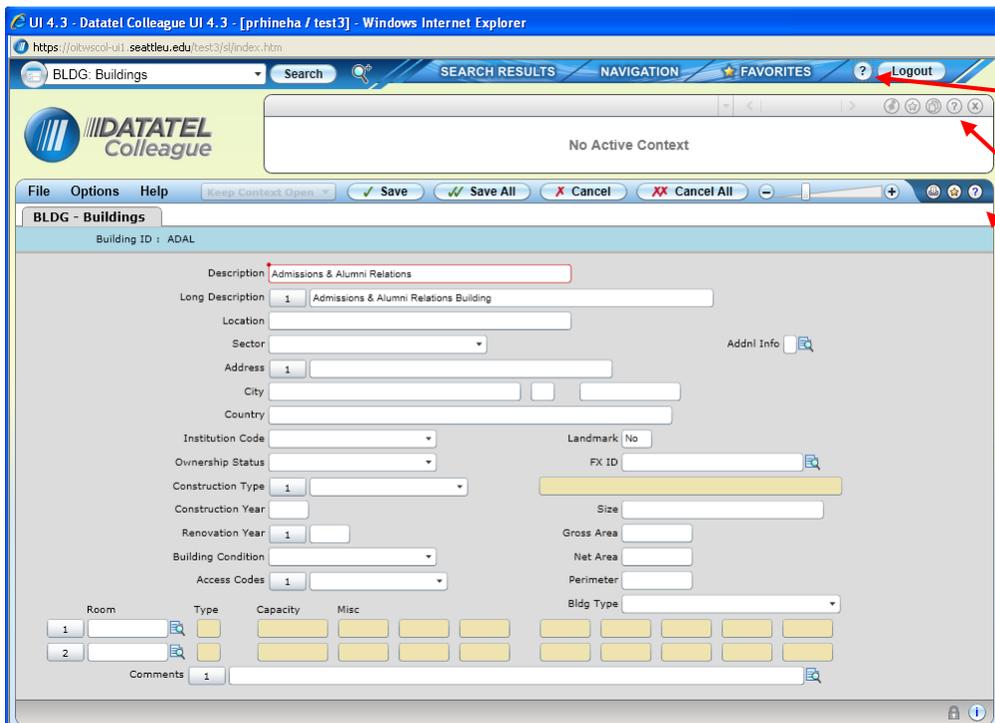


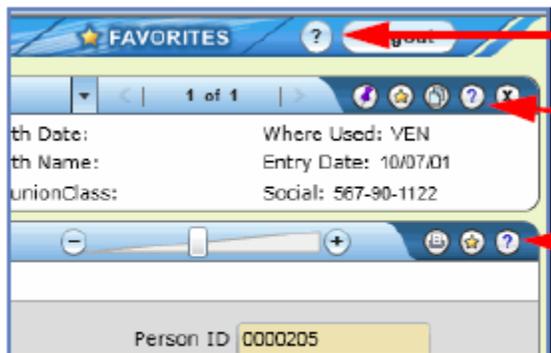
Viewing Online Help in User Interface 4.3

UI 4.3 Datatel Help provides you with detailed information about areas of the UI 4.3 interface. A question mark icon is available on most UI 4.3 areas, such as the Context Area, Search Results, Navigation, and Favorites panels, and dialog boxes. For any particular UI 4.3 screen, you can click on the question mark icon to view process, field, and how-to help specific to that screen.

Simply click on the question mark icon, to open the relevant area of Help documentation. The Help documentation will launch in a new browser window, so you will need to turn off Pop-up blockers if the Help information is not successfully launching a new browser window.



The screenshot shows the 'BLDG - Buildings' form in the Datatel Colleague UI 4.3. The form contains various fields for building information, including Description, Long Description, Location, Sector, Address, City, Country, Institution Code, Ownership Status, Construction Type, Construction Year, Renovation Year, Building Condition, Access Codes, Landmark, FX ID, Size, Gross Area, Net Area, Perimeter, and Bldg Type. A table at the bottom lists rooms with columns for Room, Type, Capacity, and Misc. Three callout boxes with red arrows point to help icons: 'UI Window Help' points to the question mark icon in the top right navigation bar; 'Context Area Help' points to the question mark icon in the top right of the form's context area; 'UI Form Help' points to the question mark icon in the top right of the form's main content area.



The screenshot shows a close-up of the 'Person' form in the Datatel Colleague UI 4.3. The form displays fields for Birth Date, Birth Name, UnionClass, Where Used, Entry Date, and Social. A callout box with a red arrow points to the question mark icon in the top right navigation bar, labeled 'UI Window Help'. Another callout box with a red arrow points to the question mark icon in the top right of the form's context area, labeled 'Context Area Help'. A third callout box with a red arrow points to the question mark icon in the top right of the form's main content area, labeled 'UI Form Help'.

The title of the help page indicates the UI Area for this help topic.

The help **Search** text box lets you search for information in manuals (PDF files) and Tech Doc Online.

The screenshot shows a browser window titled "Colleague Help". The main heading is "Help for the Context Area". Below this is an "Overview" section. The text describes the Context Area's function, how to use the person search feature, and details about Person Cards and Organization Cards. It also covers privacy messages, mapping features, and buttons for Favorites, Copy Window, Help, and Close. At the bottom, there are keyboard shortcuts for mapping records.

Colleague Help Search

Help for the Context Area

Overview

The Context Area displays information about the person or organization records that you are currently working with.

If the Context Area is blank, use the person search feature to select Person or Organization records to work with. When you open the selected records, they are loaded into the Context Area as "cards." If you have opened a person-related form first, you can use LookUp to select records and load them into the Context Area.

Person Cards can include photographs (if set up by your institution) and other identifying information about the person (such as name, address, and ID). Your institution can customize the information shown on the Person Cards. Organization Cards include similar identifying information but do not include photographs.

The Context Area can hold one or more cards of the same type (person cards or organization cards but not both at the same time). When multiple cards are loaded into the Context Area, you can use the Next and Previous buttons to scroll through the cards. You can also use the card selector drop-down list in the middle of the card title bar to go directly to a specific card.

If privacy codes are enabled at your institution, privacy messages for a person displayed over the Context Area for a few seconds then fade away. An exclamation mark indicator (!) in the far left of the card title area indicates a privacy message is available for a person. Click this indicator to view the privacy message again. If the privacy settings do not allow you to access a person's record, you will only be able to see the name and ID of the person, with a message stating that the record is not accessible because of privacy settings.

If allowed by your institution, you can click the Mapping button (push pin) to view a map showing the address(es) of the current card or all cards in the Context Area.

Click the Add to Favorites button (gold star) to add the current card or all cards to your Person Favorites.

Click the Launch Copy Window button (green page) to launch a new browser window with the contents of the current context card in a format that lets you select and copy the text and then paste it into another application.

Click the Context Area Help button (question mark) to access this help message.

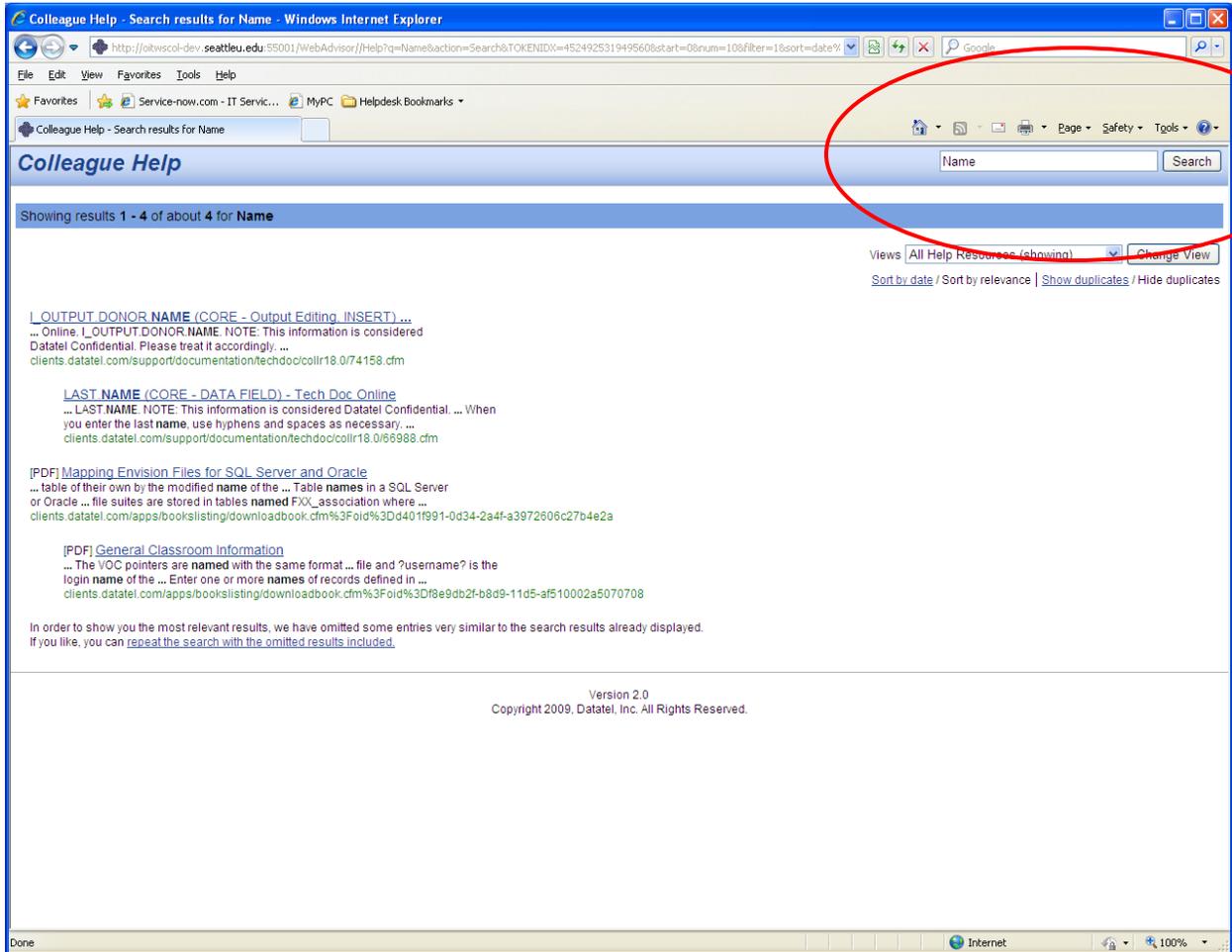
Click the Close button (x) to close the current card or all cards in the Context Area.

Keyboard Shortcuts for Context Area features:

- Map current record in Context Area: **Ctrl+Shift+M**
- Map all records in Context Area: **Ctrl+Alt+M**

For all UI Area help topics, a single page of information specific to the UI Area is shown.

NOTE: if you perform a **Search** within the Help documentation, the results may point you to the clients.datatel.com website. In order to access clients.datatel.com, you will need to request a login, as discussed on the next page below.



As shown below, you can request a login to <http://clients.datatel.com>, in order to access additional Datatel documentation. Once you submit your login request, Seattle University OIT will receive an email and will then confirm your account. Seattle University's Datatel client ID is "S27" if that information is requested in your registration process.

[HTTP://CLIENTS.DATATEL.COM](http://clients.datatel.com)

///DATATEL.
This Web Site is for use by Datatel clients.

Client Login

Already Have a Login?

Clients with a login should enter their username and password:

Username

Password

Note: Passwords are case-sensitive.

Forget your password?
Let us send you an email reminder.

Forget your username?
If you have forgotten your username, we'll send you an email reminder.

Need a Login?

[Request a login now](#)

We encourage all employees at institutions supported by Datatel's Extended Software & Services Agreement (ESSA) to request a login. After logging in, Datatel clients will have access to important resources, including: documentation, software announcements, client communities, and much more.

Please Note: If your institution has identified you as a System Administrator, you will have additional access to software downloads.

If you have questions about access to the Datatel Website, please contact webmaster@datatel.com

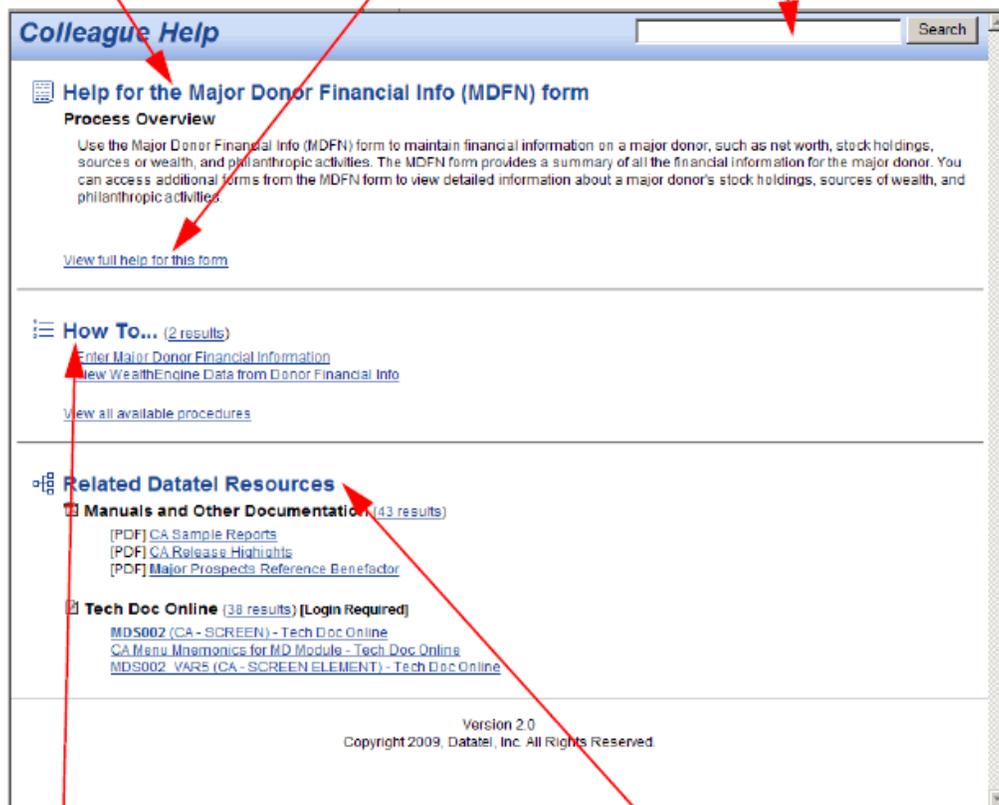
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Within any Datatel form or screen, when you click on the question mark you can obtain specific Help documentation as shown below. As discussed above, some of this documentation will require you to request a login to clients.datatel.com. Tech Doc refers to technical documentation that may not be useful to many users.

The title of the help page indicates the UI Form for this help topic.

Process and field help for the current form is available in this section of the help page. Select **View all help for this form** to see all process and field help for the current form.

The help **Search** text box lets you search for information in manuals (PDF files) and Tech Doc Online.



Online procedural help topics relevant to this UI form are listed in this section of the help page.

PDF files and Tech Doc Online pages relevant to this UI Form are listed in this section of the help page.

If you click on the link to “[View Full Help for this Form](#)” you will be able to read information about each particular field on the screen. As shown below, for each field you can see the database field name and other information about the field.

Suffix: Enter a suffix code or title for the individual.

If the code you enter here exists in the SUFFIXES table, the system displays the suffix text with the standard capitalization and abbreviation for the suffix as found in the table.

If the suffix that you enter here does not exist in the SUFFIXES table, enter an equal sign (=) followed by the suffix typed exactly as you need the system to store and display it. The equal sign is entered as is.

CDD Name: SUFFIX
Validation: SUFFIXES OPT (table)

[\[Return to top of page\]](#)

Address: Enter a street address for this individual. Enter a street address for this person.

You can detail to the Person Addresses (ADR) form to maintain further information about this individual's address.

Warning: If you enter new address information and then detail to the Person Addresses (ADR) form from the Address field, the new address information that has not been filed will not be filed on the ADR form. Therefore, when you detail, a warning message displays:

WARNING: Address changes will be lost when you detail. Continue? (Y/N)

If you enter "Y" to continue, any address information just entered on the Name and Address Entry (NAE) form will be lost and will need to be reentered on the ADR form or upon return to the NAE form and can then update to save the information. When you reenter the NAE form, the data will have been filed and you can proceed with the detail.

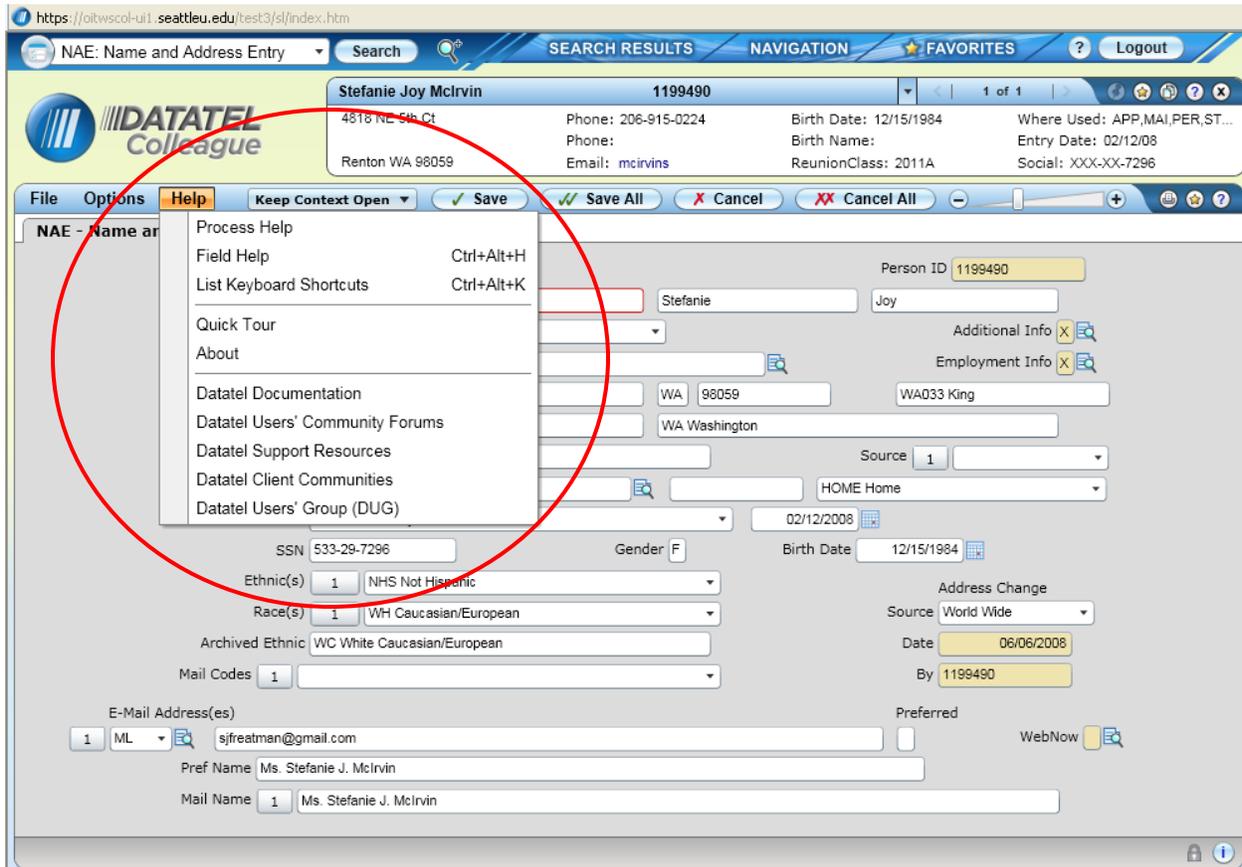
The address information entered in this field is used along with the addressee's name, city, state, zip code, and country, to format labels and envelopes for this person.

City, state, and zip code information should not be included in this field with the exception of foreign addresses that have a nonstandard method of formatting the last line of the label. For the address lines of foreign addresses, do not duplicate them in the city, state, and zip code fields.

CDD Name: VAR.ADDRESS.LINES

[\[Return to top of page\]](#)

The other aspect of UI 4.3 Help that you may find useful is the Help menu. By clicking on the Help menu, as shown below, you can access Process and Field Help relevant to the particular screen you are on. You can also access information on Keyboard Shortcuts, launch the Quick Tour introductory video, as well as a variety of additional Datatel resources. Keep in mind, as discussed above, some of these Datatel resources will ask for a login to the clients.datatel.com website.



The new Datatel 4.3 Help documentation includes a wealth of information that you may find useful. If you have any questions contact OIT Application Services applsvcs@seattleu.edu.