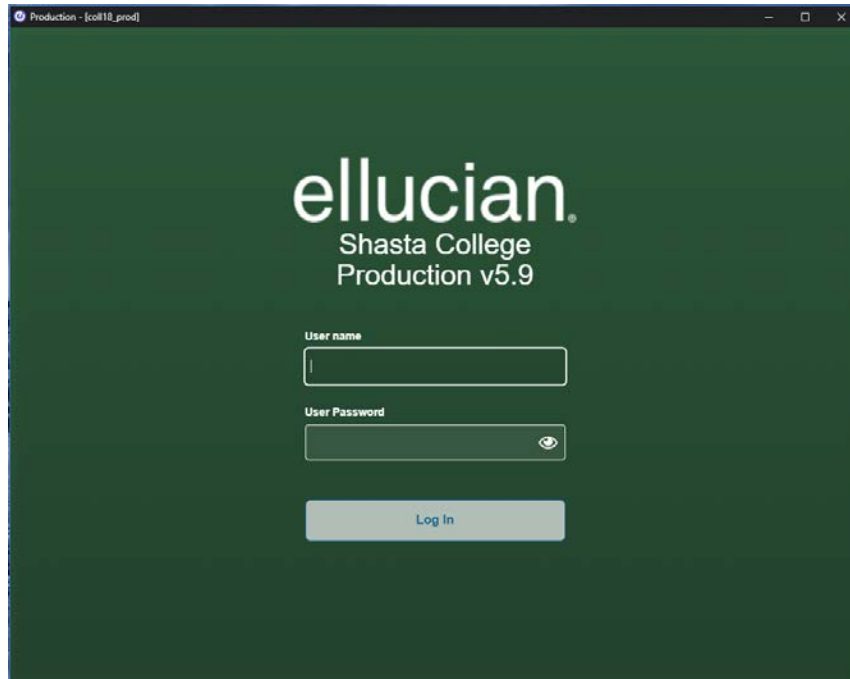


# Colleague UI 5

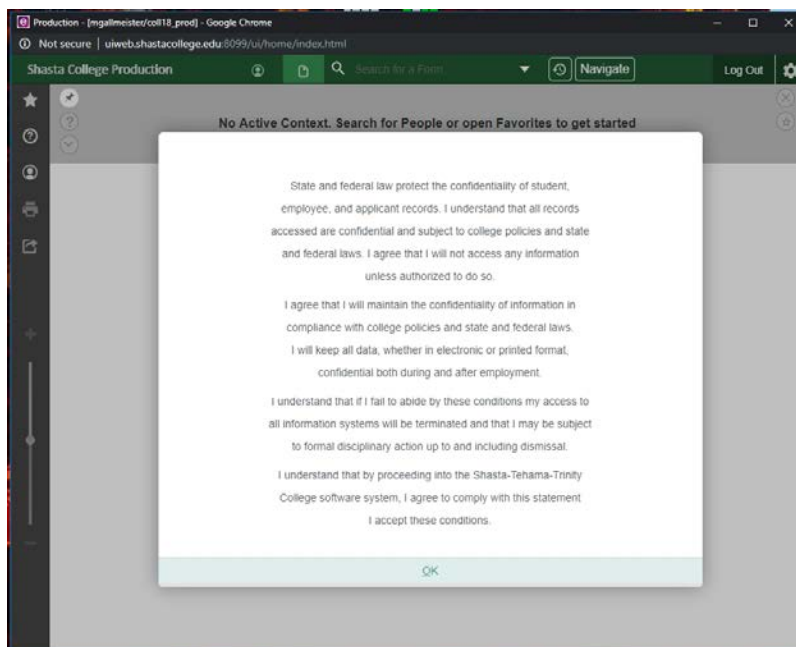
**\*\*All information contained herein is subject to change.\*\***

## Getting started

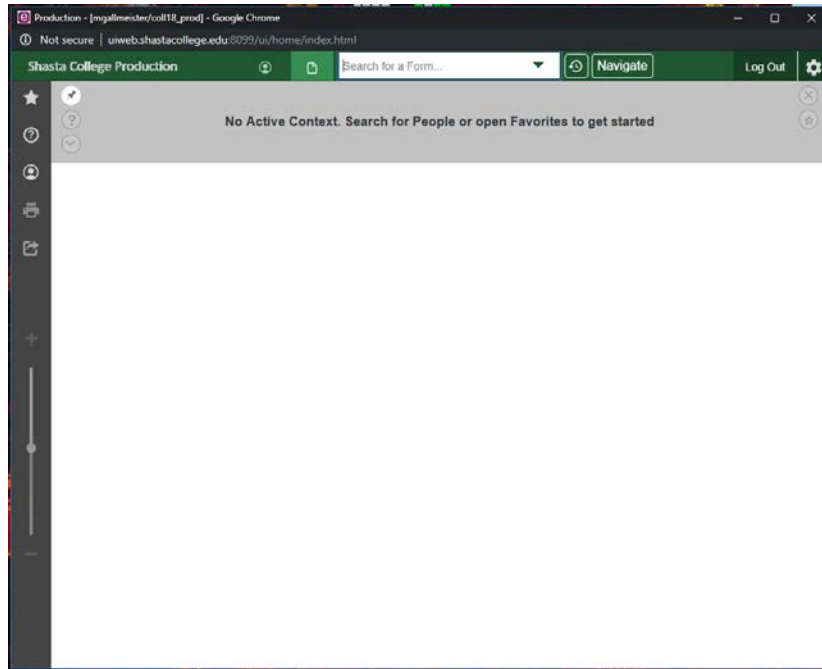
Select the Colleague icon on your desktop and it will open it in a Google Chrome Incognito browser window.




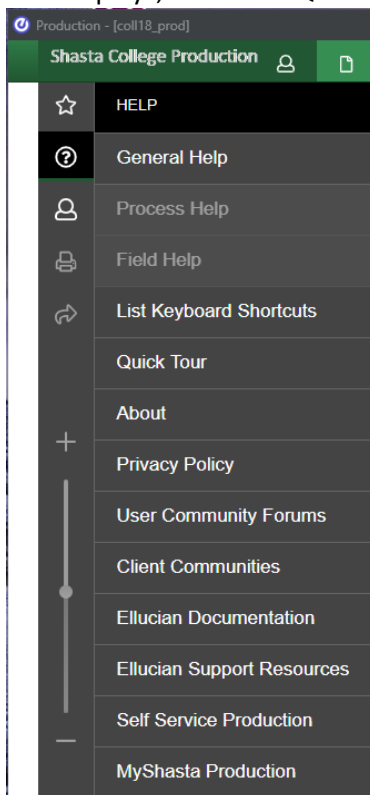
Enter your username and password and hit return, or click the “Log In” button. You will see an application usage agreement message, just like you do with the current version of the Colleague, UI 4.5.



After reading the message, click “OK” and you will be taken to the home screen of UI5.



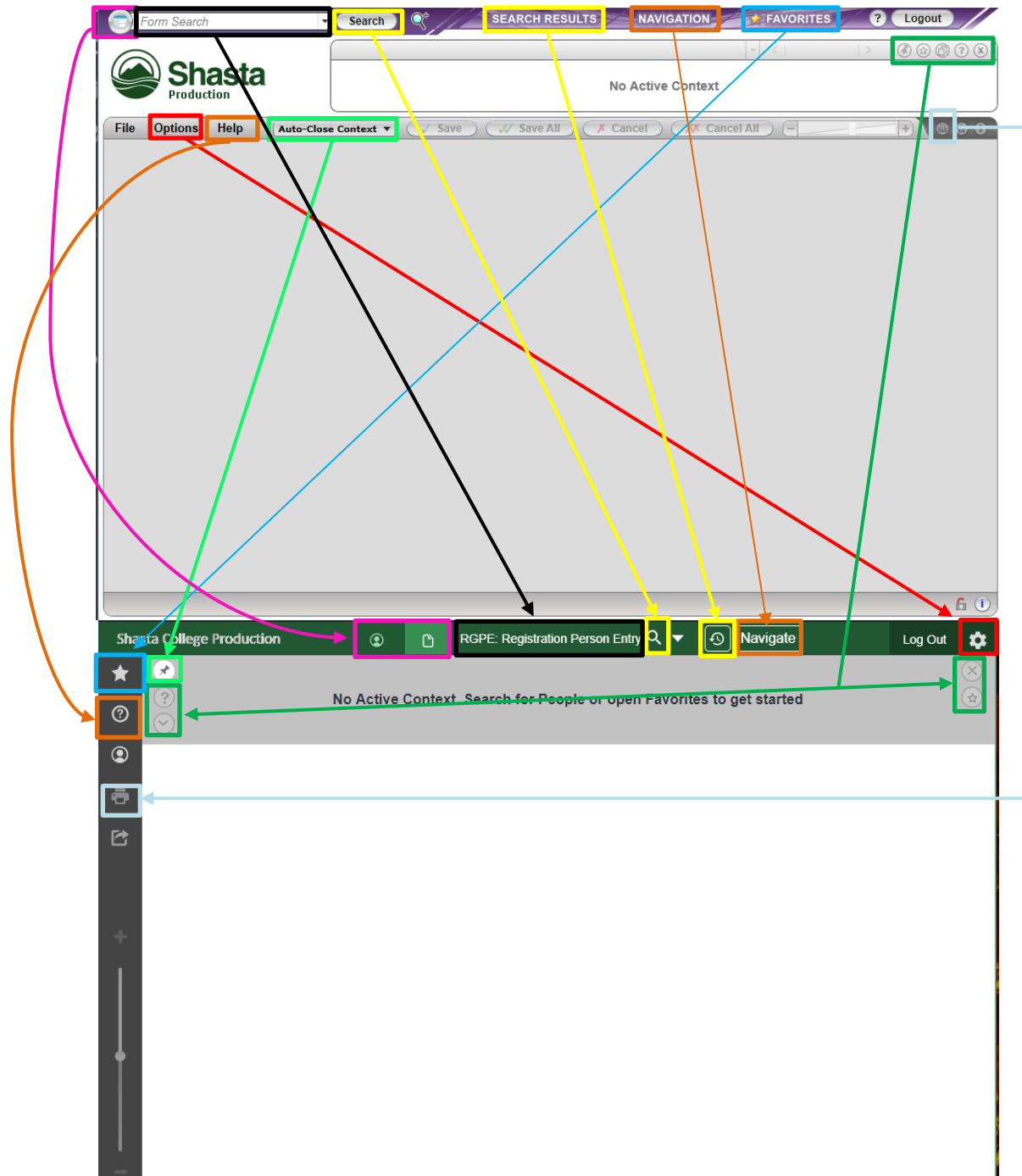
Unlike UI4, the first time you log in you will not be prompted to watch the Quick Tour video. However a recent version of the video is available, and it is highly encouraged that you watch it at least once before starting to use UI5. The video is about 6 minutes long and covers the major changes from UI4 to UI5. To access the Quick Tour, click on the  (HELP) symbol on the left-hand side of the screen. From the menu that displays, select the Quick Tour option.



Along with the Quick Tour, there are other useful links, including convenient links to Self Service and also MyShasta.

## Significant changes

- 1) **Layout:** the general layout has changed. Here's a diagram of where certain fields have moved to.



- 2) **Form Navigation:** the 'detail to next line/entry arrows' have moved. Now, instead of being directly above the field you have selected, it will always be at the top of the page. (You can still select the field with your cursor and use the up/down arrow keys on the keyboard to scroll through the entries instead of clicking on the arrows.)

**UI4:**

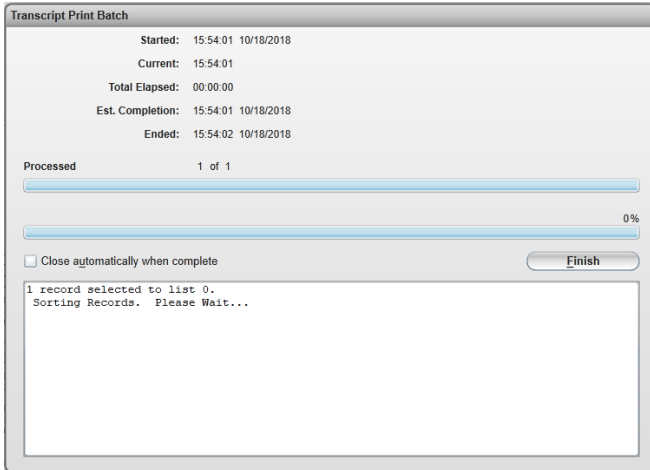
The screenshot shows the 'SECT - Sections' form for section ENGL-1A-F6960. The form contains various input fields for details like Section, Term, Start/End dates, Synonym, Depts/Pct, Credit Type, Min/Max/Incr, CEUs, Course Lvl, Acad Lvl, Grade Scheme, and Short Title. At the bottom, there are Status and Date fields. A red box highlights a navigation bar at the top right of the form area, which includes a search icon, a 'Page 1 of 3' indicator, and navigation arrows.

**UI5:**

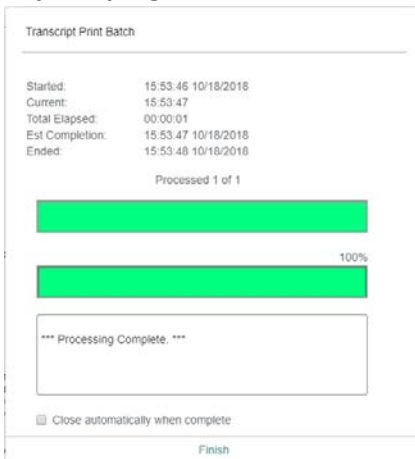
The screenshot shows the 'SECT - Sections' form for section ENGL-1A-F6960, similar to UI4. A red box highlights a navigation bar at the top of the form, which includes a search icon, a '1 of 3' indicator, and navigation arrows. The form fields are the same as in UI4, but the navigation bar is more prominent and includes a 'Save' button in the top right corner.

- 3) **Running Reports and Exporting:** the report processing and export to pdf screens have changed their appearance but retain the same information.

**Report progress in UI4:**



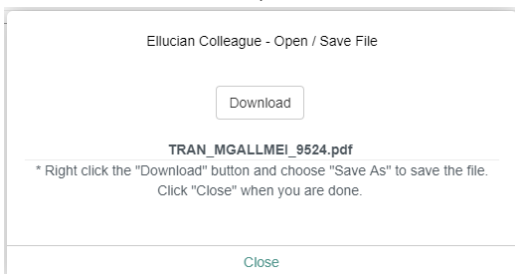
**Reports progress in UI5:**



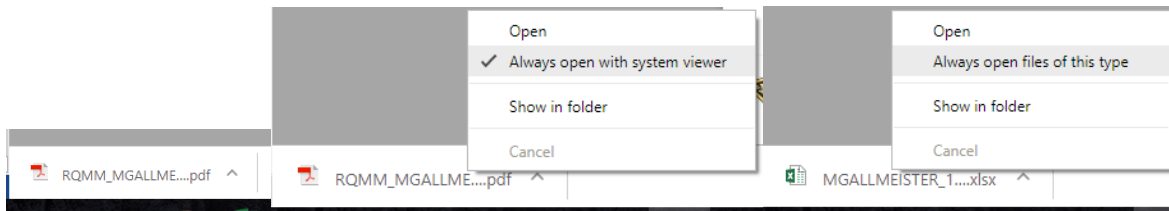
**Exporting in UI4:** opens a new window with a link that opens the PDF and downloads the document automatically to the Downloads folder.



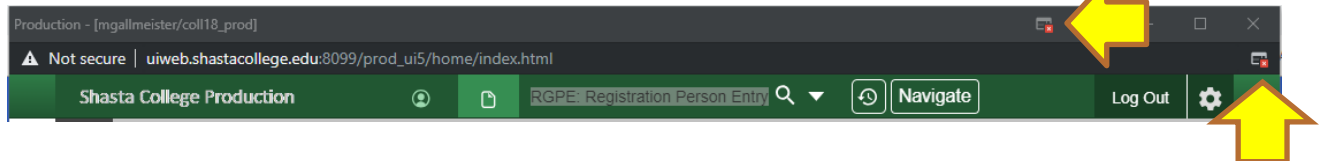
**Exporting in UI5:** a pop-up prompts you to action. "Download" downloads the file to your Downloads folder and opens the file. If you right-click "Download" you can select where to save the file, which will then open.



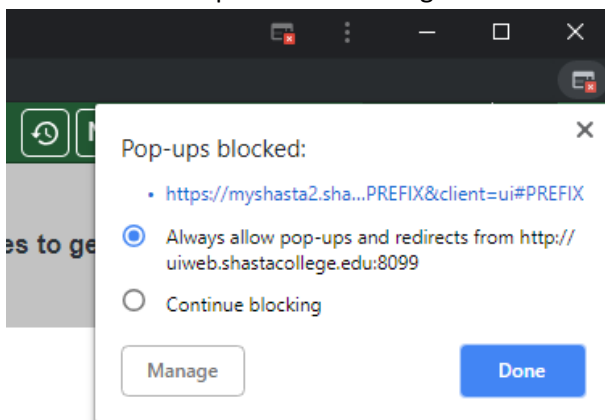
**Tip:** When exporting to a PDF or Excel, your Chrome browser might not auto-open the file. Instead you may receive a bar at the bottom of your browser window showing the downloaded file, which you can click on to open the file. To have these files open automatically, right-click on the file and select the “Always open with system viewer” or “Always open files of this type” option.



- 4) **Pop-up Blockers:** since UI5 runs within a web browser, it is subject to the browser’s pop-up blocking rules. If, at the top of the UI window, you see something similar to the image below, then the browser blocked a pop-up from the UI.



To allow pop-ups from the UI, click on the blocked content icon (identified above). A small window will appear at your cursor. Click on the bubble to “Always allow pop-ups and redirects from...” Then click “Done.” To view what was blocked, click on the icon again and select the blue text. Next time the content will open without being blocked\*.



\*Note: this process will have to be repeated after every time you clear the browser’s temporary internet files.

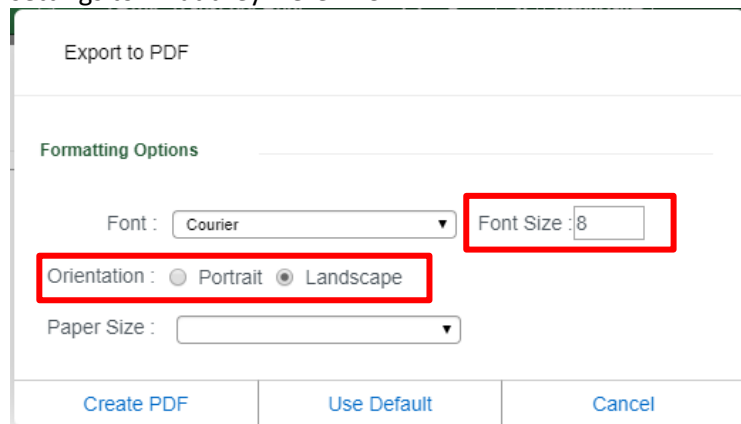
## Changes to your settings

### **Commonly used mnemonics:**

Prior to logging into UI5 for the first time, it is recommended that you make a list of the mnemonics that you commonly use. Your mnemonic search/use history will not follow you to the new UI. However, once you use a mnemonic in UI5, it will remember it at a database level; this means that you can log in from a different computer and it will remember those mnemonics, whereas in UI4 they are stored locally and are not available when moving to a new computer/workstation.

### **Print settings:**

All print/export to pdf settings will be at their default settings. This means that any changes to font sizes or page orientations will not follow you from UI4 to UI5. If you notice that reports are printing incorrectly (margins cut off, a normally one-page document printing over multiple pages, etc.) try adjusting the print settings to what they were in UI4.



The image shows a dialog box titled "Export to PDF". Under the heading "Formatting Options", there are several settings:

- Font: A dropdown menu showing "Courier".
- Font Size: A text input field containing "8".
- Orientation: Radio buttons for "Portrait" and "Landscape", with "Landscape" selected.
- Paper Size: A dropdown menu.

At the bottom of the dialog, there are three buttons: "Create PDF", "Use Default", and "Cancel".

\*Example of export settings; recommended settings will differ between reports.

# Keyboard Shortcuts

Below is a list of Function Keys and Control Shortcuts that are available in UI 5. **Note that some shortcuts have changed.**

## **UI Feature Shortcuts**

The following shortcuts are available from most places in UI. **Note:** Some keyboard shortcuts have changed as of UI 5.7. Please review this list carefully.

Note: Some of these shortcuts may not work in all browsers. Browser plug-ins or other applications may override these shortcuts and activate different commands.

- Change focus to Search Box: **Ctrl+Alt+S**
- Toggle between Person and Form search in the Search Box: **Ctrl+Alt+S**
- Show Search Results dialog box: **Ctrl+Alt+R**
- Show Advanced Person Search dialog box: **Ctrl+Alt+A**
- Show Navigation dialog box: **Ctrl+Alt+N**
- Show Preferences dialog box: **Ctrl+Alt+C**
- Show the Settings menu: **Ctrl+Alt+U**
- Exit/Logout: **Ctrl+Alt+L**
- Show Favorites dialog box: **Ctrl+Alt+F**
- Show Help (for current UI area in focus): **Ctrl+Alt+H**
- Show the Help menu: **Ctrl+Alt+/ (forward slash)**
- Show Keyboard Shortcuts: **Ctrl+Alt+K**
- Show the Quick Tour video: **Ctrl+Alt+Q**
- Close an open dialog box (and return to the Search Box): **Esc**
- Move to the next focus spot: **Tab**
- Move to the previous focus spot: **Shift+Tab**

## **Field Text Editing Shortcuts**

The following shortcuts are available for text entry boxes:

- Select all text in input area: **Ctrl+A**
- Copy selected text: **Ctrl+C**
- Delete a character or selected text: **Delete**
- Cut selected text: **Shift+Delete or Ctrl+X**
- Paste text in clipboard: **Ctrl+V**
- Select text to end of field: **Shift+End**
- De-select a character: **Shift+Left Arrow**
- Select a character: **Shift+Right Arrow**
- Move to the beginning of the current input area: **Home**
- Move to the end of the current input area: **End**
- Move one character to the left: **Left Arrow**
- Move one character to the right: **Right Arrow**
- Move one word to the left: **Ctrl+Left Arrow**
- Move one word to the right: **Ctrl+Right Arrow**
- Undo last command: **Ctrl+Z**
- Redo last command: **Ctrl+Y**



## Context Area Shortcuts

The following shortcuts are for working with records in the Context Area:

- Toggle Context Keep Open/Auto Close: **Ctrl+Alt+O**
- Show Context Area help: **Ctrl+Alt+Y**
- View all records in Context Area (card selector drop-down): **Ctrl+Alt+1**
- Close current record in Context Area: **Ctrl+Alt+X**
- Close all records in Context Area: **Ctrl+Shift+X**
- Add current record in Context Area to Favorites: **Ctrl+Alt+V**
- Add all records in Context Area to Favorites: **Ctrl+Alt+2**
- Go to next record in Context Area: **Ctrl+. (dot)**
- Go to previous record in Context Area: **Ctrl+, (Comma)**
- Change focus to the Context Area (works even if no active context card is displayed): **Ctrl+Alt+W**

## Colleague Form Shortcuts

The keyboard shortcuts listed below are available only when working within a UI form or when a form is open (alternative keystroke combinations are separated by | ).

**Note:** Some of these shortcuts may not work in all browsers. Browser plug-ins or other applications may override these shortcuts and activate different commands.

### Field Movement Shortcuts

- Move to the next field: **Tab**
- Move to the previous field: **Shift+Tab**
- Move to the beginning of the current field: **Home**
- Move to the end of the current field: **End**
- Open a drop-down list to select a value: **Down Arrow**
- Scroll through the values in a drop-down list: **Up/Down Arrow**
- Select the highlighted value in the drop-down list: **Enter**
- Detail: **F2**

### Envision Table Shortcuts

- Move forward one row in a table: **Down Arrow\***
- Move back one row in a table: **Up Arrow\***
- Move forward one page in a table: **Page Up**
- Move backward one page in a table: **Page Down**
- Move to the first row of a table: **Ctrl+Home**
- Move to the last row of a table: **Ctrl+End**
- Field insert in a table: **Insert**
- Field delete in a table: **Ctrl+Alt+D**
- Export table contents to Excel: **Ctrl+Alt+E**

\*If the current field within a window has a drop-down list, use Down Arrow to open the list, **Up/Down Arrow** to move up and down within the list, and **Ctrl+Up** or **Ctrl+Down** to move back or forward one row.

### Form Shortcuts

- Save current form: **F9**
- Save all open forms: **Ctrl+Shift+F9** [NOTE: **Shift+F9** not available for Firefox]
- Cancel from current form: **F8** or **Ctrl+Alt+End**
- Cancel from all forms: **Ctrl+Shift+F8** [NOTE: Use **Shift+F8** not available for Firefox]
- Finish from current form: **Ctrl+F9**
- Move to the next form: **Ctrl+Alt+Dot**
- Move to the previous form: **Ctrl+Alt+Comma**
- Add current form to Favorites: **Ctrl+Alt+4**
- Record Delete (when allowed): **Ctrl+Alt+Z**
- Print active form: **Ctrl+Alt+P**
- Open external hyperlink associated to form: **Ctrl+Alt+G**
- Move focus to open UI form: **ESC** or **Ctrl+Alt+Home**

Help: **Ctrl+Alt+H** | **F1** (shows help for area currently in focus; **F1** may not work in all instances)

### **Search Results Shortcuts**

#### *Person and Other Search Results*

The keyboard shortcuts listed below are available only when working within a Search Results Panel that is **not Form Search**:

- Select all records: **FA**
- Add a new record, if available: **A**
- Jump to page containing result number  $n$ : **J n**
- Enter sort select criteria, if applicable: **S**
- Switch to Card View: **C**
- Switch to Grid View: **G**
- Export results to Excel: **E**
- Move to the next page of results: **PageDown**
- Move to the previous page of results: **PageUp**
- Move to the first page of results: **Home**
- Move to the last page of results: **End**
- Show these search input options: **?**

#### *Form Search Results*

The keyboard shortcuts listed below are available when focused on the Input box for a **Form Search Results** panel:

- Execute result  $n$ :  $n$  (enter the number)
- Jump to and focus on result number  $n$ : **J n**
- Move to the next page of results: **PageDown**
- Move to the previous page of results: **PageUp**
- Move to the first page of results: **Home**
- Move to the last page of results: **End**