

# Datatel Colleague UI

## Basic Quick Tips Sheet

### Logging In

Double-Click the **Datatel** icon to open the application.  
(On the Desktop, or go to START >> Programs >> Datatel >> Datatel)



Type your **Datatel/Colleague User ID and Password**, choosing the correct database if you have options.



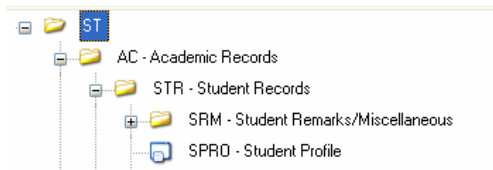
(Having trouble?? Call extension: XXXX)

### Navigating

There are numerous ways to navigate. Here are a few...

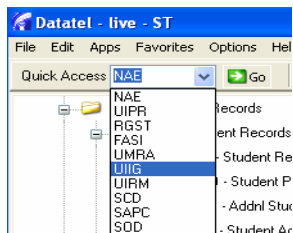
#### Tree Menu

Click the + signs to expand the folder structure.  
Double-click the desired mnemonic.



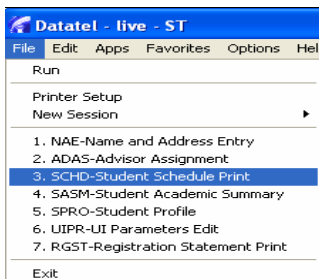
#### Quick Access

Type a mnemonic in the **Quick Access** field, or use the drop-down list to select a previously typed mnemonic.



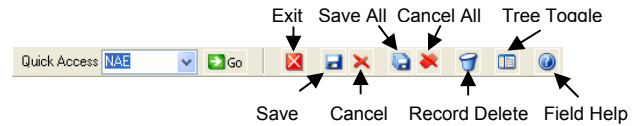
#### File Menu:

Click on **File** to get a list of the ten most recently viewed forms and select one from the list.



### Performing Tasks

#### The Toolbar



#### Save & Cancel:

Saves or cancels changes to current form.

#### Save All & Cancel All:

Saves or cancels all changes to every open form.

#### Record Delete:

Deletes an entire record – limited availability.

#### Tree Toggle:

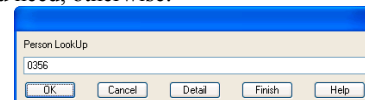
Toggles the left hand tree menu on and off.

#### Field Help:

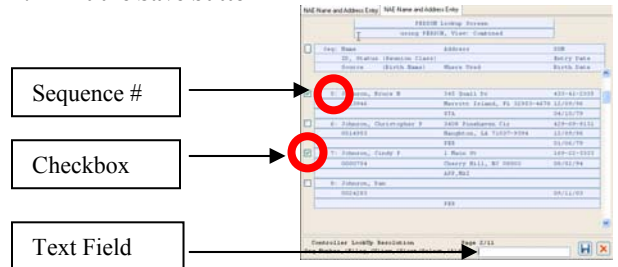
Information about highlighted field.

#### Using Lookup

Simply enter the ID or key at the **Lookup** prompt if you know the record you need, otherwise:



1. Enter partial record ID and click OK or <RETERUN>
- OR
2. Enter the sequence # in the text field at the bottom.
3. Check the boxes next to the desired records
- THEN 4. Hit the Save button



#### Basic Lookup Shortcuts

##### The "at" Sign ( @ )

Brings up the last record you displayed during the current login session. Clears after you exit the session.

##### The ellipsis ( ... )

Lists ALL records for the appropriate for the form. Cannot be used with huge files like PERSON.

### Getting Help

#### Internal System Help

Choose **Help >> Field Help** from the main menu, or toolbar as shown in the Toolbar section.

- Gives info about a highlighted field and field name.

Choose **Help >> Process Help** from the main menu.

- Gives basic overview of the process & program name.

#### Help Desk

For further help, contact the Help Desk @ extension 5000