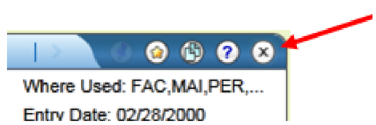
STUDENT INFORMATION FORMS (MODULES)

Student Locator (LOCR)

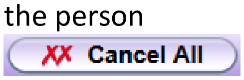
The name of this module is rather misleading. It does not apply to only students. It shows information for students, faculty, employees, and even vendors. This module is good to show your own personal data to see if it is correct in Colleague. It also is used to show if a person is taking or teaching a class on any given day.

1. Use the circle icon (see illustration above) to set the Search Box to look for "FORM SEARCH." You might have to erase the name of the module last used.
2. Type **LOCR** (<u>not</u> case sensitive) and press ENTER.
3. Specify the person by one of these formats, and then press ENTER:
   a. John Public
   b. Pubic, John
   c. SSN <u>without hyphens</u>
   d. Colleague (or Employee) ID Number (with **or** without preceding zeros…it doesn't matter)

4. If you are presented a list of people from which to choose, double-click the desired person.
5. Type a date in the field (if needed) and press ENTER.
6. When finished viewing information for the desired person:
   a. If you want to run the same module using a different person's information:
      i. Click the **Close Current** button (see the illustration below) to clear out the current student's information.



      ii. Type the second person's name and press ENTER.
      iii. Repeat steps #4-#5 for the second person.

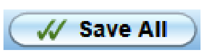
7. Finish the module:
   a. Click the **Close Current** button (see the illustration above) to close out the information for the person
   b. 

8. Launch another Colleague module form if needed.

FACULTY INFORMATION FORMS (MODULES)

Faculty Office Hours (FAOH)

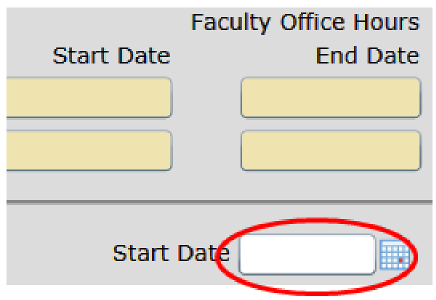
This module allows the faculty member to office hours in Colleague.

1. Use the circle icon (see illustration above) located at the left side of the Search Box to perform a “FORM SEARCH.” You might have to erase the name of the module last used.
2. In the Form Search Box, type **FAOH** and press ENTER.
3. Enter the faculty member’s name or employee number and press ENTER.
4. Fill out the form as needed. If you don’t know the building code, type three periods into the field and press ENTER to run a lookup.
5. 

Faculty Schedule Inquiry (FCSI)

This module shows a faculty member's schedule for the specified semester.

1. Use the circle icon (see illustration above) located at the left side of the Search Box to look for "FORM SEARCH." You might have to erase the name of the module last used.
2. In the Form Search Box, type **FCSI** and press ENTER.
3. Type the name of the faculty member. If you get a list of people from which to choose, just double-click the faculty member's name to be used in this search.

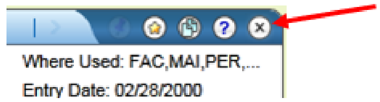


4. In the **Start Date** field, type the semester code (examples are displayed below) and press ENTER.

Semester Codes	
Code	**Example**
FA for Fall & Fall2	2011FA
SP for Spring I & II	2012SP
SU for Summer terms	2012SU

***NOTE**: Colleague will fill in the starting and ending dates according to the semester code that was used. Every course starting and ending between the starting and ending dates of the specified semester will be displayed.*

9. Click the **Close Current** button (see the illustration below) located at the far right side of the faculty member's information bar to clear out the current faculty member's information.



10. Press 

when finished.

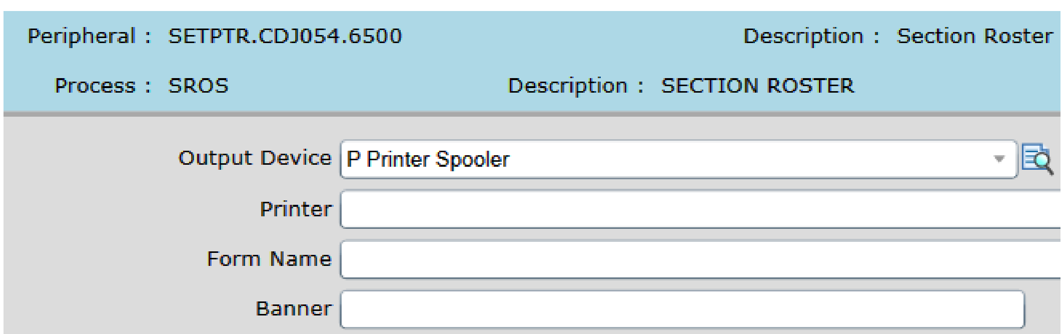
Faculty Workload Report (FWLR)

This module prints a report of faculty load and contact hours. This module does not allow editing of the report, just printing it.

1. Use the circle icon (see illustration above) to set the Search Box to look for "FORM SEARCH." You might have to erase the name of the module last used.
2. In the Form Search Box, type **FWLR** and press ENTER.
3. At the top of the form:
    a. Click the circle icon (see arrow above). This changes the Search Box to "Person Search."
    b. In the Search Box, type the faculty member's name and press ENTER.
    c. Double-click the faculty member's name.

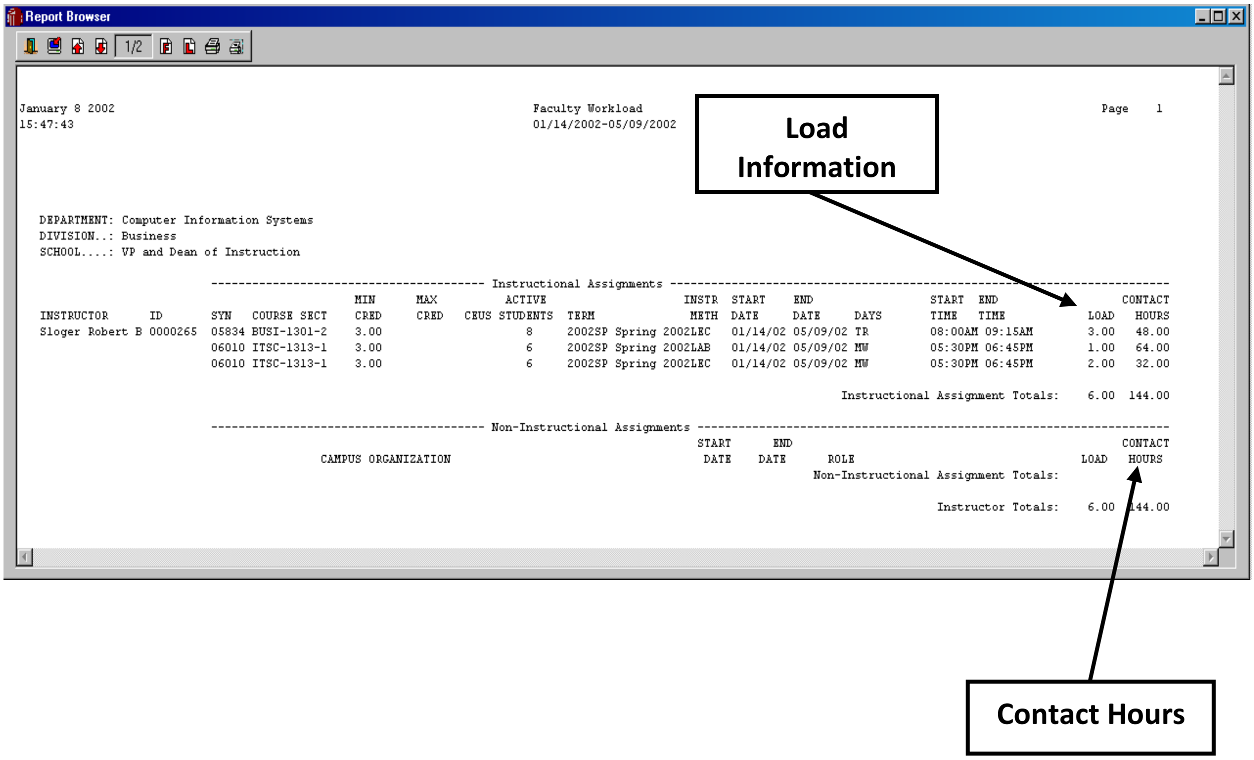
   ***HINT**: Delete the date that is displayed in the End Date field. This causes an error when the semester code is added to the Start Date field.*

4. Clear the contents of the Starting and Ending dates.
5. In the Start/End Date text box, type the semester code. (refer to page 11 if needed)
6. Press the Function F9 key.



7. At this stage, the printing directions are identical to the SROS module. Please refer to pages 17 through 19 for directions on how to print the report.

   ***NOTE**: On the next page of this manual is a sample of what a FWLR report will look like.*



January 8 2002
15:47:43

Faculty Workload
01/14/2002-05/09/2002

Page 1

DEPARTMENT: Computer Information Systems
DIVISION..: Business
SCHOOL....: VP and Dean of Instruction

------ Instructional Assignments ------

INSTRUCTOR	ID	SYN	COURSE SECT	MIN CRED	MAX CRED	CEUS	ACTIVE STUDENTS	TERM	INSTR METH	START DATE	END DATE	DAYS	START TIME	END TIME	LOAD	CONTACT HOURS
Sloger Robert B	0000265	05834	BUSI-1301-2	3.00			8	2002SP Spring 2002	LEC	01/14/02	05/09/02	TR	08:00AM	09:15AM	3.00	48.00
		06010	ITSC-1313-1	3.00			6	2002SP Spring 2002	LAB	01/14/02	05/09/02	MW	05:30PM	06:45PM	1.00	64.00
		06010	ITSC-1313-1	3.00			6	2002SP Spring 2002	LEC	01/14/02	05/09/02	MW	05:30PM	06:45PM	2.00	32.00

Instructional Assignment Totals: 6.00 144.00

------ Non-Instructional Assignments ------

CAMPUS ORGANIZATION	START DATE	END DATE	ROLE	LOAD	CONTACT HOURS

Non-Instructional Assignment Totals:

Instructor Totals: 6.00 144.00

CLASS INFORMATION FORMS (MODULES)

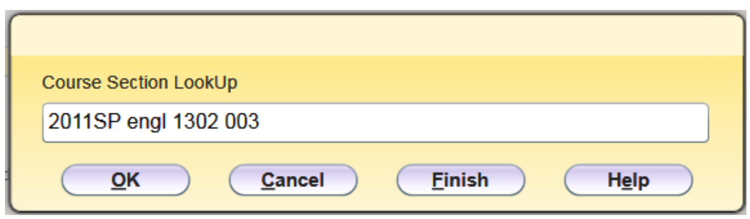
Section Roster Inquiry (SRSI)

This module displays a class roster (including Special Needs Codes), but does not allow printing of the rosters.

Class Rosters

1. Use the circle icon (see illustration above) located at the left side of the Search Box to look for "FORM SEARCH." You might have to erase the name of the module last used.
2. In the Form Search Box, type **SRSI** and press ENTER.
3. Specify the class for which you want to see a roster.

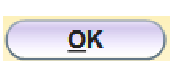
   Method #1: Long method



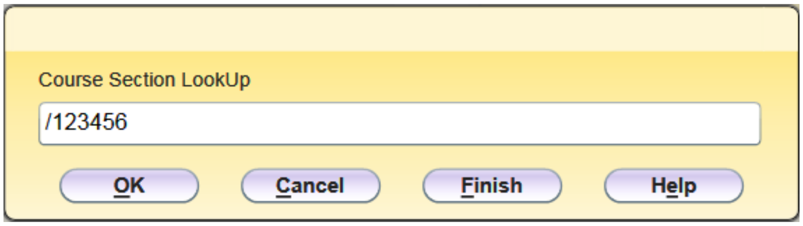
4. You have to start with the semester code. If you don't, Colleague does not automatically look for the class in the current semester. It may find a class with the same number from a previous year!

   As shown in the illustration above, type the following information, separated by spaces (see example above):
   a. Semester code. See page 11 for semester codes. (Ex. above is 2011SP)
   b. Class name, or rubric. (Ex. above: ENGL is an English class)
   c. Class number (Ex. above: class number is 1302)
   d. Section number (Ex above: class section number is 003)

   NOTE*: If you do not type all of the information for the class, a resolution box will be displayed listing all possible classes. For example, in the illustration above, if the section "003" was left off, then all English 1302 classes for the Spring 2011 semester would be listed. If the class number and section number were left off, then all the English classes for Spring 2011 would be listed.*

5. 

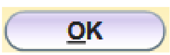
Method #2: Shortcut Method (you have to know the Class ID#)

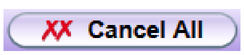


11. Type a forward slash "/" followed by the 6-digit Course ID Number
(Example above: /123456)

NOTE: The forward slash "/" symbol represents the current semester.

12. Press ENTER.

13. 

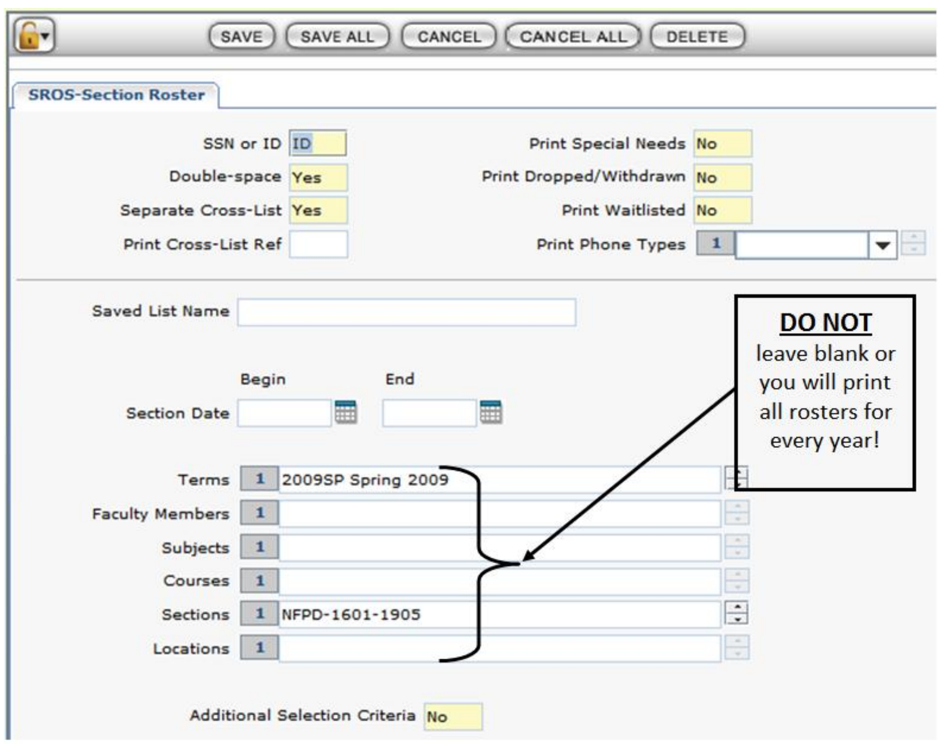
14. Press 

when finished with this module form.

Section Roster (SROS)

Use this module to print a class roster for a particular class, all the class rosters for a single instructor, or all the class rosters for a whole group of people.

1. Use the circle icon (see illustration above) to set the Search Box to look for "FORM SEARCH." You might have to erase the name of the module last used.
2. In the Form Search Box, type **SROS** and press ENTER.
3. Use the fields at the bottom of the screen to select which class(es) are to have rosters printed.



SSN or ID – Please use ID only

Double-space – This double spaces the student names

Print Cross-List Ref – Separates Academic students from Continuing Education students

Print Special Needs – Prints information about students who have information about special needs for the class

Print Dropped/Withdrawn students – Include the students who have dropped or withdrawn

Print Waitlist – Skip this

Print Phone Types – Allows you to specify which phone numbers to print

Ignore these fields:

a. "Saved List Name"
b. "Section Date"

Terms – Type the semester code in which the class is to be taught (see page 11 for semester codes)

Faculty Members – specify the instructor(s) for whom rosters are being printed

Subjects and Courses – Allow you to specify a particular type of class. For example, print all the English class rosters for a specified faculty member

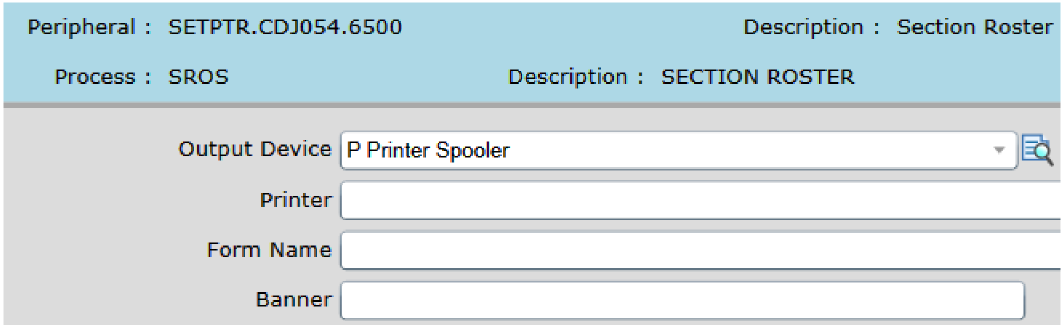
Sections – Used to print a roster for a particular class, regardless of who teaches it. Therefore, clear out the "Faculty Members" field before using this field. Specify classes with one of these two methods:

a. Type a forward slash "/" followed by the 6-digit Course ID Number (123456)
   (Example: /123456)

b. Semester Code, Subject, Course Number, Section Number
   (2011FA ENGL 1302 005)

   ***NOTE**: After the first class has been specified, the **Sections** field will appear to be empty. If desired, use the "Page Up" key to see the previous person's name.*

4. Press the Function F9 key twice. The screen should look similar to the next illustration.



5. In the **Output Device** field, use the drop-down arrow to select "H Hold/Browse File Output."
6. Press the Function F9 key.
7. If needed, add a checkmark to the **Close Automatically when Complete** box. **H***INT*: *You may have to click the blinking icon at the bottom of the screen to display the report on the screen.*
8. Continue to the next section of this manual to print the report, if desired.

Printing Class Rosters

After the report has been created (described in the previous section of this manual), it can be printed. A report can be printed locally or on a networked printer.

Print Locally

This option brings the report up in your default web browser as a PDF file which can then be printed.

1. 

2. Select font and font size if desired.

3. 

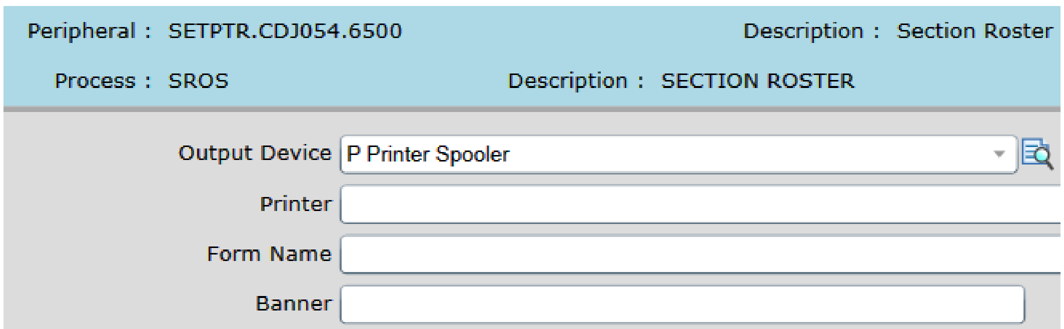
4. 

Print Remotely

Some people do not have access to a printer so they have to use a printer in their department's office. Not all departments have a networked printer.

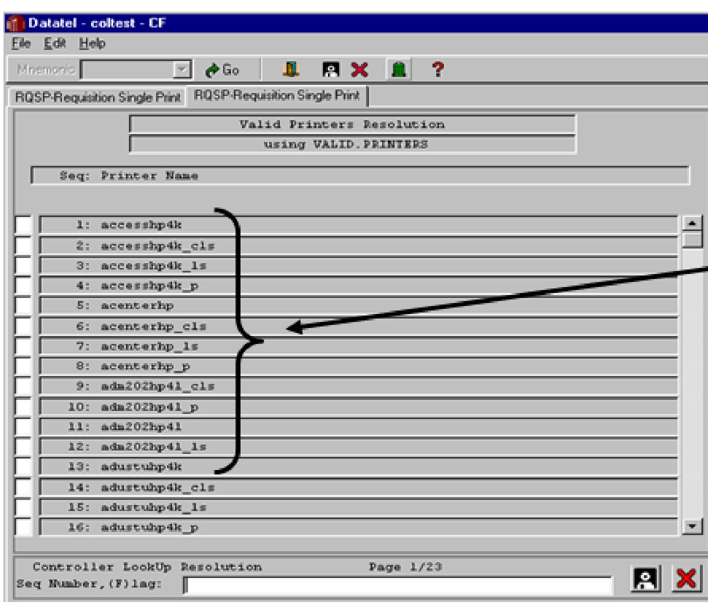
> ***NOTE**: Use the directions listed earlier to create the SROS report. After step #7, continue with these directions.*

1. 



> ***NOTE**: Before sending your first report to a networked printer, contact your department secretary or division secretary to see exactly which printer definition to use.*

2. In the **Printer** field, type three periods and press ENTER.
3. From the list, double-click the printer for your department (see note above).



Printer Definition Codes found at the end of some printer names:

CP = Condensed Print

LS = Landscape

P = Portrait

CLS = Condensed-Landscape

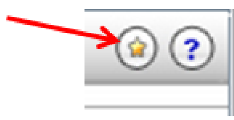
5. Press the Function F9 key to continue.

FAVORITES

As you start working with Colleague, there will be certain modules and even certain people who you work with frequently. These modules, or even people, can be added to your "Favorites" so they can be used later.

Adding Favorites

1. Run any desired module in Colleague.
2. As shown in the illustration below, click the little yellow STAR icon, located at the upper right side of the gray module bar.



Accessing a Favorite

1. At the top of the screen, click the **Favorites** icon.
2. In the right-hand window, double-click the desired module favorite.

Deleting a Favorite

1. At the top of the screen, click the **Favorites** icon.
2. In the right-hand window, click the module to be removed.
3. Click the  icon, located above the first module in the favorites list.
4. Click the option to "**Remove Selected**."
5. At the top of the screen, click the **Favorites** icon.

SHARING LISTS OF STUDENTS

Some departments work with a certain group of students and it is beneficial to share their lists of students with everyone in the department.

Add the Student Records to a Folder

1. Log in to Colleague.
2. In the upper left corner of the screen, use the icon if needed, to switch to "Person Search."
3. Type a student's name (and press ENTER), and then double-click their name record from the list.
4. Repeat step #3 for each student who is to be added to your list of students.
5. At the right side of the displayed student's name record, click the **Favorites** **icon.**
6. Choose the option marked "Add All to Favorites"
7. Add the student name records to a folders:
    a. Click the New Folder button.
    b. Type a name for the new folder and press ENTER.
    c. Add
8. At the right side of the displayed student's record, click the **Favorites** icon**.**

   The new folder will be open displaying the student records inside the folder.

9. Close the folder by clicking the icon in front of the folder name. (HINT: This icon will open or close the folder.)

Creating a "Shared List" of Student Records

1. Follow the steps listed in the previous section of this manual to create a folder of student records.
2. At the top of the Colleague window, click FAVORITES.
3. Click the desired folder containing the student name records to select it.
4. Click the icon, located above the folder.
5. Choose "**Create Shared List.**"
6. Type a short, meaningful name that others will understand what is being shared. (do not erase the leading characters, and do not add any spaces to the name)
7. Create
8. OK

Viewing a "Shared List" of Student Name Records

1. Login to Colleague.

1. On the main screen of Colleague, click the **Advanced Search**  icon**.**
2. In the **Shared List Name** field, type the name of the "shared list" and press ENTER. See hint below…

   ***HINT**: You have to be precise. The name is automatically converted to UPPER CASE and spaces are automatically converted to underscores*

3. Add a checkmark to the **Select All** box, located on the toolbar above the first person's record.
4. Click the  button, located at the bottom of the screen.
5. Follow the directions listed previously in this manual to add the students name records to a new folder.

APPENDIX A

Department Acronyms:

ACAC – Assistance Center
ACACNorth – Assistance Center
Access – Access
Acenter – Assistance Center
Adm202 – East Campus Admin. ECM-B
Adustu – Adult Student/Women Services
ADV – Advising & Counseling Duty Desk
Advcoun – Advising & Counseling
Advoc – Adult Vocational
AHH – Allied Health
Allh – Allied Health
Alprog – Alcohol Prevention
AP – Business Office A/P checks only
Atcbus – ATC Business Office
Atclab – ATC computer lab
Atclib – ATC library
Atcreg – ATC Registrar's office
BB212 – Business Building room 212
Behst – Behavioral Studies
Biclab – B&I lab #126
Biol – Biology
Boxoff – Box Office
Busdiv – Business Division
Bus – Business Office
Busmgt – Business Management
Busoff – Business Office
Career – Career Planning & Placement
Carter – Carter Gym
Cedu – Continuing Education (Polk St.)
Chem – Chemistry
CIS – Computer Information Systems
CJ – Criminal Justice
Colrel – College Relations
CTL – Center for Teaching & Learning
Dur205 – Durrett Hall room 205
Dur209 – Durrett Hall room 209
Electr – Electronics
Eng214 – Engineering lab #214
Engl – English
Enrlcan – Enrollment Management (cannon)
Enroll – Enrollment Management
Etech – Electronics Technology
FAO – Financial Aid Office
Firetech – Fire Protection Technology
Fmc – Physical Plant
Found – Foundation
HC – Hereford Campus
Hcare – Health Care
Hepdj – HEP on the ATC campus
Housing – Housing Department
Instad – Instructional Advancement
ITS – Information Technology Systems
KACV117 – KACV
Langcomm – Language / Communications
Lechal – Lecture Hall
Lib110 – Library room #110
LIB111 – LIBRARY ROOM #111
Lib18 – Library room #112
Lib4th – Library 4th floor
Libsacs – Library SACS
Mantech – Manufacturing Technology
Math – Mathematics
Mcfac – Moore County Faculty
Mchall – Moore County Hall
Mcserv –Moore County Student Services
Mcsss – Moore County Student Services
Modlang – Modern Languages
Mus203 – Music room #203
Mus301 – Music room #301
Nrsal06 – Nursing building A 106
NS8100 – Network Services

(Continued on Next Page)

Pers – Personnel
PH315 – Parcell's Hall room 315
Photo – Photography
Physpl – Physical Plant
Police – Police
Pres – President's office
Prdev – Professional & Org. Development
Purch – Purchasing
Reg8150 – Registrar
Reg – Registration
Russell – Russell Hall
Science – Sciences & Engineering
Socsci – Social Sciences
Speech – Speech and Theater Arts
Studact – Student Activities
Stuserv – Student Services
Testing – Testing Center
Trans – Transportation Division
Vp – Vice President's office
Washbkstr – Washington St. Bookstore
Wcd106 – West Campus Building D 106
Wcnrc – West Campus Nursing
Wrkf109 – Workforce Development #10
Wtest – West Campus Testing

If your department is not listed, please contact Tim Hicks to see if your department has a networked printer and its name.