

In advising, as in chess, forethought wins.

Durham Technical Community College

Advisor Training Manual

A Step by Step Guide to Using Colleague for Advising

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What is Datatel Colleague?

Datatel Colleague is an advanced enterprise resource planning solution designed specifically for higher education.

DATATEL: Name of the software company

COLLEAGUE: Name of the software

CIS: Name of the implementation project

Colleague Advising Tools

Just as in the past with UNIX, Colleague will be used to access:

- Student Information
 - *Program, Assigned Advisor, Telephone Number, and Address*
- Placement Test Scores
- Student Transcripts**
- Student Schedules
- Student Personal Identification Numbers (PINs)
- Class Rosters
- Assigned Advisee Listing

For students who have been admitted prior to Fall 2007 you will need to access UNIX for student transcripts until the student transcript conversion has been completed.

How to Login to Colleague

The “How to Login to Colleague” section will provide you step-by-step directions on how to log on to the Colleague system. Before you begin this section, be sure that you have...

- Datatel on your office computer
- Your Colleague login user name and password

Please contact ITSD at 919-686-3600 if you are having difficulties or do not remember your login information

Step One: Open Datatel

From your computer desktop, double click the **Datatel** icon

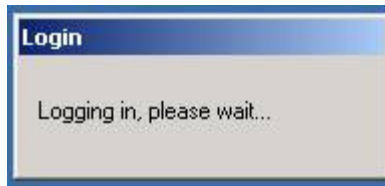


Step Two: Enter your User ID & Password

When the Datatel Login box appears, it will ask you to enter a User ID, Password and Database. Enter your **User ID** on the first line and your **Password** on the second line. For training purposes your only database option will be coltest. As fall 2007 advising begins, a second database option, collive, will be become your primary database. Then select **OK**.



After you enter your User ID and Password, it will take a few moments for Datatel to open.

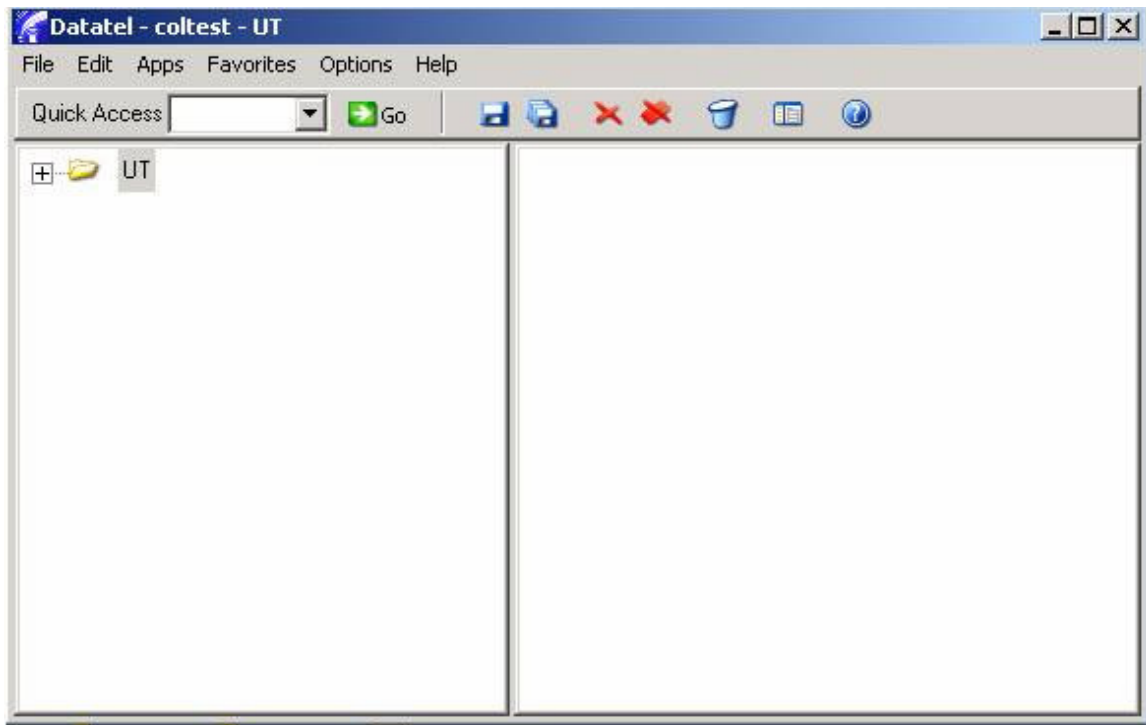


You will be prompted to change your Password as you login the first time. Your new Password must be at least 8 characters and include at least one number. Passwords must be lowercase. Periodically the system will ask you to change your Password.

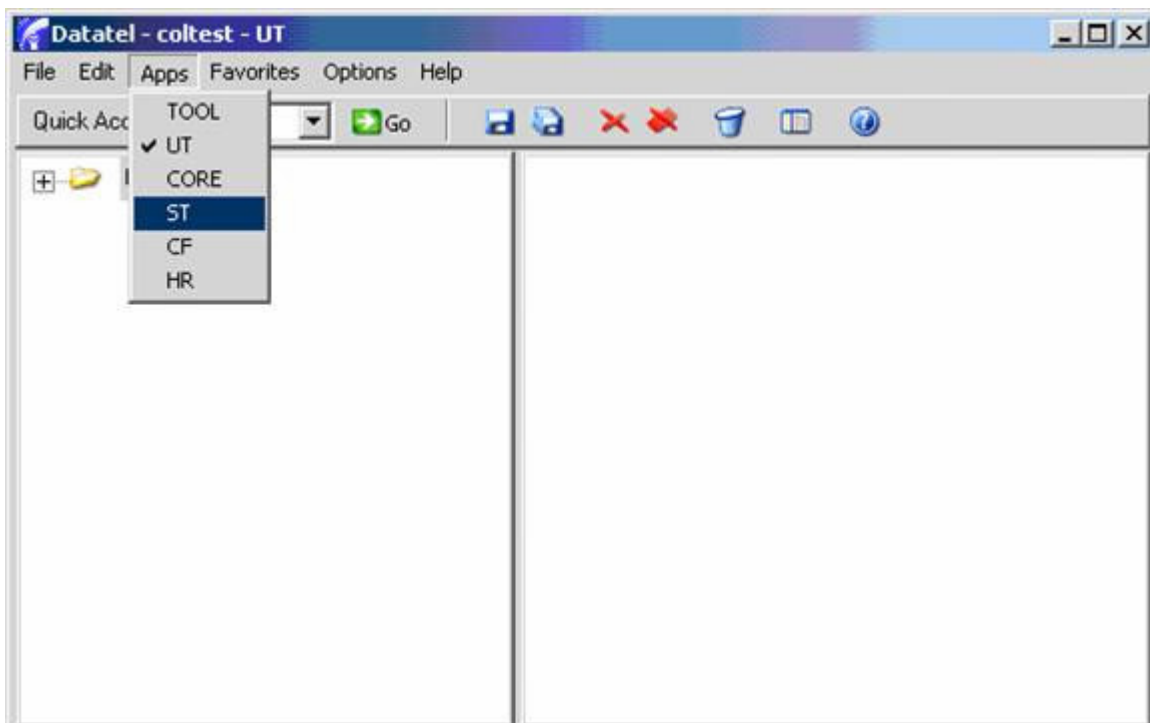
Password Example: dtccisgr8

Step Three: Access ST Menu

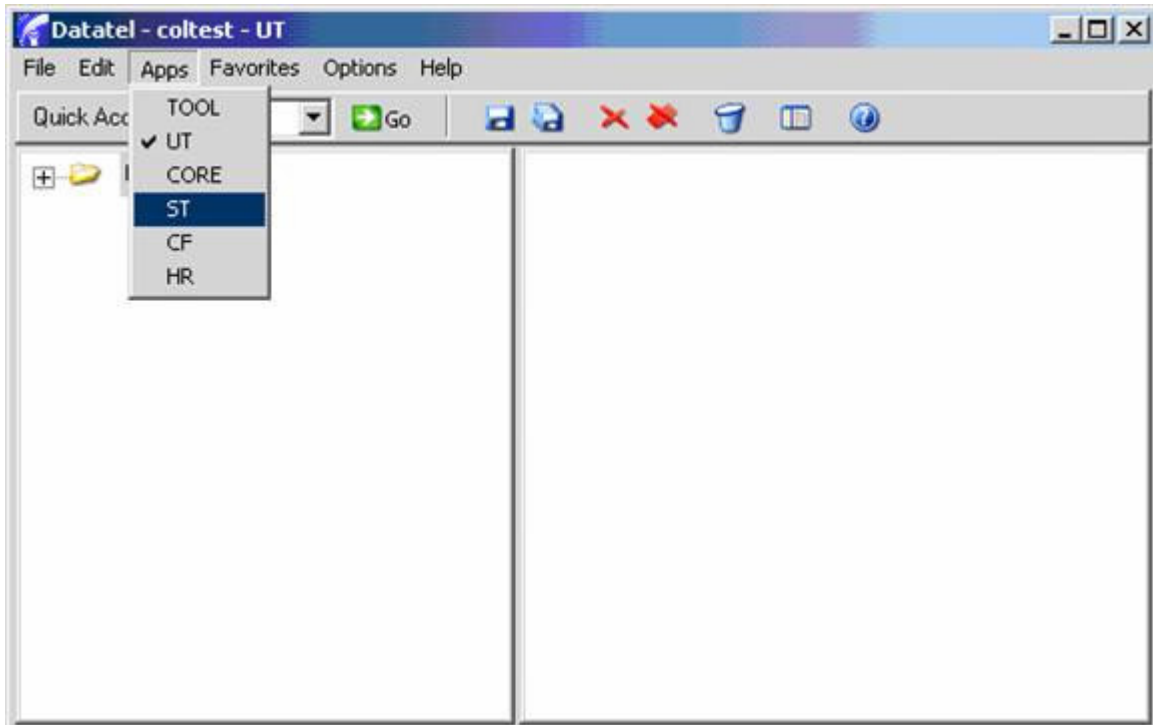
Once logged in to Datatel, you begin with this screen:



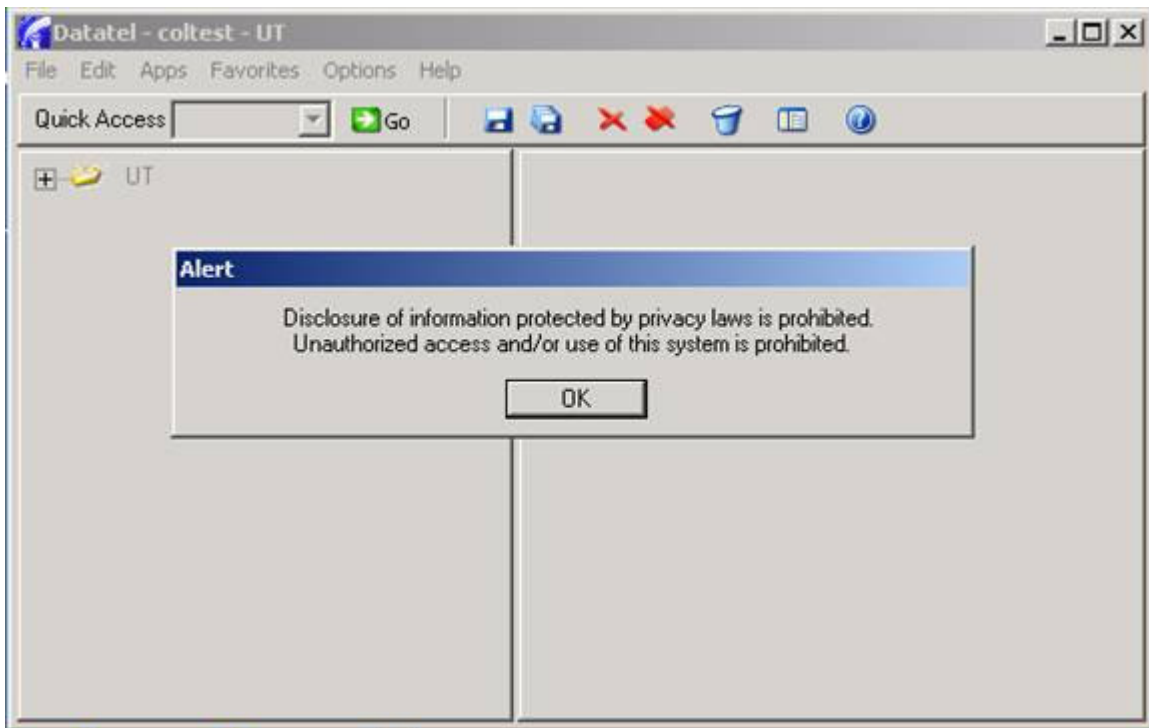
To access Colleague, advisors need to be on the ST menu. To access the ST menu, first select **APPS** from the file menu, then select **ST**.



This process has to be completed twice due to a bug in the system, so again select **APPS** from the file menu, then select **ST**.



Before Datatel opens the ST menu, you will receive the Alert message below, click **OK**.



Navigating Colleague

Navigating Colleague: Title Bar, Menu Bar, and Tool Bar



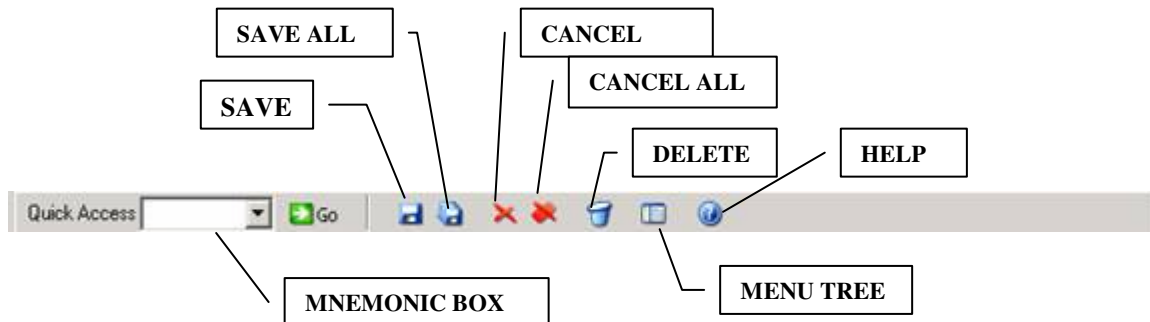
On every screen in Colleague, at the top of the page you can always find the **Title Bar**, the **Menu Bar**, and the **Tool Bar**.



The **Title Bar** includes information on the **Current Application** (Datatel), **Account** (coltest), and **Module** (ST). The Title Bar is for information purposes only.



The **Menu Bar** includes **File** (includes Datatel exit option), **Edit** (cut, copy and paste options), **Apps** (which you will only use when you sign in to Datatel to select the ST module), **Favorites**, **Options**, and **Help**



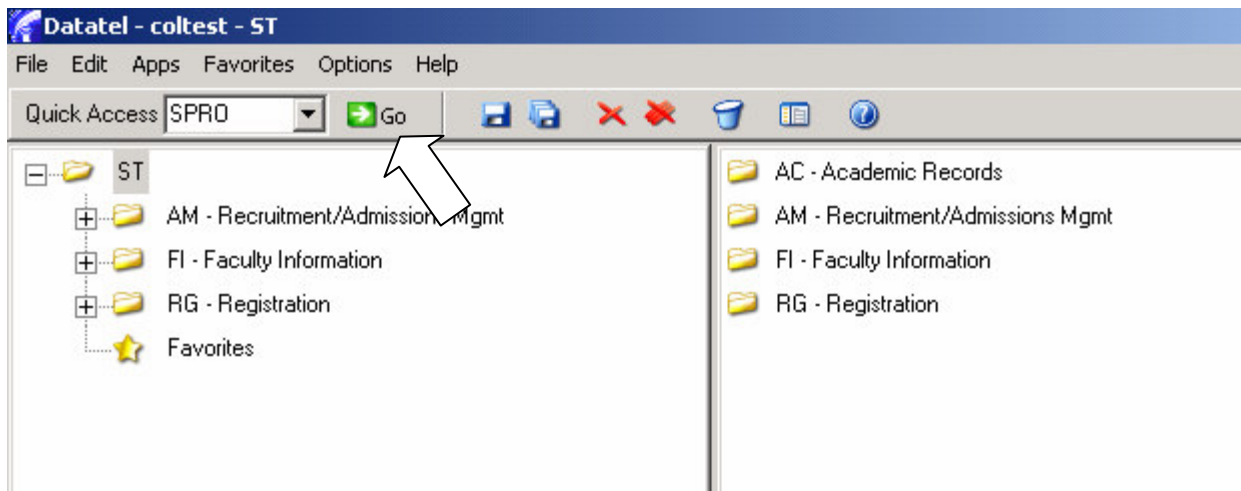
The **Tool Bar** provides several user options including Quick Access to Colleague screens, saving, canceling, and help options.

- The Quick Access “Mnemonic Box” allows you to quickly access the Colleague screen you need. All Colleague screens can be accessed with a four letter mnemonic. For example, the student data screen in Colleague can be accessed with the mnemonic SPRO.
- The first icon looks like a floppy disk. This allows you to **SAVE** the information in the screen you are working with.
- The second icon looks like several floppy disks. This allows you to **SAVE ALL** the information you are working with in various screens.
- The third icon is a red X. This allows you to **CANCEL** the screen you are working in.
- The fourth icon is several red Xs. This allows you to **CANCEL ALL** the screens you are working with.
- The fifth icon looks like a trash can. This allows authorized users to **DELETE RECORD**.
- The sixth icon looks like a menu. This allows you to **SHOW/HIDE TREE MENU**.
The seventh icon is a question mark. This allows you to access the **HELP** feature.

How to Access Student Data

Student data (including program, advisor, phone number) is located in the Student Profile section of Colleague. The Student Profile mnemonic is **SPRO**.

Step One: Access SPRO Screen



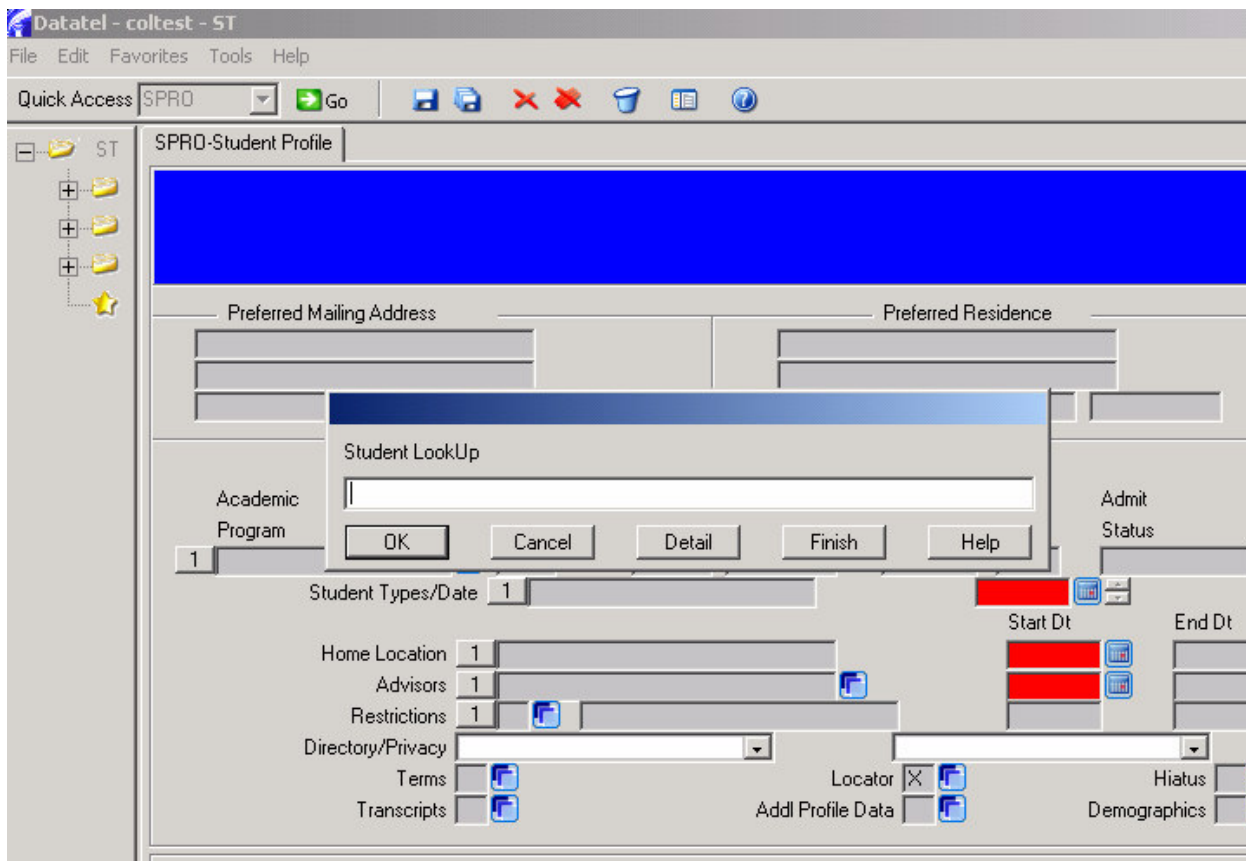
To access the Student Profile screen, type **SPRO** in the mnemonic box (located on the Tool Bar), and then click the **GO** button.

Step Two: Select Student Record (Student Look Up)

Using Colleague, you can select a student's record two ways:

- Last Name, First Name
- Colleague Student ID Number

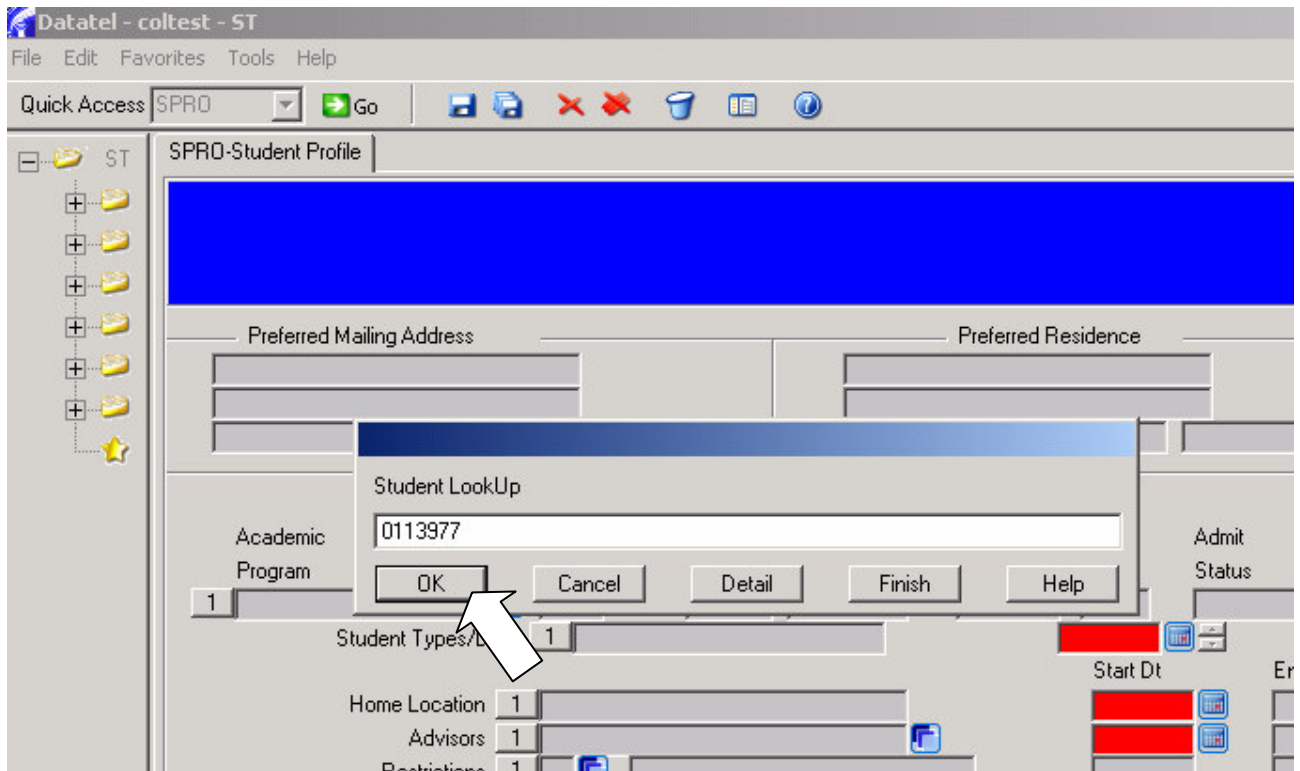
With the Colleague system, all students will be assigned a seven digit student ID number. The student ID number will replace the social security number in pulling up student information. After you entered **SPRO** in the mnemonics box and selected the **GO** button, the **Student Look Up** box will appear.



****Note**** Only one Colleague user can access a student's record at a time.

Student Look Up by Student ID Number

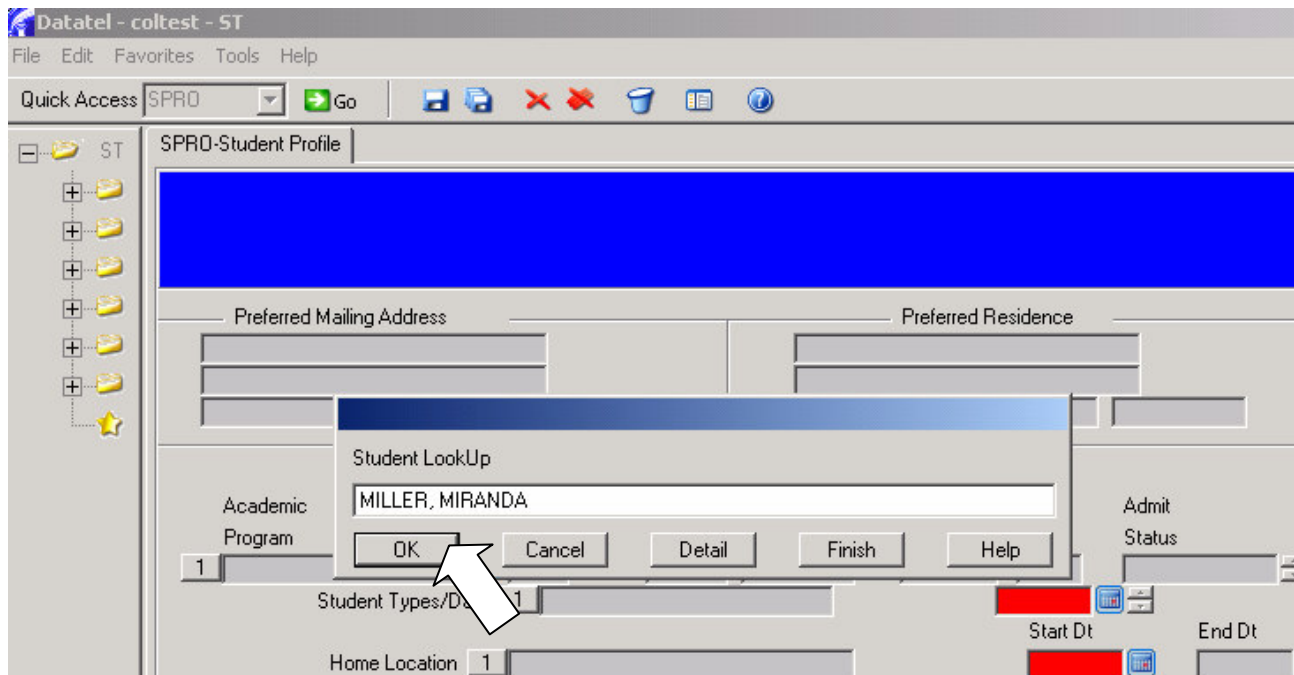
In the **Student Look Up** box, enter in the student's seven digit Student ID Number, then click **OK**



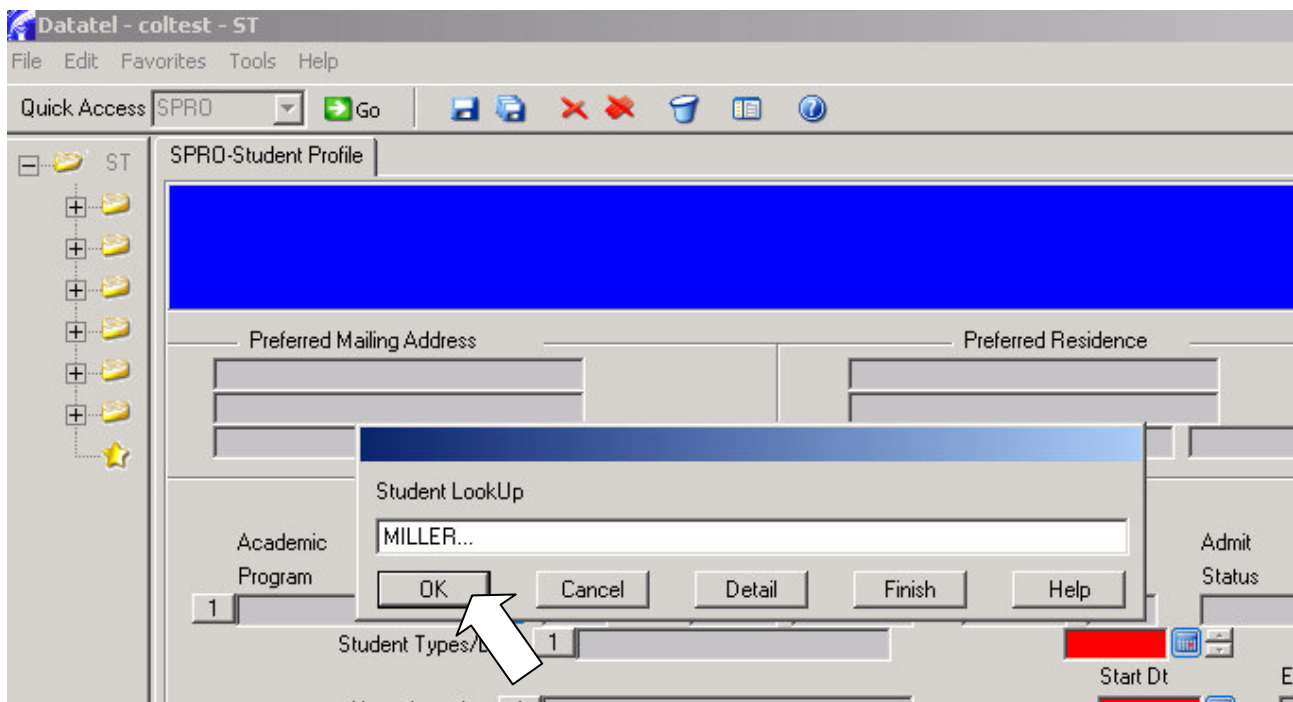
After clicking **OK** you will be directly linked to the student's record.

Student Look Up by Name

In the **Student Look Up** box, enter in the student's last name, then a comma, then the student's first name. (ex. Miller, Miranda) Then click **OK**.



You can also search for a student's record by last name, or the first few letters of a student's last name. In the **Student Look Up** box, enter in the student's last name, or just the first few letters of the last name, and then type three periods (...). Then click **OK**.



This will search the database and pull up all students with the same last name as the one entered or all the last names that begin with the letters you enter. For example, if you entered in **HAR...** it would bring up student records with the last name Harris, Harrison, Hart, Harvey.

Using either **Student Look Up** by Name methods (entering Last Name, First Name or partial name and ...), after you click **OK** you will be brought to a screen to select and confirm the student record you are looking up. Depending on how much information you entered, you may have to scroll through several screens before finding the student's name and record for which you are searching.

PERSON Lookup Screen
using PERSON, View: Combined

Seq	Name	Address	SSN
	ID, Status (Reunion Class)		Entry Date
	Source (Birth Name)	Where Used	Birth Date
1:	Cheasty-Miller, Patrice	3 Hardscrabb Dr	459
	16303	Hillsborough, NC 2727	04/21/06
		STU	#####
2:	Miller, Adrienne	15 W Weave St	311
	11184	Durham, NC 2770	04/18/06
		MAI,STU,FIN	#####
3:	Miller, Alan	703 Orange Grov Rd	582
	11372	Hillsborough, NC 2727	04/18/06
		STU	#####
4:	Miller, Andre	506 Stonegat Dr	1165
	15078	Durham, NC 2770	04/20/06
		STU	#####

Use the scroll bar to scroll down to find the student's name

Controller LookUp Resolution Page 1/32
Seq Number, (F)lag, (V)iew, (S)ort/Select:

After you have located your student's name, there are several ways to select and confirm that this is the student record you need.

The screenshot shows a web browser window titled "Datatel - coltest - ST". The browser's address bar shows "Quick Access SPRO". The page title is "PERSON Lookup Screen using PERSON, View: Combined". Below the title is a table with columns: Seq, Name, Address, SSN, ID, Status (Reunion Class), Entry Date, Source, (Birth Name), Where Used, and Birth Date. The table contains several rows, with the first row (Seq: 57) selected, indicated by a checkmark in a white box to its left. The selected row details are: Name: Miller, Miranda Leigh; Address: 5 Bypass Lane, Chapel Hill, NC 2751; SSN: 482; Entry Date: 04/18/06; Source: MAI, PER, STU, FIN, APP; Birth Date: #####. Other rows include: Seq: 58, Miller, Norwood A., 500 Lansdowne Dr, Durham, NC 2771, 902, 04/08/03, HRP, EMP, #####; Seq: 59, Miller, Paul J, 573 Canadian Mist Lane, Holly Springs, NC 2754, 517, 04/20/06, STU, #####; Seq: 60, Miller, Rai Anne, 41 Dixie Lane, Youngsville, NC 2759, 979, 04/20/06, STU, #####. At the bottom of the screen, there is a "Controller LookUp Resolution" section with a "Page 15/32" indicator and a "Seq Number, (F)lag, (V)iew, (S)ort/Select:" input field containing the number "57". There are also "Save" and "Close" icons in the bottom right corner.

Option # 1-Point & Click

First you can **left click** the white box to the left of the student's name. A **check mark** will appear confirming that this is the record that you have selected. After you have made your selection, you will need to **SAVE** your selection. Click the **SAVE** icon on the **Tool Bar** or there is a second **SAVE** icon at the bottom right hand corner of the screen. After clicking **SAVE**, you will be directly linked to the student's record.

Option # 2-Keyboard

You can also select and confirm the student's record by entering the line item number before the student's name in the white box at the bottom of the page. After you have entered the line item number, select the **Enter** key and you will be directly linked to the student's record.

Step Two: Select Student Record will be an important step in all student related screens you will access. The same methods of student record selection explained here will also be used to pull up the student's test scores, transcripts, and schedule.

Step Three: Student Record Overview

The screenshot shows the 'SPRO-Student Profile' window for Miranda L. Miller. The interface includes a menu bar (File, Edit, Favorites, Tools, Help), a Quick Access bar with 'SPRO' and a 'Go' button, and a main content area with several sections:

- Header:** Student Name (Miller, Miranda L.), ID (0113977), SSN (###-###-###-###), and Home Phone (919-###-###-295).
- Address:** Preferred Mailing Address and Preferred Residence, both showing '5 Bypass, Chapel Hill, NC 27514'.
- Academic Program:** A table with columns for Academic Program, Cust, Acad Level, Status, Date, Cmpl Date, and Admit Status. The first row shows '1 A10100', 'No', 'CU', 'Active', '03/05/07', and 'Transfer'.
- Advisor:** Home Location (1 MC Main Campus), Advisors (1 Peter W. Wooldridge), and Restrictions (1).
- Start/End Dates:** Start Dt (08/01/06), End Dt (03/16/07), and another date (08/15/06).
- Other Fields:** Directory/Privacy, Terms, Transcripts, Locator, Addl Profile Data, Hiatus, and Demographics.

Callouts in purple boxes with white arrows point to the following fields:

- Colleague ID Number:** Points to the ID field (0113977).
- Phone Number:** Points to the Home Phone field (919-###-###-295).
- Address:** Points to the Preferred Mailing Address field.
- Academic Program:** Points to the Academic Program field (A10100).
- Advisor:** Points to the Advisors field (Peter W. Wooldridge).

Once you have arrived at the student's record, you have read access to the following information:

- Student's Name
- Student's Phone Number
- Student's Academic Program*
- Student's Advisor
- Student's Address

Admissions Status

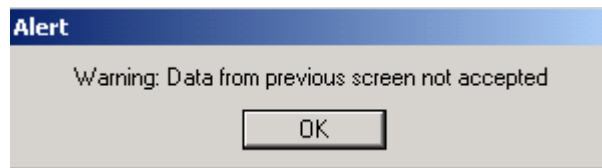
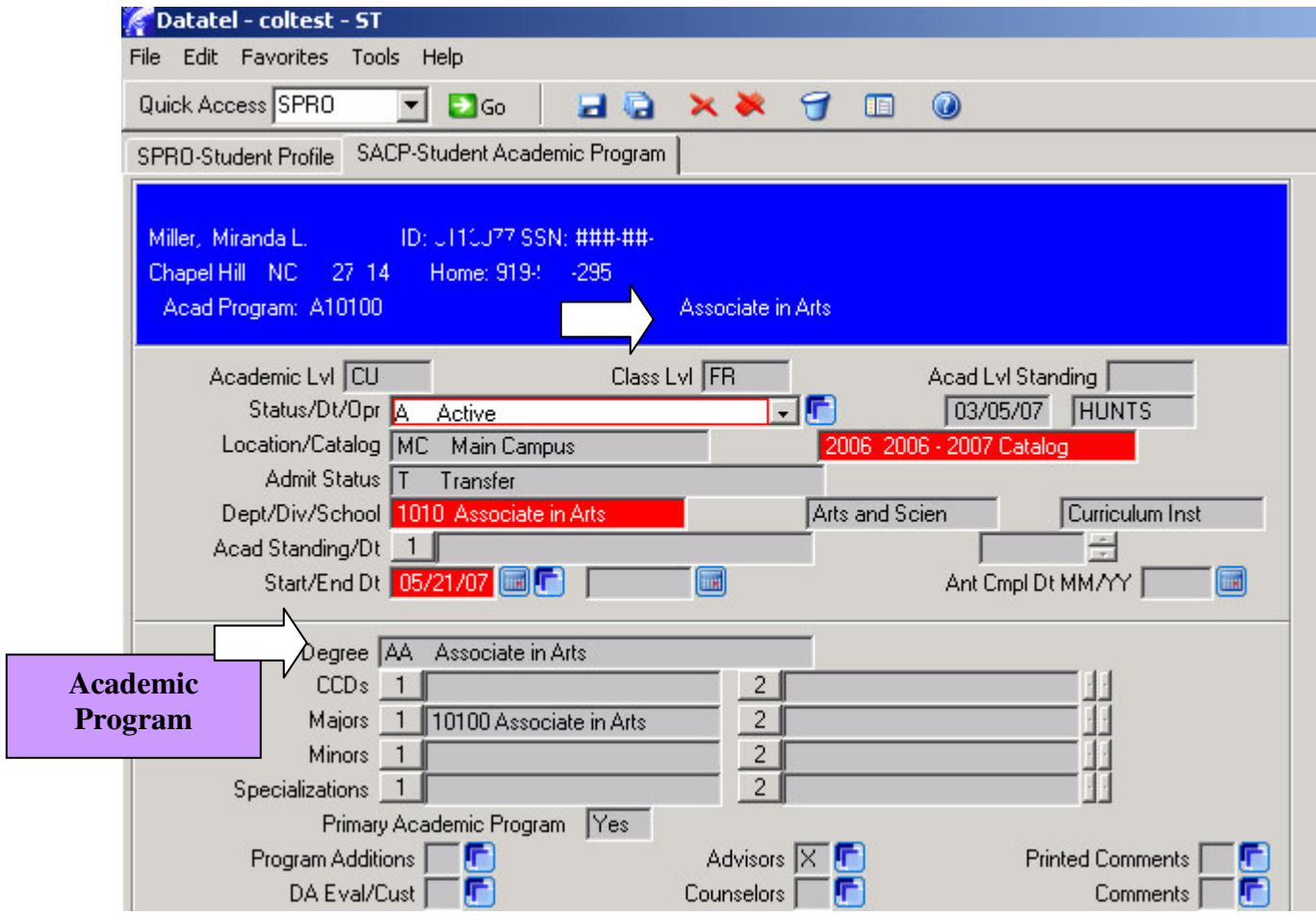
All students that have applied for admissions will have the program they applied for indicated under "Academic Program" even though they may have not been accepted into the program yet. If the student has not been officially admitted into the program, under "Restrictions" it will have **AD Applied/Not Admitted** listed (see example below). The student will also not have an assigned advisor listed.

The screenshot shows a close-up of the 'Restrictions' field. The value is 'AD Applied/Not Admitted' with a date of '03/23/07'.

If a student needs to change their major, please refer the student to the Admissions Office, 1210 Wynn Student Services Center.

*The student's Academic Program on the Student Profile screen (**SPRO**) is listed as the Program of Study code (ex. A10100 represents Associate in Arts Degree). To see the name of the certificate, diploma, or degree, **click** the Detail button (blue box) to the right of the Academic Program code.

You will be linked to the Student Academic Program screen (SACP) and the degree will be listed on the bottom half of the screen. To return to the **SPRO** screen, click the single red **X** icon on the **Tool Bar** to **CANCEL**. An Alert box will appear before returning to the **SPRO** screen, just click **OK**



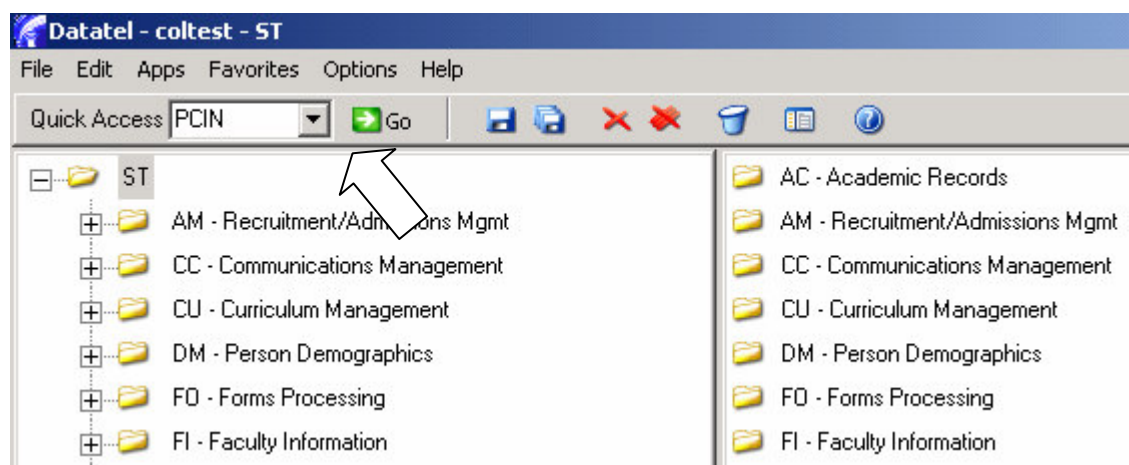
Step Four: Exit SPRO

After you are finished with the **Student Profile** screen, you can select the **CANCEL ALL** icon (multiple red **X**'s on the **Tool Bar**) to exit SRPO and return to the main menu.

How to Access Specific Student Data (Email & Telephone Number)

As we just covered, SPRO provides plenty of student information, but if you need just a student's email address or telephone number, you can quickly access those pieces of information through the **Person Contact Information** screen. The mnemonic for the **Person Contact Information** screen is **PCIN**.

Step One: Access PCIN

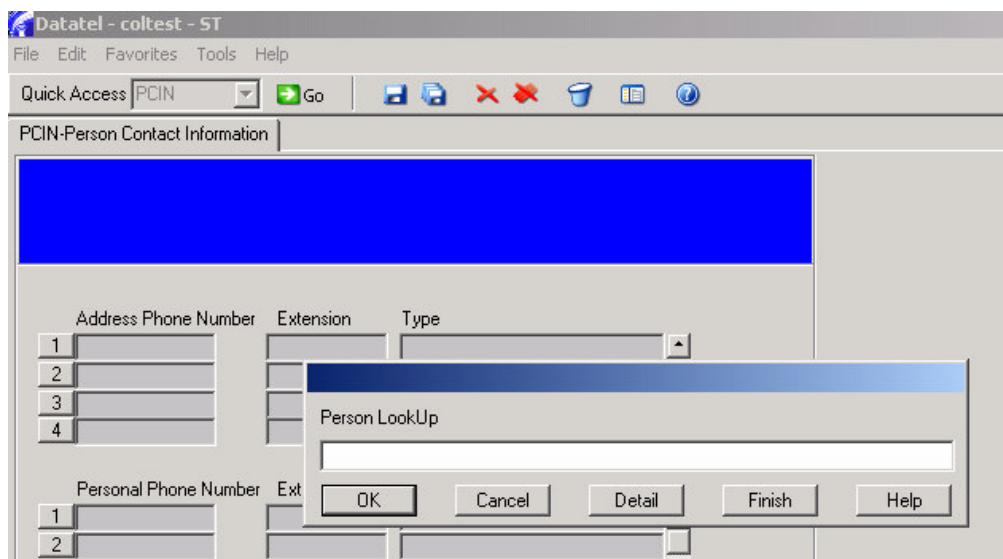


To access the Person Contact Information screen, type **PCIN** in the mnemonic box (located on the Tool Bar), and then click the **GO** button.

Step Two: Select Student Record (Person Look Up)

As with the Student Look Up section of the Colleague, you will need to select a student's record to access the Person Contact Information screen. Please refer back to pages 10-14 to review the student record selection process. The same methods of student record selection will also be used to access a student's transcripts, test scores, and schedule.

After you enter **PCIN** in the mnemonics box and click **GO**, you will arrive at the **Person Look Up** screen.



Remember that using Colleague, you can select a student's record two ways:

- Last Name, First Name
- Student ID Number

Step Three: View Student Email Address & Telephone Number

The screenshot shows the 'Datatel - coltest - ST' application window. The title bar includes 'File Edit Favorites Tools Help'. The 'Quick Access' bar shows 'PCIN' selected. The main content area is titled 'PCIN-Person Contact Information' and displays the following information:

Bajani, Kanye J. ID: 0169828 SSN: ###-##-###
Raleigh NC 2761 Home: 919-783

Address	Phone Number	Extension	Type
1			
2			
3			
4			

Personal	Phone Number	Extension	Type
1	919-783-8681		Home
2			
3			

E-Mail Type	E-Mail Address
1	P thabita_bajani@yahoo.com
2	
3	

Controller Address Phones: No Values

Step Four: Exit PCIN

After you are finished with the Person Contact Information screen, you can select the **CANCEL ALL** icon on the **Tool Bar** to exit **PCIN** and return to the main menu.

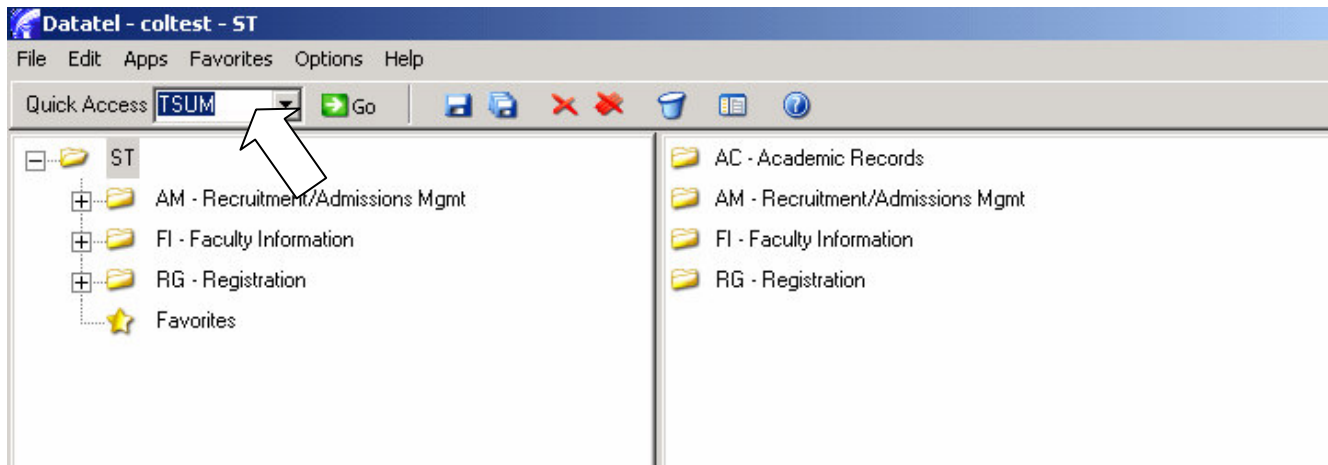
How to Access Test Scores

This section will review how to access student test scores including:

- Placement Test Scores
- SAT & ACT Scores
- Advanced Math Placement Test Scores
- Computer Competency Test Scores

Test Scores are located in the Test Summary section of Colleague. The Test Summary mnemonic is **TSUM**.

Step One: Access TSUM Screen

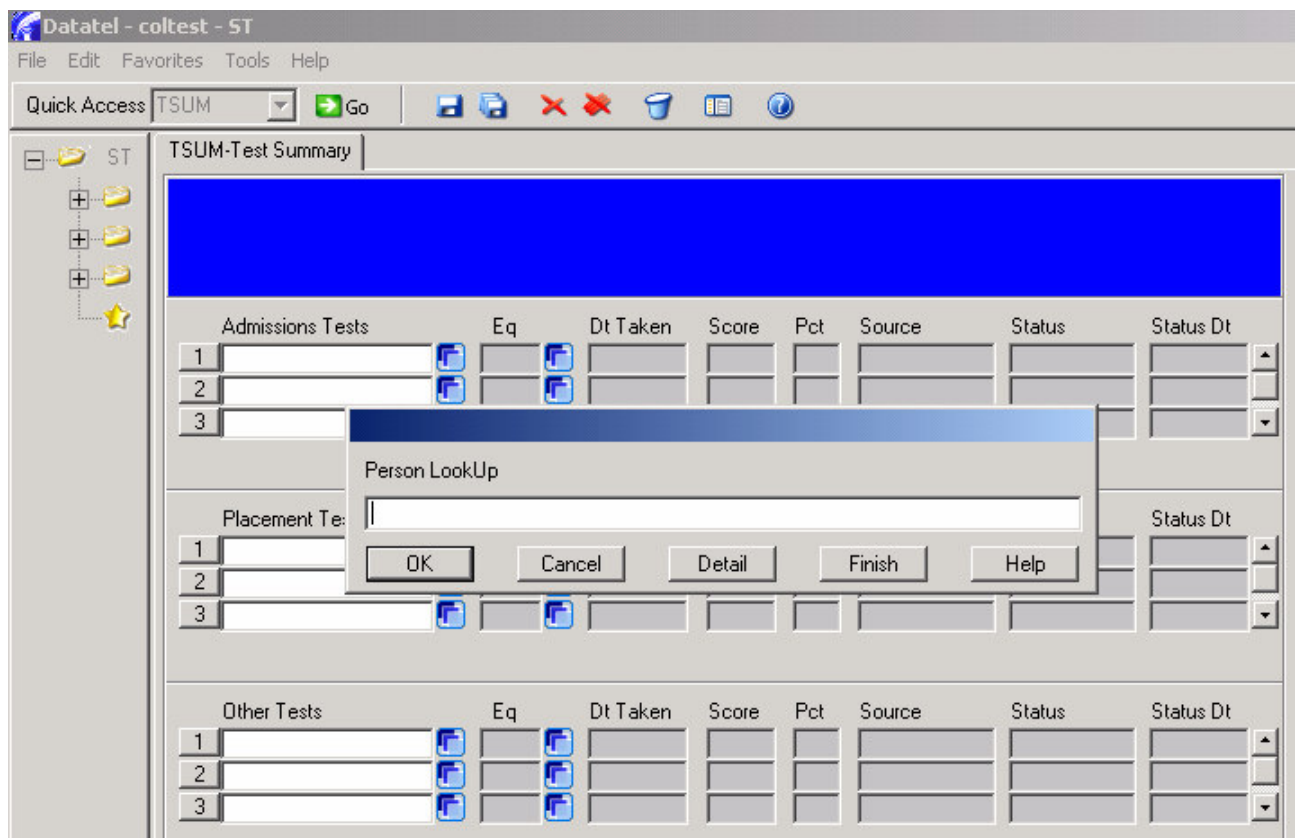


To access the Test Summary screen, type **TSUM** in the mnemonic box (located on the **Tool Bar**), and then click the **GO** button.

Step Two: Select Student Record (Person Look Up)

As with the Student Look Up section of the Colleague, you will need to select a student's record to access their test scores. Please refer back to pages 10-14 to review the student record selection process. The same methods of student record selection will also be used to access a student's transcripts and schedule.

After you enter **TSUM** in the mnemonics box and click **GO**, you will arrive at the **Person Look Up** screen.



Remember that using Colleague, you can select a student's record two ways:

- Last Name, First Name
- Student ID Number

Step Three: Test Score Overview

Placement Test Scores

Datatel - coltest - ST

File Edit Favorites Tools Help

Quick Access TSUM Go

TSUM-Test Summary

Johnson, Carmel ID: 01E^95, SSN: ###-##
Durham NC 27707 Home: 919-6^2-

Admissions Tests	Eq	Dt Taken	Score	Pct	Source	Status	Status Dt
1							
2							
3							

Placement Tests	Eq	Dt Taken	Score	Pct	Source	Status	Status Dt
1 ASSET Elementary	No	12/16/03	40		TC	A	12/14/06
2 ASSET Numerical	No	12/11/03	41		TC	A	12/14/06
3 ASSET Reading	No	12/11/03	45		TC	A	12/14/06

Other Tests	Eq	Dt Taken	Score	Pct	Source	Status	Status Dt
1							
2							
3							

After you have selected your student, you will be brought the **Test Summary** screen (**TSUM**). The Test Summary screen has three sets of boxes, Admissions Test, Placement Tests, and Other Tests.

Placement Test scores is where the scores for ASSET, COMPASS, SAT and ACT, and Advanced Math Placement will be listed. Other Tests is where Computer Competency scores will be listed.

Placement Tests is the second set of boxes on the **TSUM** screen. Information listed under this section includes:

- Type of Placement Test (ASSET, COMPASS, SAT, ACT)
- Date Taken
- Score
- Source (TC=Test Center OTC=Other College Testing Center)

You will also notice to the far right of the screen of the Placement Tests section there is a scroll bar. Since the screen only allows three Placement Tests to be listed at a time, **remember to use the scroll bar on the right hand side to scroll down to see additional test scores!**

Datatel - coltest - ST

File Edit Favorites Tools Help

Quick Access TSUM Go

TSUM-Test Summary

Johnson, Carmel ID: 0159051 SSN: ###-##-106J
 Durham NC 27707 Home: 919-672-1815

Admissions Tests	Eq	Dt Taken	Score	Pct	Source	Status	Status Dt
1							
2							

Placement Test Type and Section:

Placement Test Score

Placement Tests	Eq	Dt Taken	Score	Pct	Source	Status	Status Dt
4	ASSET Writing	No	12/11/03	46	TC	A	12/14/06
5							
6							

Use the scroll bar to scroll up and down and view additional placement test scores

Other Tests	Eq	Dt Taken	Score	Pct	Source	Status	Status Dt
1							
2							
3							

SAT & ACT Scores

SAT and ACT scores are also located in the Placement Tests, the second set of boxes on the **TSUM** screen. Information listed under this section includes:

- Type of Placement Test (SAT and ACT)
- Date Taken
- Score
 - o SAT 500 and higher on Writing and Critical Reading = ENG 111
 - o SAT 500 and higher on Math = College-Level Math
 - o ACT 20 and higher on English = ENG 111
 - o ACT 20 and higher on Math = College-Level Math
 - o Scores lower than 500 on SAT or ACT will need to complete the placement test.

You will also notice to the far right of the screen of the Placement Tests section there is a scroll bar. Since the screen only allows three Placement Tests to be listed at a time, **remember to use the scroll bar on the right hand side to scroll down to see additional test scores!**

Placement Tests	Eq	Dt Taken	Score	Pct	Source	Status	Status Dt
1	ASSET Numerical	No	02/05/07	41		A	02/05/07
2	SAT Math	No	03/06/07	580		A	03/06/07
3	SAT Reading	No	03/06/07	520			

Advanced Math Placement

Advanced Math Placement test scores are also located in the Placement Tests, the second set of boxes on the **TSUM** screen. Information listed under this section includes:

- Type of Placement Test (COMPASS College Algebra, COMPASS Trigonometry)
- Date Taken
- Score
 - o College Algebra 0-49 MAT 171 Precalculus Algebra
 - o College Algebra 50-100 MAT 172 Precalculus Trigonometry
 - o Trigonometry 0-47 Mat 172 Precalculus Trigonometry and/or MAT 263 Brief Calculus
 - o Trigonometry 48-100 MAT 271 Calculus 1

You will also notice to the far right of the screen of the Placement Tests section there is a scroll bar. Since the screen only allows three Placement Tests to be listed at a time, **remember to use the scroll bar on the right hand side to scroll down to see additional test scores!**

Placement Tests	Eq	Dt Taken	Score	Pct	Source	Status	Status Dt
1 COMPASS College A	Yes	03/06/07	62			A	03/06/07
2 COMPASS Trigonome	No	03/06/07	40			A	03/06/07
3							

Computer Competency Scores

Other Tests is the third set of boxes on the **TSUM** screen. Information listed under this section includes:

- Type of Other Test (Computer Competency)
- Date Taken
- Score (80 and above=Pass)

You will also notice to the far right of the screen of the Other Tests section there is a scroll bar. Since the screen only allows three Other Tests scores to be listed at a time, **remember to use the scroll bar on the right hand side to scroll down to see additional test scores!**

Computer Competency Pass Example:

Other Tests	Eq	Dt Taken	Score	Pct	Source	Status	Status Dt
1 Computer Competen	No	03/06/07	87			P	03/06/07
2							
3							

Computer Competency Did Not Pass Example:

Other Tests	Eq	Dt Taken	Score	Pct	Source	Status	Status Dt
1 Computer Competen	No	03/06/07	72			NP	03/06/07
2							
3							

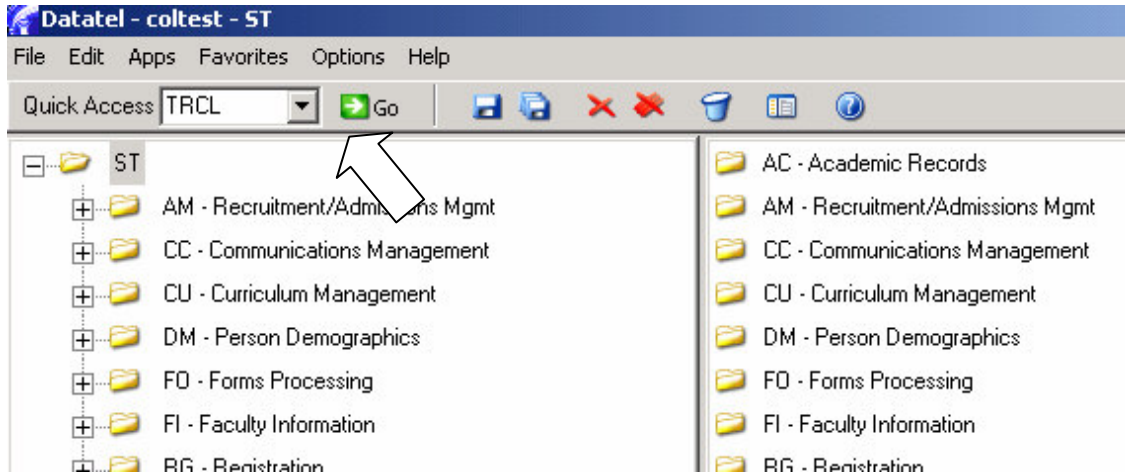
Step Four: Exit TSUM

After you are finished with the Test Summary screen, you can select the **CANCEL ALL** icon on the **Tool Bar** to exit **TSUM** and return to the main menu.

How to Access Student Transcripts

Student transcripts can be accessed through two different screens in Colleague, one that allows you view transcripts (Transcript Course Listing) and one that allows you to view and print transcripts (Transcript Print). The Student Transcript mnemonics are **TRCL** and **TRAN**. **** Transcripts will not be available until the transcript conversion is completed. Use UNIX to look up transcripts on all returning students.****

Step One: Access TRCL Screen

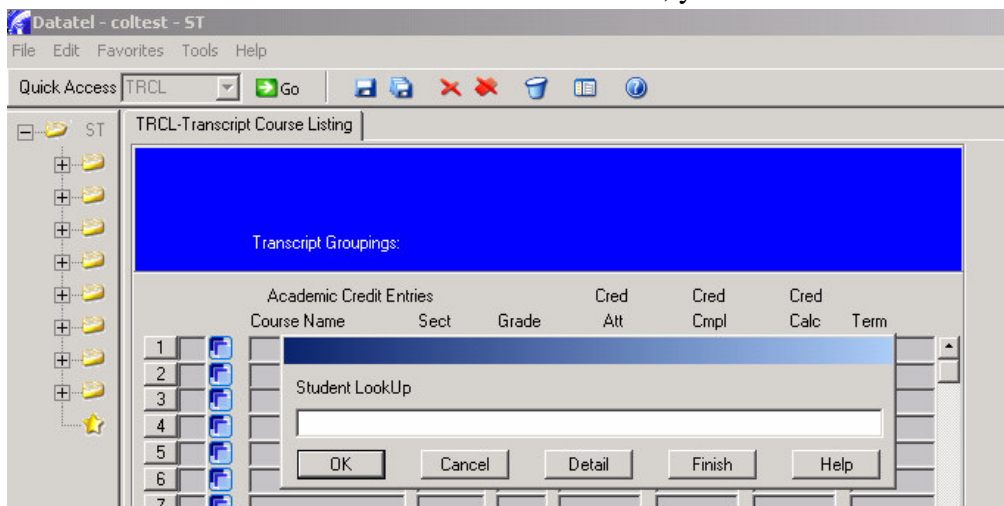


To access the Student Academic Credits screen, type **TRCL** in the mnemonic box (located on the **Tool Bar**), and then click the **GO** button.

Step Two: Select Student Record (Student Look Up)

As with the Student Look Up section of the Colleague, you will need to select a student's record to access their transcripts. Please refer back to pages 10-14 to review the student record selection process. The same methods of student record selection will also be used to access a student's test scores and schedule.

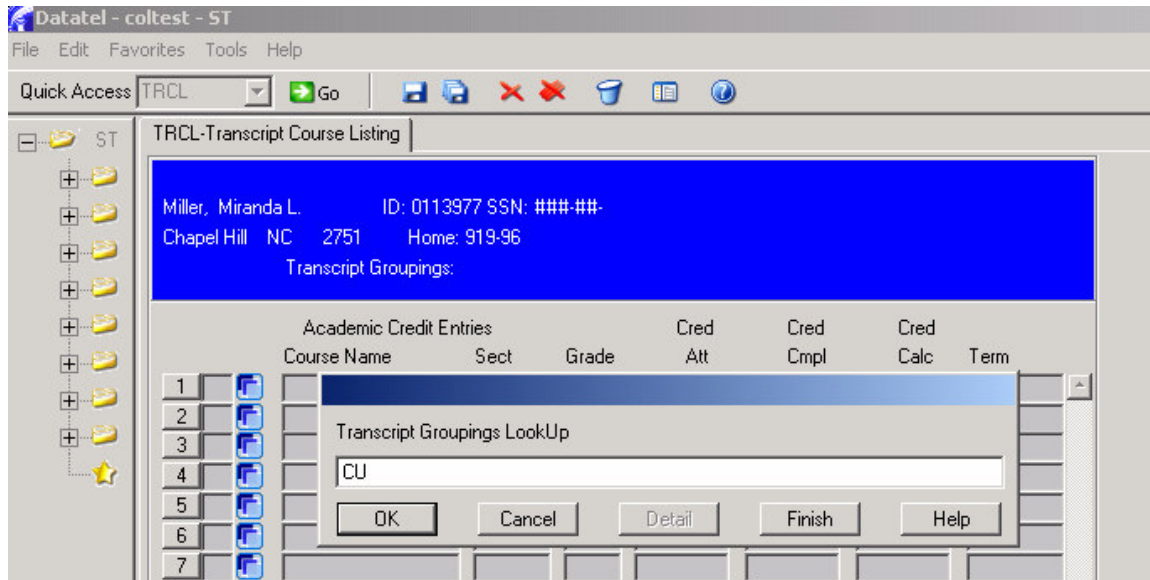
After you enter **TRCL** in the mnemonics box and click **GO**, you will arrive at the **Student Look Up** screen.



Remember that using Colleague, you can select a student's record two ways:

- Last Name, First Name
- Student ID Number

Step Three: Transcript Groupings Look Up



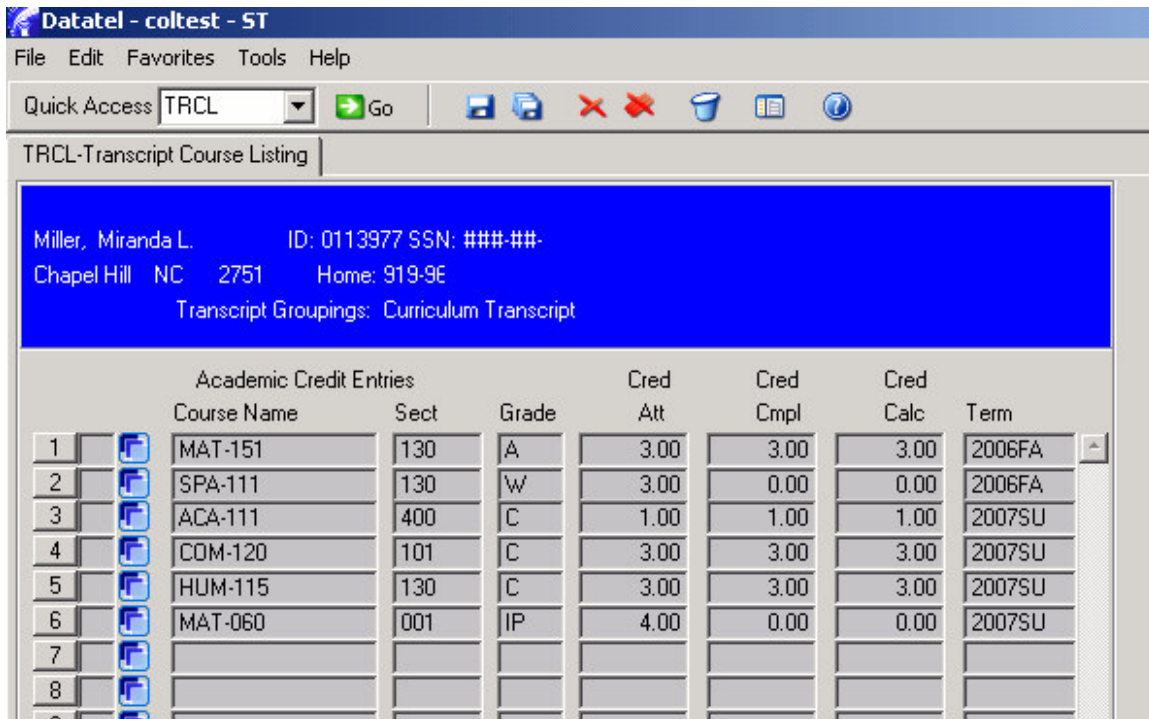
After you have selected and confirmed the student's record, a **Transcript Groupings Look Up** box will appear. If it is not already populated, in the Transcript Groupings Look Up box, type **CU** for Curriculum, and then click **OK**.

Step Four: Transcript Course Listing Overview

After you have selected CU and clicked OK, you will be brought the **Transcript Course Listing** screen (**TRCL**).

The **Transcript Course Listing** screen shows a curriculum transcript for the selected student including course and section number, grade, credits, and term. If nothing is listed on the screen, the student does not have transcripts from DTCC or on file from other schools

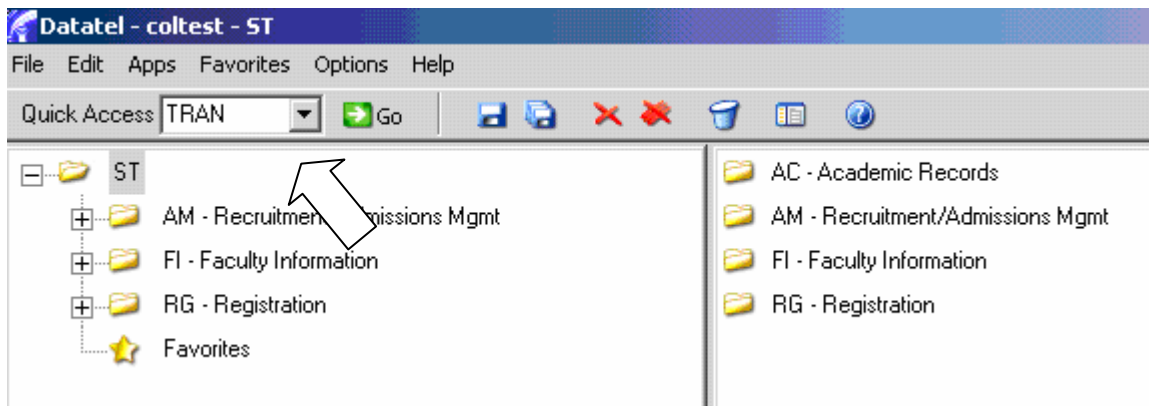
If a student needs an official copy of their transcripts, please refer the student to the Student Records Office, 1202 Wynn Student Services Center.



Step Four: Exit TRCL

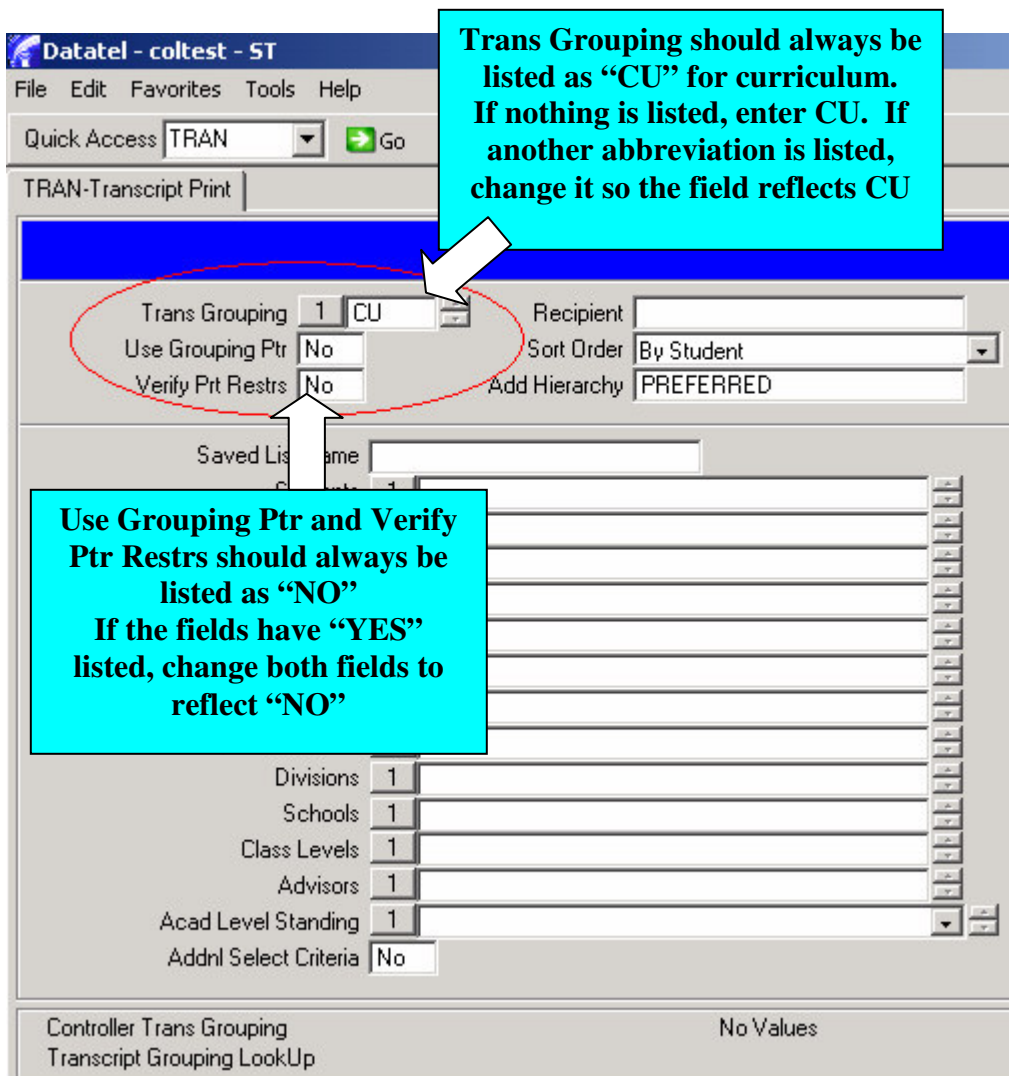
After you are finished with the **Transcript Course Listing** screen, you can select the **CANCEL ALL** icon on the **Tool Bar** to exit **TRCL** and return to the main menu.

Step One: Access TRAN Screen



To access the Transcript Print screen, type **TRAN** in the mnemonic box (located on the **Tool Bar**), and then click the **GO** button.

Step Two: TRAN Screen Setup



Trans Grouping should always be listed as "CU" for curriculum. If nothing is listed, enter CU. If another abbreviation is listed, change it so the field reflects CU

Use Grouping Ptr and Verify Ptr Restrs should always be listed as "NO" If the fields have "YES" listed, change both fields to reflect "NO"

Trans Grouping	1	CU
Use Grouping Ptr	No	
Verify Ptr Restrs	No	
Recipient		
Sort Order	By Student	
Add Hierarchy	PREFERRED	
Saved List Name		
Divisions	1	
Schools	1	
Class Levels	1	
Advisors	1	
Acad Level Standing	1	
Addnl Select Criteria	No	

Controller Trans Grouping
Transcript Grouping LookUp

No Values

Step Three: Select Student

Remember that using Colleague, you can select a student's record two ways:

- Last Name, First Name
- Student ID Number

Unlike other Colleague screens, a Student Look Up box will not appear. Line item “Students”, which is listed under Verify Prt Restrs, is where you will enter the student’s name or Colleague ID number.

Datatel - coltest - ST

File Edit Favorites Tools Help

Quick Access TRAN Go

TRAN-Transcript Print

Trans Grouping 1 CU Recipient

Use Grouping Ptr No Sort Order By Student

Verify Prt Restrs No Add Hierarchy PREFERRED

Saved List Name

Students 1 miller...

Acad Programs Incl 1

Acad Programs Excl 1

Academic Levels 1

Home Locations Incl 1

Home Locations Excl 1

Departments Incl 1

Departments Excl 1

Divisions 1

Schools 1

Class Levels 1

Advisors 1

Acad Level Standing 1

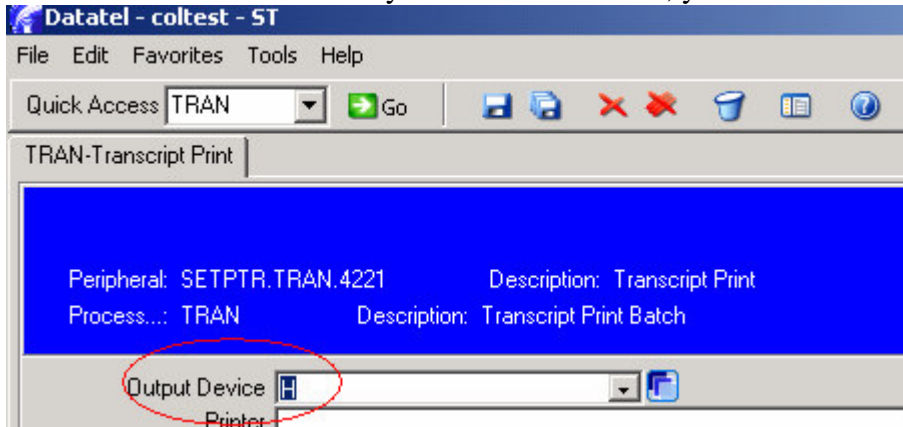
Addnl Select Criteria No

Controller Students Value 1/1

After you have selected your student, select the **SAVE ALL** (several floppy disks) icon on the **Tool Bar**.

Step Four: TRAN Screen Setup Continuation-H

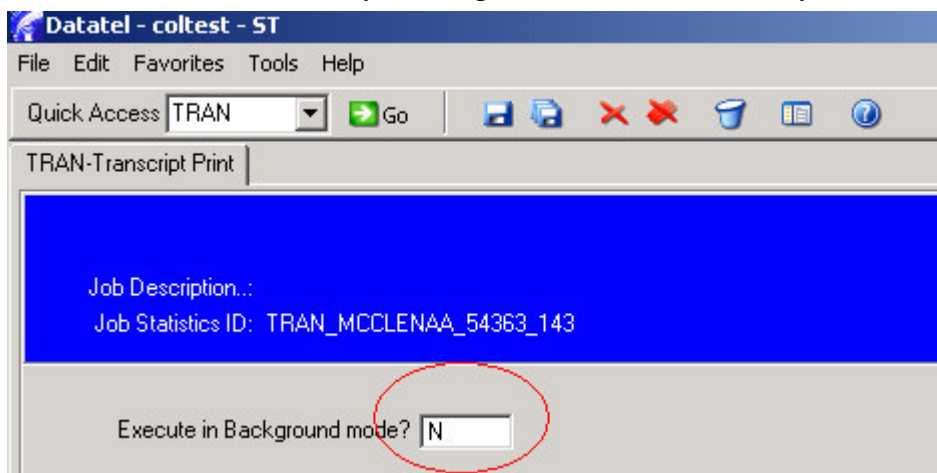
After you have confirmed and saved your student selection, you will arrive at this screen.



The only field you have to populate is line item “Output Device”. Make sure that this field has an “H” listed. After you have entered and confirmed H as the Output Device, select the **SAVE ALL** (several floppy disks) icon on the **Tool Bar**.

Step Five: TRAN Screen Setup Continuation-N

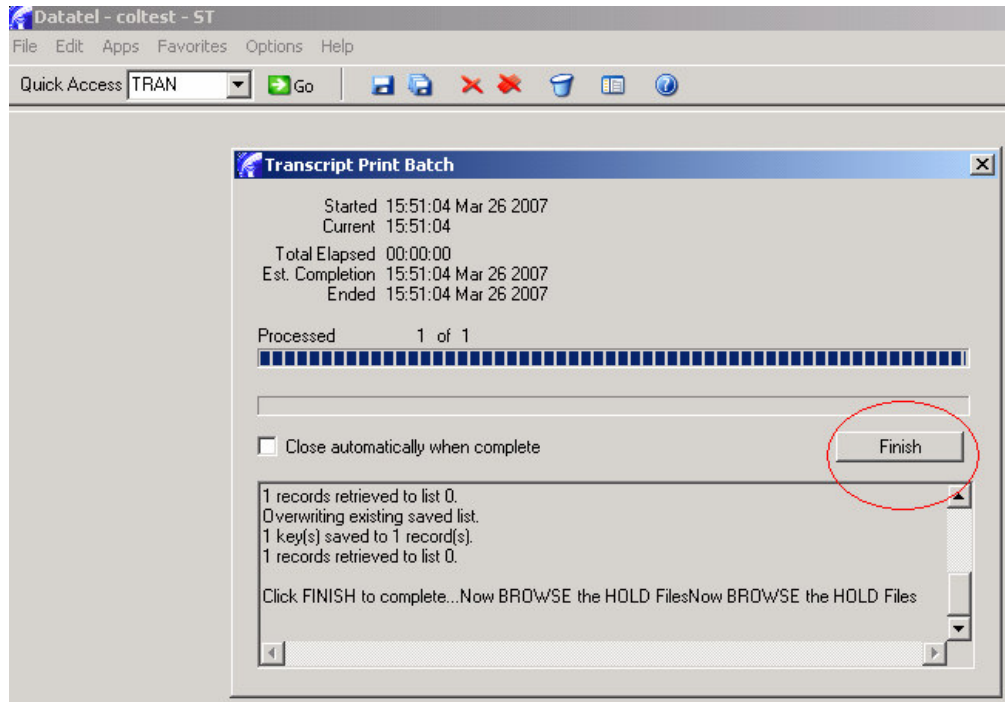
After you have confirmed and saved your Output Device selection (H) you will arrive at this screen.



The only field you have to populate is line item “Execute in Background mode?” Make sure that this field has an “N” for no listed. After you have entered and confirmed N as the answer to “Execute in Background mode”, select the **SAVE ALL** (several floppy disks) icon on the **Tool Bar**.

After you select **SAVE ALL**, Colleague will begin searching for the selected student’s transcript. This process may take a few moments. After Colleague completes the transcript search, click Finish.

Once you have input the initial transcript printing requirements, the screens should automatically default to the correct selections. If the student field is populated next time you use the TRAN option, highlight the name and select your Delete or Backspace key to clear the field.



Step Six: View Student Transcript

Report Browser

1/1

Date: March 26 2007
 Name: Miller, Miranda

Page: 1 of 1
 SSN: 38- 9- 8
 Birth Date: 0 2 19 0

Issued to:
 Miranda Miller
 5 Bypass
 Chapel Hill NC 2751

Curriculum:

Course	Title	Grd	Repeat	Hrs Att	Hrs Cmpl	Grade Points	Course Dates
Fall 2006							
MAT-151**	Statistics I	A		3.00	3.00	12.00	08/15/06-12/13/06
SPA-111**	Elementary Spanish I	W		3.00	0.00	0.00	08/15/06-12/13/06
Term Totals:				6.00	3.00	12.00	GPA = 4.000
Cumulative Totals:				6.00	3.00	12.00	GPA = 4.000
Spring 2007							
MED-121	Medical Terminology I						01/08/07-05/08/07
Term Totals:				0.00	0.00	0.00	GPA = 0.000
Cumulative Totals:				6.00	3.00	12.00	GPA = 4.000

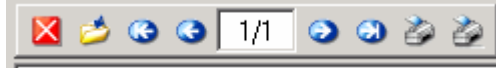
Associate in Arts
 Program Total: Completed Cred : = GPA =
 Note:
 The courses with a single asterisk are CAA courses.
 The courses with double asterisks are UNC Core Hour courses.

END OF TRANSCRIPT

The **TRAN** screen displays a list of transcripts for the selected student in the format that Student Records uses and lists:

*Course Name *Course Title *Grade *Credits *Term

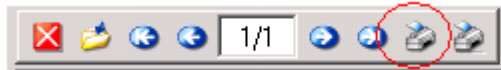
The transcript also lists the courses for the current semester the student is enrolled in although no grades are listed.



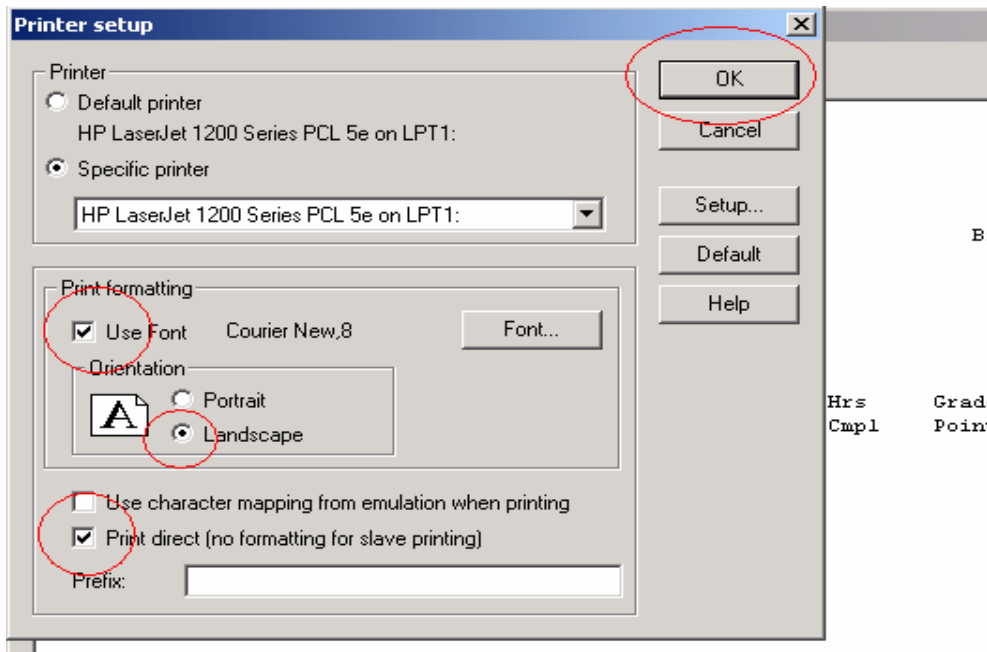
The TRAN tool bar in the upper left hand corner of the page provides you with navigation tools to view other transcript pages (using the arrows on either side of the page count window), as well as an exit student transcript option (red box with a white X icon on the left hand side of the tool bar) and printer icons on the right hand side of the tool bar to print an unofficial copy of the transcript.

Step Seven: Print Unofficial Student Transcript for Advising Purposes

In your office, to print an unofficial copy of the student transcript, select the first printer icon on the TRAN tool bar.



When the Printer setup box appears, make sure that your office printer is selected, that you select **Use Font**, **Landscape**, and **Print direct** before selecting the **OK** button. The transcript will then print to your desktop printer.



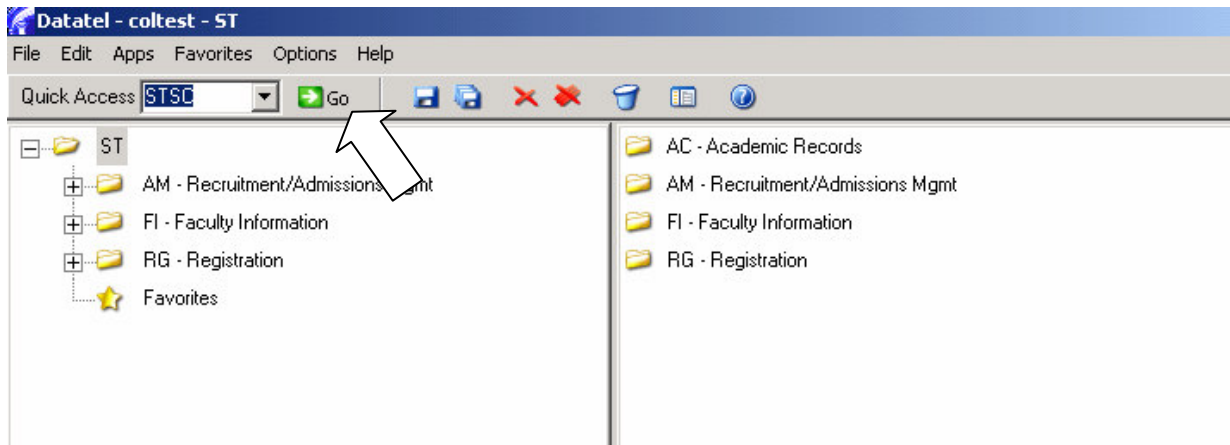
Step Eight: Exit TRAN

After you are finished viewing and/or printing the student's transcript, select the exit student transcript option (red box with a white X icon on the left hand side of the TRAN tool bar) to return to the main menu.

How to Access Student Schedule

Student schedules can be accessed through the Student Schedule section of Colleague. The Student Schedule mnemonic is **STSC**

Step One: Access STSC Screen

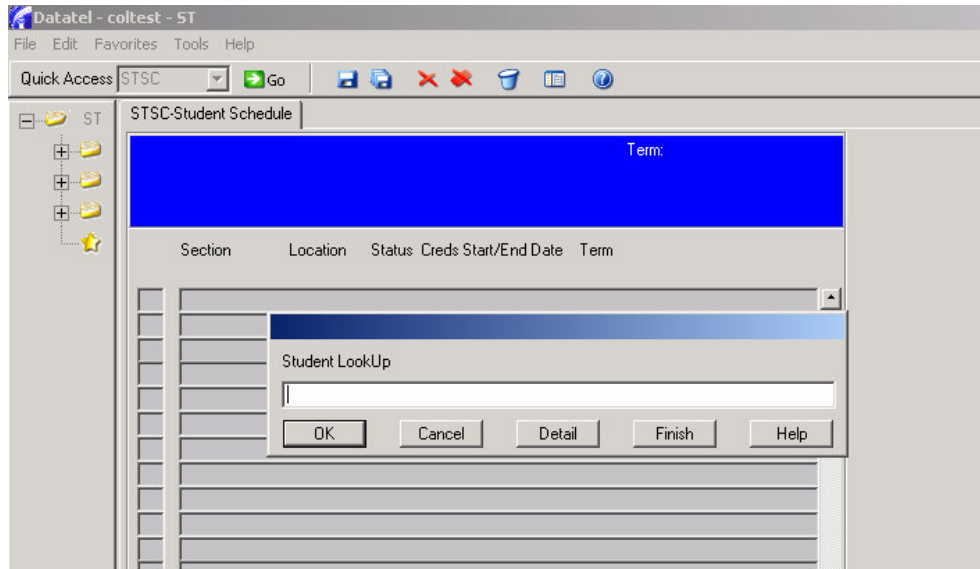


To access the Student Schedule screen, type **STSC** in the mnemonic box (located on the **Tool Bar**), and then click the **GO** button.

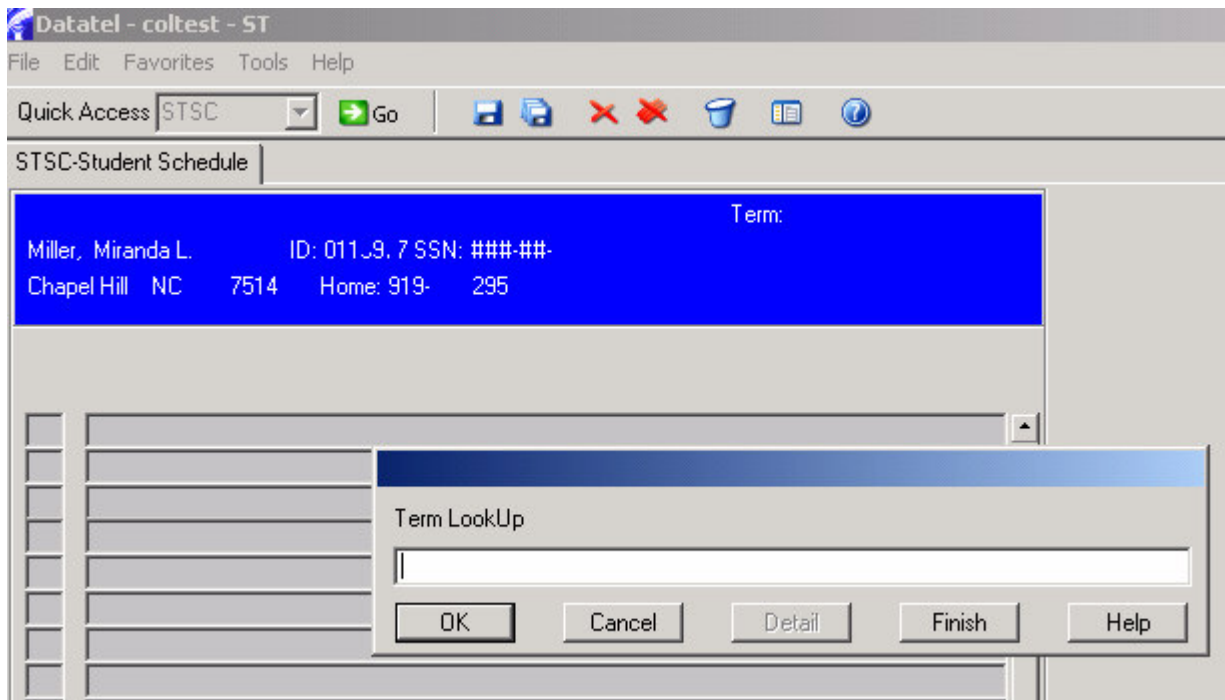
Step Two: Select Student Record (Student Look Up)

As with the Student Look Up section of the Colleague, you will need to select a student's record to access their schedule. Please refer back to pages 10-14 to review the student record selection process.

After you enter **STSC** in the mnemonics box and click **GO**, you will arrive at the **Student Look Up** screen.



Step Three: Select Term



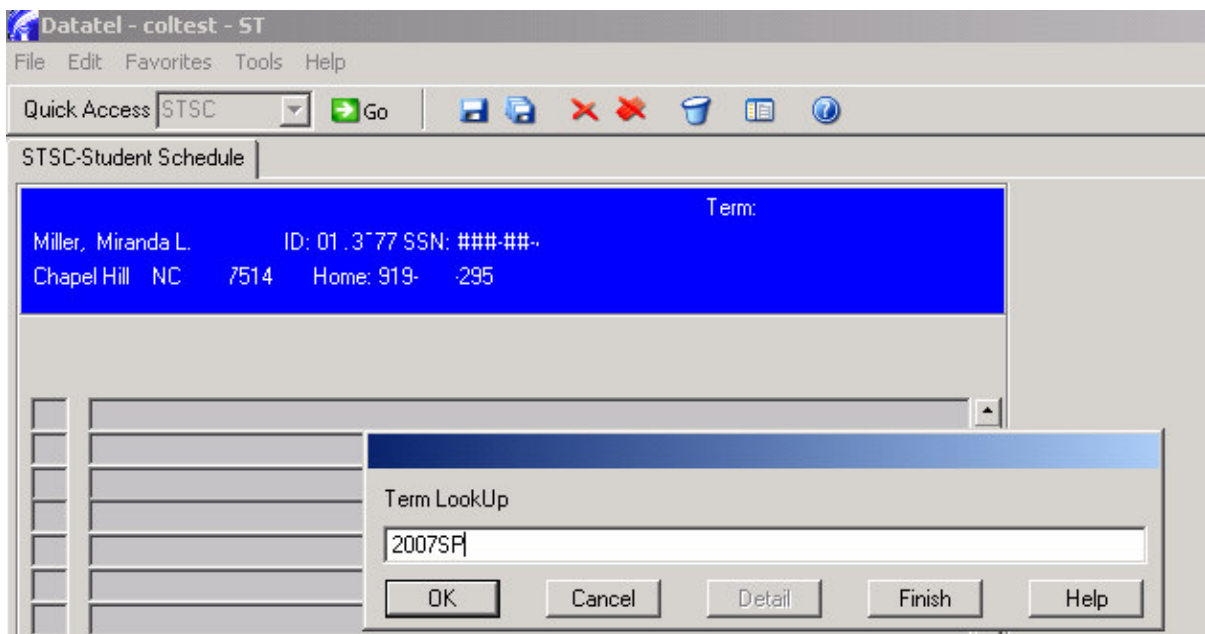
After you have selected your student, you will arrive at the Term Look Up screen. Here you will enter the term for the semester you would like to view the student's schedule.

The term is entered by year (ex. 2007) and first two letters of the semester (ex. SP for Spring). For example if you were looking up a student's schedule for the Spring 2007 semester, you would enter 2007SP. Once you have entered the term, click **OK**

SP=Spring

SU=Summer

FA=Fall



The screenshot shows the 'Datatel - coltest - ST' application window. The title bar includes 'File Edit Favorites Tools Help'. Below the title bar is a 'Quick Access' bar with 'STSC' selected and a 'Go' button. The main content area is titled 'STSC-Student Schedule' and displays student information for Miller, Miranda L. (ID: 01 397, SSN: ###-##, Chapel Hill NC 2751, Home: 919-9 -29) for the term 2007SU. Below this is a table of courses with callouts pointing to specific fields:

Course	Location	Credit Hours	Semester Dates	Term	Days & Times Course Meets
ACA-111-400	Main Campus	New 1.00	05/21/07 06/22/07	2007SU	COLL 239 CLAS T 03:00PM 04:20PM (F,V)
					OL ONLINE CLAS TBA TBA
COM-120-101	Main Campus	New 3.00	05/21/07 07/31/07	2007SU	PHIL 373 CLAS MW 01:05PM 03:05PM (F,V)
					HUM-115-130 Main Campus New 3.00 05/21/07 07/31/07 2007SU
					PHIL 309 CLAS TTH 10:30AM 12:30PM (F,V)
					MAT-060-001 Main Campus New 4.00 05/21/07 07/31/07 2007SU
					COLL 235 CLAS MTWTH 08:00AM 08:50AM (F,V)
					COLL 235 LAB MTWTH 08:55AM 09:40AM

After you have selected the Term to view for your student, you will be brought the **Student Schedule** screen (**STSC**).

The Student Schedule screen provides the student's schedule for the term you selected. If nothing is listed on the screen, the student did not take classes during the selected term** Past term schedules will not be available until the transcript conversion is completed. Use UNIX to look up previous term schedules**

If a student needs a copy of their current semester schedule, please refer the student to the Registration Office, 1203 Wynn Student Services Center.

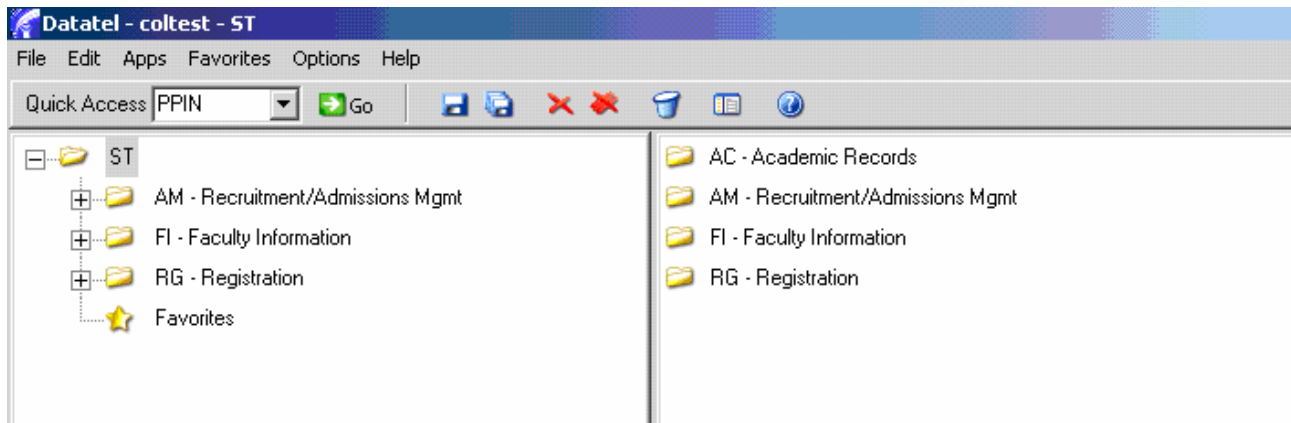
Step Four: Exit STSC

After you are finished with the **Student Schedule** screen, you can select the **CANCEL ALL** icon on the **Tool Bar** to exit **STSC** and return to the main menu.

How to Access and Create Student Personal Identification Numbers (PIN)

Student Personal Identification Numbers are created by advisors and then provided to students so they can register for the upcoming semester. Student Personal Identification Numbers (PINs) can be created and accessed through the Personal ID Numbers section of Colleague. The Student PIN mnemonic is **PPIN**

Step One: Access PPIN Screen

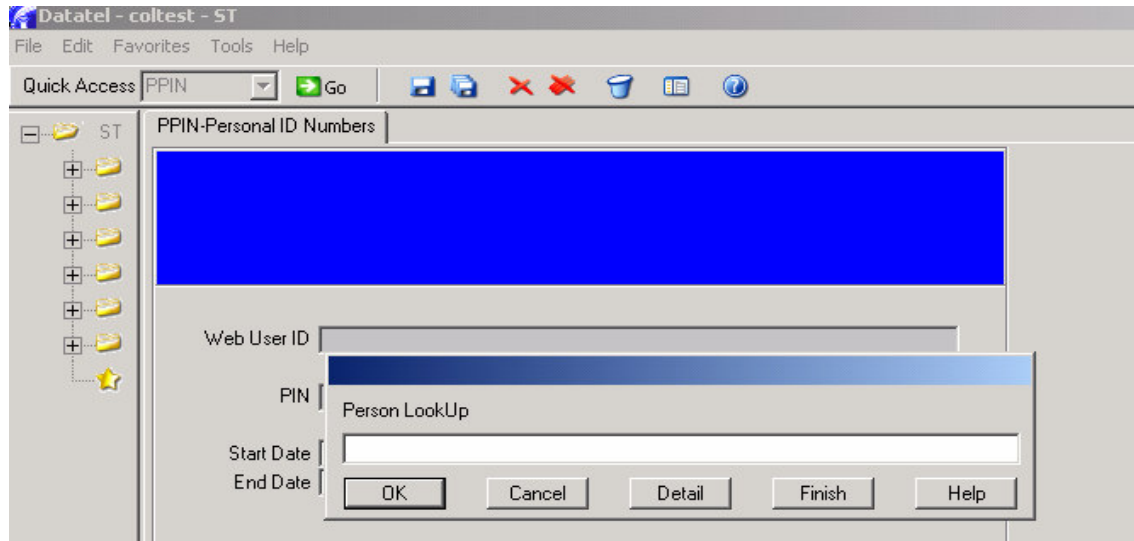


To access the Student PIN screen, type **PPIN** in the mnemonic box (located on the **Tool Bar**), and then click the **GO** button.

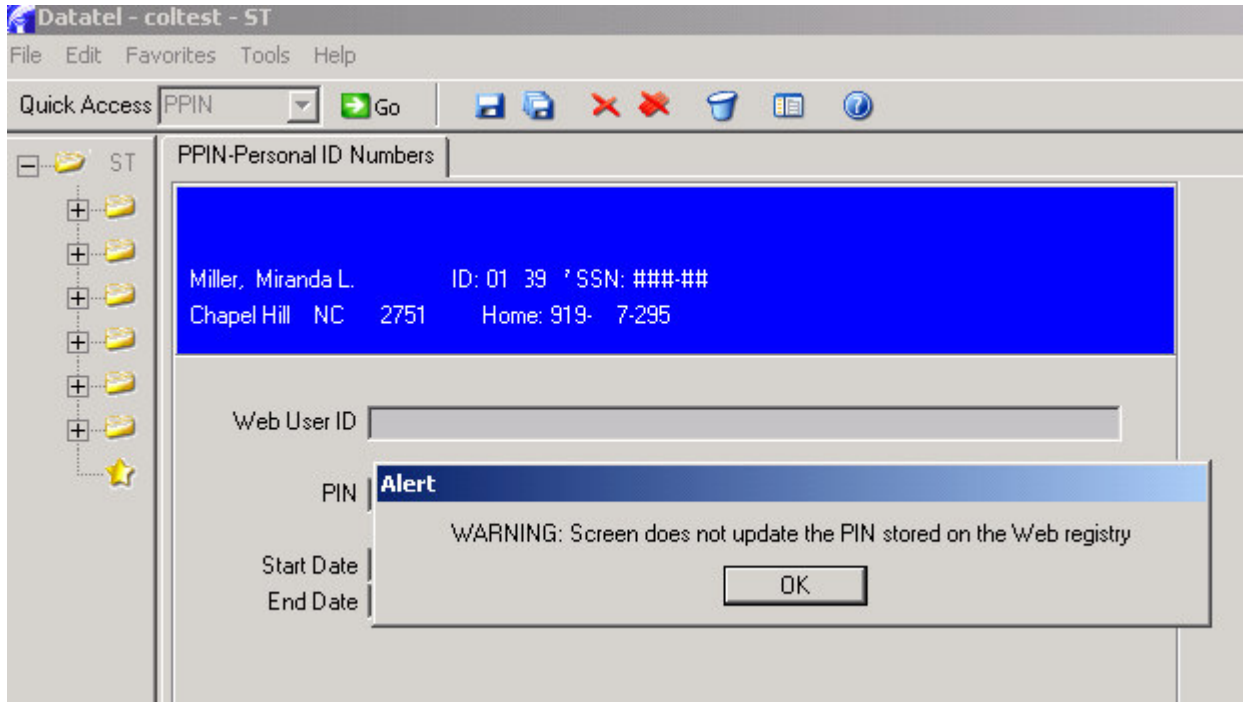
Step Two: Select Student Record (Person Look Up)

After you enter **PPIN** in the mnemonics box and click **GO**, you will arrive at the **Person Look Up** screen.

As with the Student Look Up section of the Colleague, you will need to select a student's record to access their test scores. Please refer back to pages 10-14 to review the student record selection process. The same methods of student record selection will also be used to access a student's test scores and schedule.

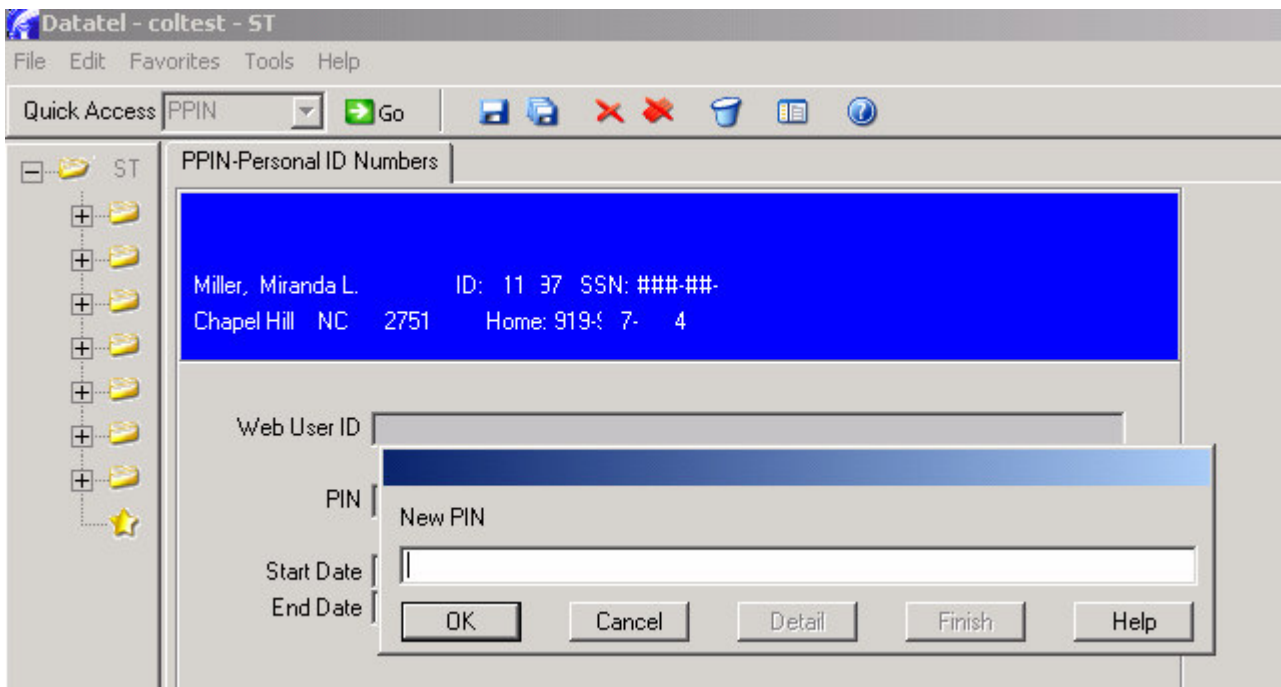


After you have selected a student's record, you will receive a warning message before the student's record appears. Click **OK** to access the student's record.

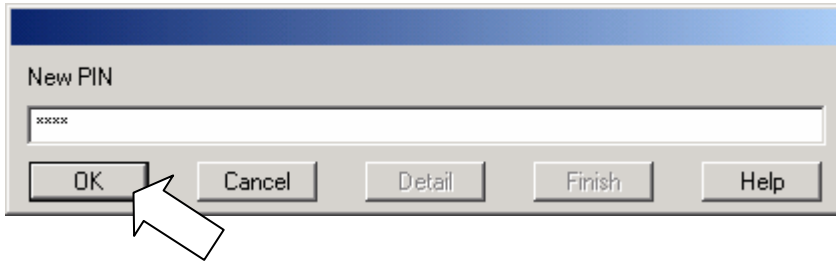


Step Three: Create Student PIN

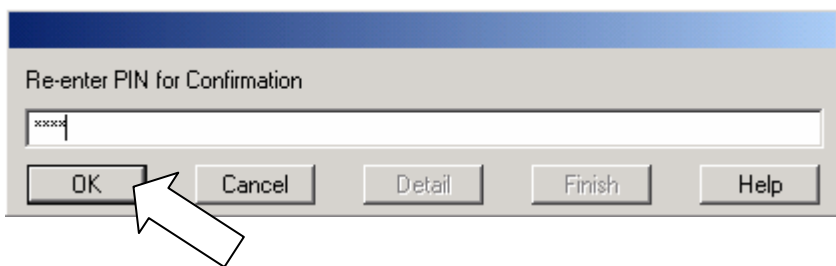
After you have selected a student record, you will arrive at the **New PIN** screen. The **New PIN** screen is where you will enter a four digit personal identification number for the student you have selected. The four digit PIN will be the student's birth year. For example, if the student was born on July 18, 1983 the PIN you will enter on the **New PIN** screen will be 1983



As you type the PIN in the New PIN box, you will only see asterisks. When you are finished typing in the four digit PIN, click **OK**.



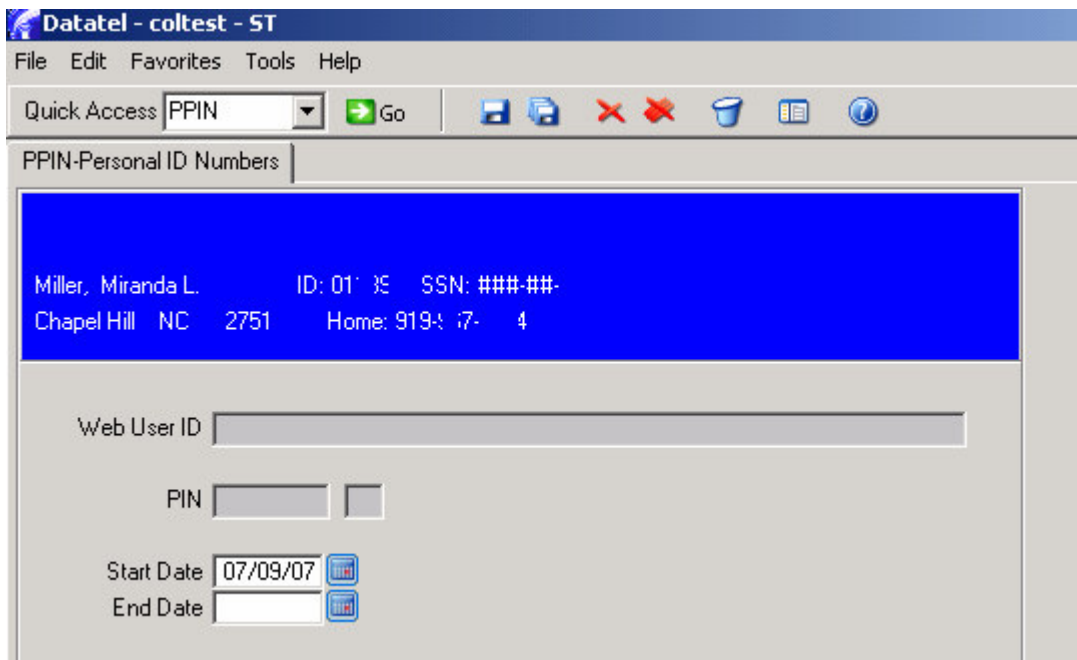
You will be asked to reenter the PIN for confirmation. Type the PIN again in the box and click **OK**.



The student PIN you create will not be visible on any Colleague screens. If the “New PIN” and “Re-enter PIN for Confirmation” screens do not match, you will begin again with the “New PIN” screen.

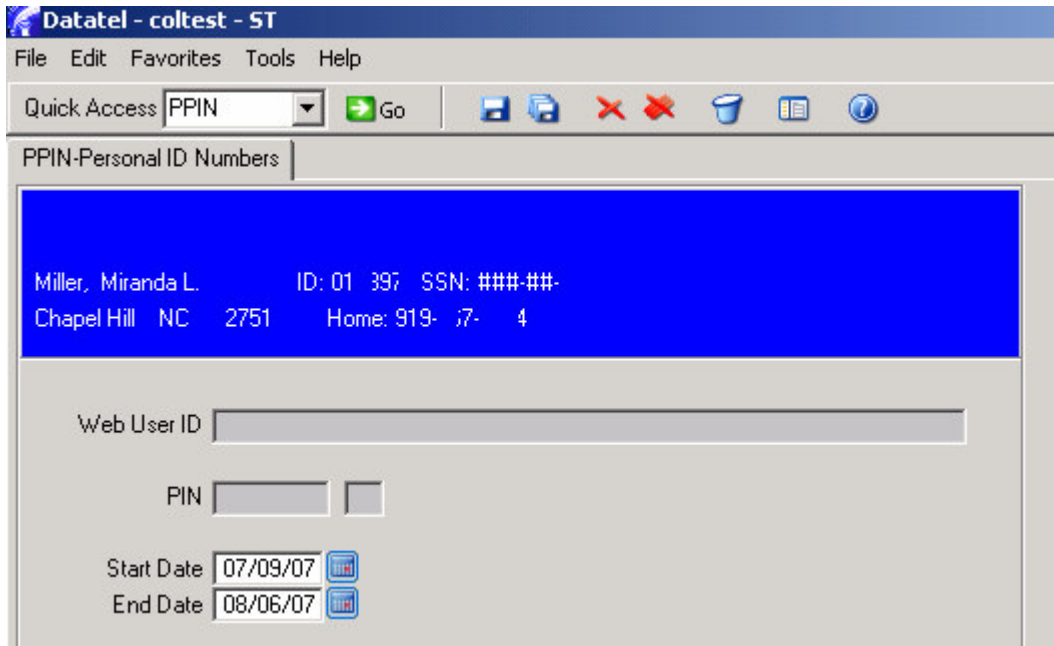
Step Four: Set PIN Activation Dates

After you have created and confirmed the four digit PIN for your student, you will need to set the PIN activation dates.



The **Start Date** will automatically default to today's date. **You must set the Start Date as the first day that student's can register.** Be sure to check the registration dates every semester since the first date of registration must be listed correctly in the **Start Date** field.

The **End Date** needs to be populated with the last date that students will be able to register. Be sure to check the registration dates every semester since the last date of registration must be listed correctly in the **End Date** field.



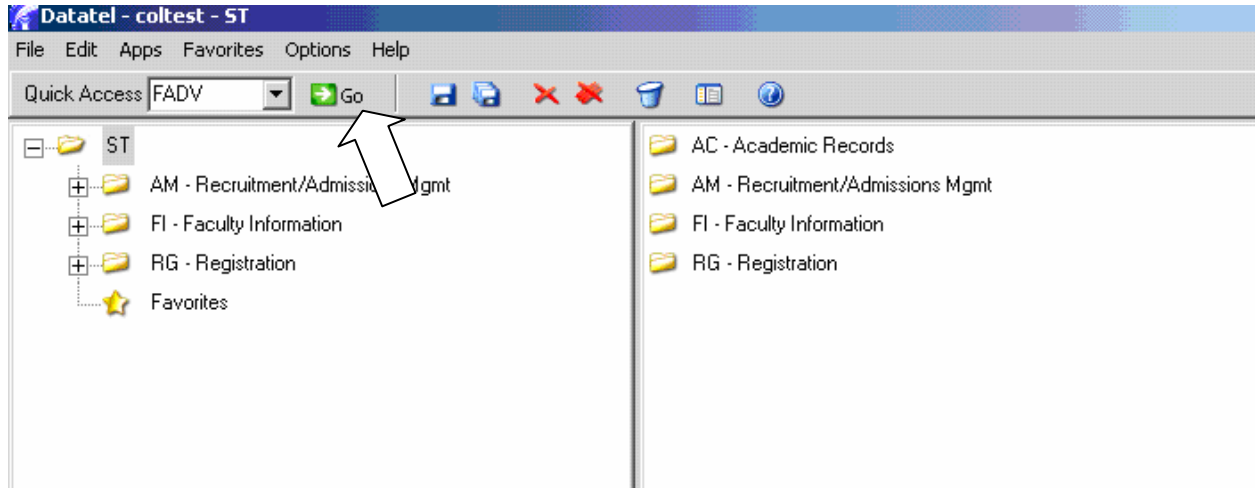
The screenshot shows a web browser window titled "Datatel - coltest - ST". The address bar contains "PPIN" and a "Go" button. The page content includes a blue header with the following text: "Miller, Miranda L. ID: 01 397 SSN: ###-##-#### Chapel Hill NC 2751 Home: 919- 7- 4". Below this is a "Web User ID" input field, a "PIN" input field, and two date pickers: "Start Date" set to "07/09/07" and "End Date" set to "08/06/07". The tool bar contains icons for "Save", "Print", "Close", "Refresh", "Home", and "Help".

After the **Start Date** and **End Date** have been entered, the student's record will need to be saved and updated. To save the changes made in the student record click the **SAVE ALL** icon (several floppy disks icon to the right of the GO button, located on the **Tool Bar**). After you click the **SAVE ALL** icon, you will return to the main menu.

How to Access Your Assigned Advisee Listing

Assigned Advisee Listings can be accessed through two different screens in Colleague, one that allows you view your assigned advisee listing (**Faculty Advisees**) and one that allows you to view and print your assigned advisee listing (**Advisees by Advisor Report**). The Assigned Advisee Listing mnemonics are **FADV** and **XAAR**.

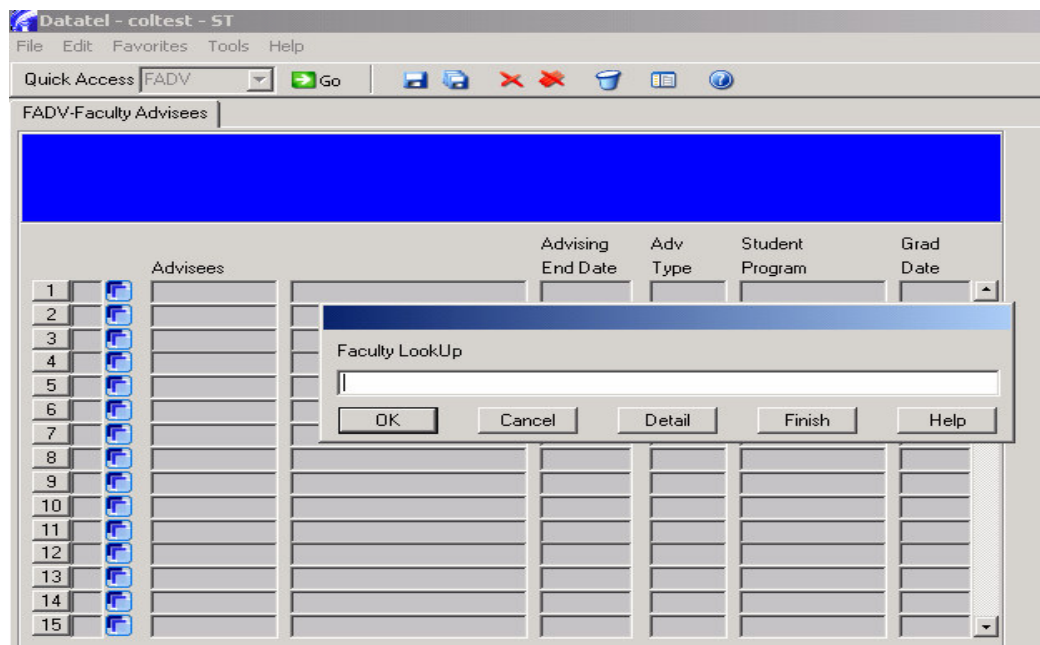
Step One: Access FADV Screen



To access the Faculty Advisees screen, type **FADV** in the mnemonic box (located on the **Tool Bar**), and then click the **GO** button.

Step Two: Enter Your Name (Faculty Look Up)

After you enter **FADV** in the mnemonics box and click **GO**, you will arrive at the **Faculty Look Up Screen**. With Colleague you will not need an advisor code to access your assigned advisee listing as you did with UNIX. Similar to the Student Look Up, you will need to enter **your name** in the **Faculty Look Up** to pull up your list of assigned advisees.



Step Three: View Faculty Advisees Listing

Advisor Name

Advisee's Colleague ID #

Advisee's Name

PROG should be listed for all advisees, it means they are Program Student.

Student Program lists the Program of Study code for the certificate, diploma, or degree the student is admitted to

Advisees	Advising End Date	Adv Type	Student Program	Date
1	00/15/00	PROG	A10100	
2	00/15/00	PROG	A10100	
3	00/15/00	PROG	A10100	
4	00/15/00	PROG	A10100	
5				
6				
7				
8				
9				
10				

Step Four: Exit FADV

After you are finished with the **Faculty Advisees** screen, you can select the **CANCEL ALL** icon on the **Tool Bar** to exit the **Faculty Advisees** section and return to the main menu.

Advisee Listing View & Print Option

Step One: Access XAAR Screen

Go

- ST
 - AM - Recruitment/Admissions Mgmt
 - CC - Communications Management
 - CU - Curriculum Management
 - DM - Person Demographics
 - FO - Forms Processing
 - FI - Faculty Information
 - RS - Registration
- AC - Academic Records
- AM - Recruitment/Admissions Mgmt
- CC - Communications Management
- CU - Curriculum Management
- DM - Person Demographics
- FO - Forms Processing
- FI - Faculty Information
- RS - Registration

To access the **Advisees by Advisor** report, type **XAAR** in the mnemonic box (located on the **Tool Bar**), and then click the **GO** button.

Step Two: XAAR Screen Setup

After you enter **XAAR** in the mnemonics box and click **GO**, you will arrive at the **Advisees by Advisor Report** screen. At the top of the page the Print SSN field should have **No** listed. In the middle of the page there is an **Advisors** field. You will need to enter **your name** (or Colleague ID number) in the **Advisors** field to select your list of assigned advisees.

Datatel - coltest - ST

File Edit Favorites Tools Help

Quick Access XAAR Go

XAAR-Advisees by Advisor Report

Print SSN No (The default printed is the Student ID)

Saved List Name

Advising Dates Begin End

Terms 1 2

Advisors 1 0081246 T. Jaynes 2

Students 1 2

Acad Programs 1 2

Additional Selection Criteria No

Once No is listed in the Print SSN field and your name is listed in the **Advisors** field, select the **SAVE ALL** (several floppy disks) icon on the **Tool Bar**.

Step Three: XAAR Screen Setup Continued-H

After you have confirmed and saved your advisor selection, you will arrive at this screen.

Datatel - coltest - ST

File Edit Favorites Tools Help

Quick Access XAAR Go

XAAR-Advisees by Advisor Report XAAR-Advisees by Advisor Report

Peripheral: SETPTR.MCCLENAA.387 Description:

Process...: XAAR Description:

Output Device H Printer

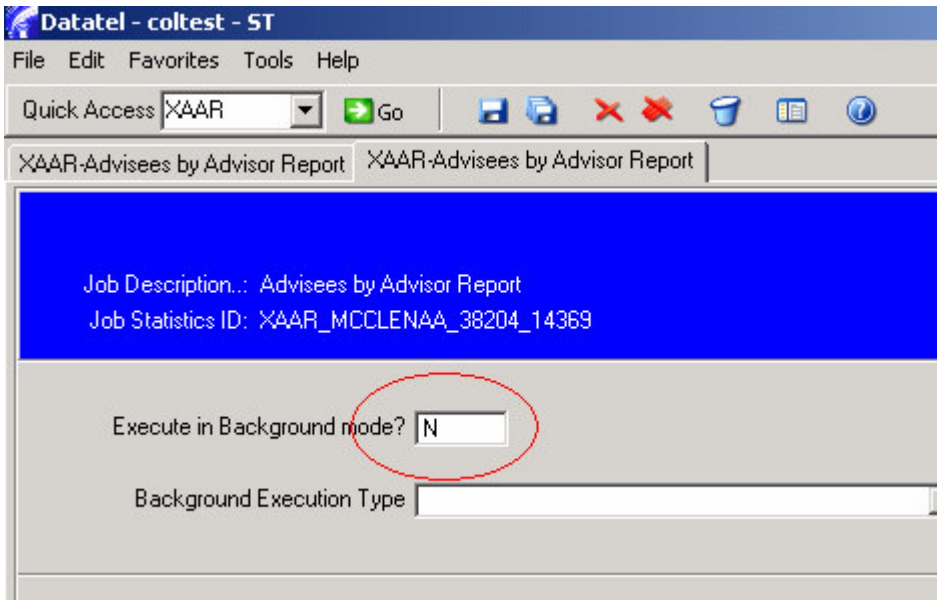
Form Name

Banner

The only field you have to populate is line item “Output Device”. Make sure that this field has an “H” listed. After you have entered and confirmed H as the Output Device, select the **SAVE ALL** (several floppy disks) icon on the **Tool Bar**.

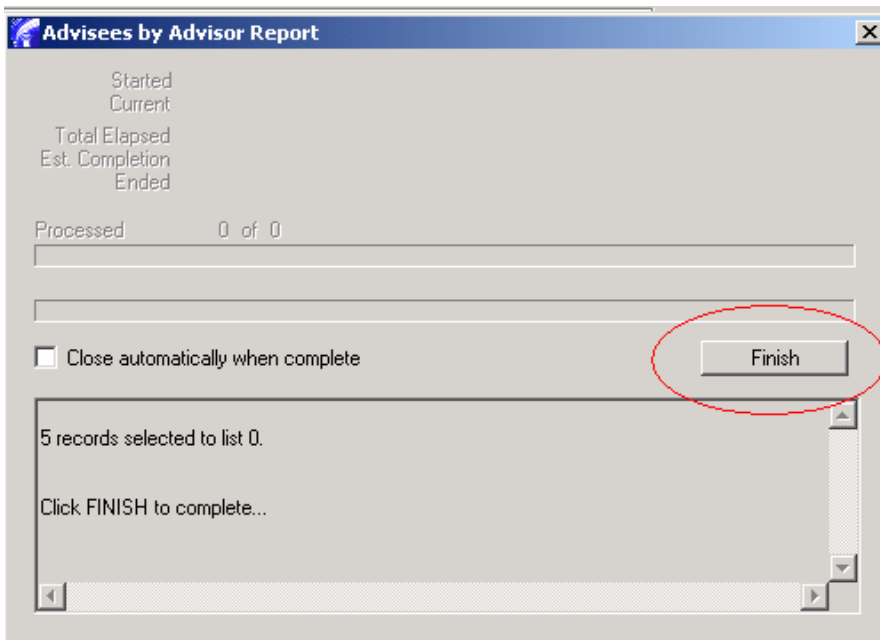
Step Four: XAAR Screen Setup Continuation-N

After you have confirmed and saved your Output Device selection (H) you will arrive at this screen.



The only field you have to populate is line item “Execute in Background mode?” Make sure that this field has an “N” for no listed. After you have entered and confirmed N as the answer to “Execute in Background mode”, select the **SAVE ALL** (several floppy disks) icon on the **Tool Bar**.

After you select **SAVE ALL**, Colleague will begin searching for the selected advisors assigned advisees. This process may take a few moments. After Colleague completes the advisee search, click Finish.



Step Five: View Assigned Advisee Listing

May 04 2007
10:54

Durham Technical Community College
Advisees by Advisor Reports

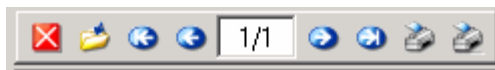
Page: 1

Advisor Name: Jaynes,

SSN/ID	Student Name	Home Phone	Acad Programs	Cum Cr Hrs Cmpl	Cur Term Cr Hrs	Cur Term Cont Hrs	Last Term
0081298	Augustine, Penelope		A25120	4.00	3.00	4.00	2006FA
0163688	Curry, Octavia	919-699-5200	A25120 A25120	6.00	3.00	4.00	2007SU
0169593	Troll, Irwin	919-555-1212	A25120	5.00	8.00	11.00	2007SU
0085447	Washington, Harry	919-456-7890		5.00	1.00	1.00	2007SU

The **XAAR** screen displays a list of your assigned advisees and lists:

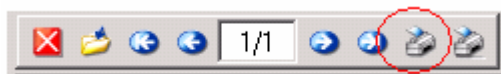
*Advisee Name *Colleague ID Number *Phone Number *Academic Program
*Credit Hours Completed *Last Term Attended



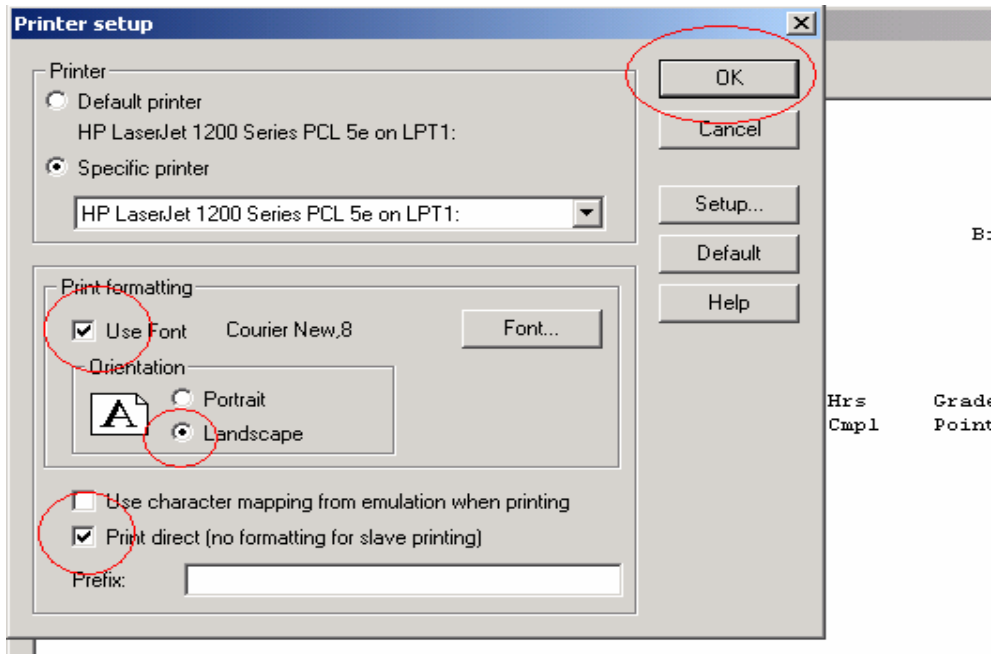
The XAAR tool bar in the upper left hand corner of the page provides you with navigation tools to view other advisee listing pages (using the arrows on either side of the page count window), as well as an exit advisee listing option (red box with a white X icon on the left hand side of the tool bar) and printer icons on the right hand side of the tool bar to print a copy of your advisee listing.

Step Six: Print Your Assigned Advisee Listing

In your office, to print copy of your assigned advisee listing, select the first printer icon on the XAAR tool bar.



When the Printer setup box appears, make sure that your office printer is selected, that you select **Use Font, Landscape** (you can use Portrait if that is your preference), and **Print direct** before selecting the **OK** button. The transcript will then print to your desktop printer.



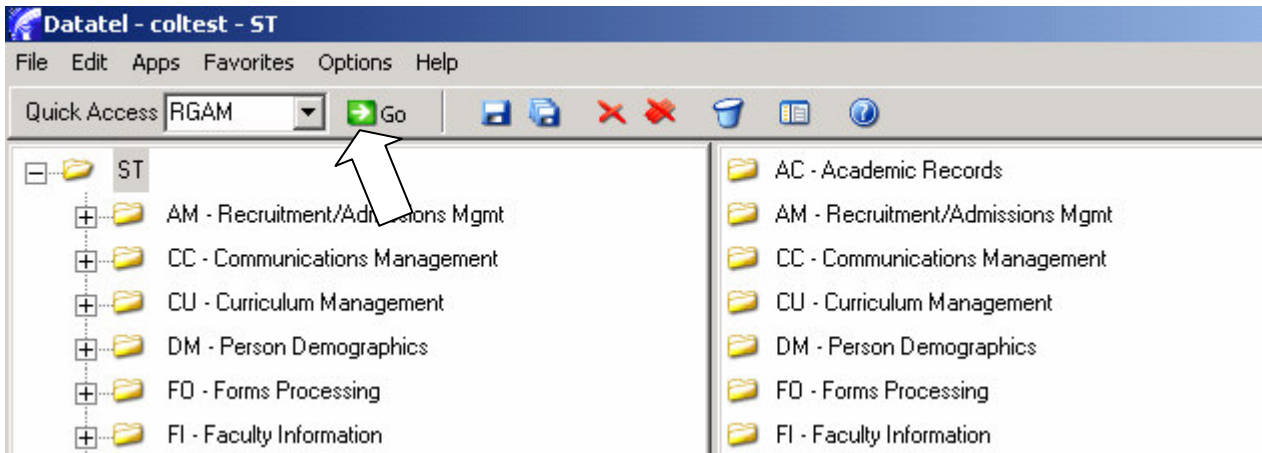
Step Eight: Exit XAAR

After you are finished viewing and/or printing your assigned advisee listing, select the exit assigned advisee listing option (red box with a white X icon on the left hand side of the XAAR tool bar) to return to the main menu.

How to Access Course Status & Seat Availability

The course status (opened or closed) and seat availability (total number of seat availability for the course and remaining open seats) are found in the **Registration Activity Monitor** section of Colleague. The mnemonic for the Registration Activity Monitor is **RGAM**.

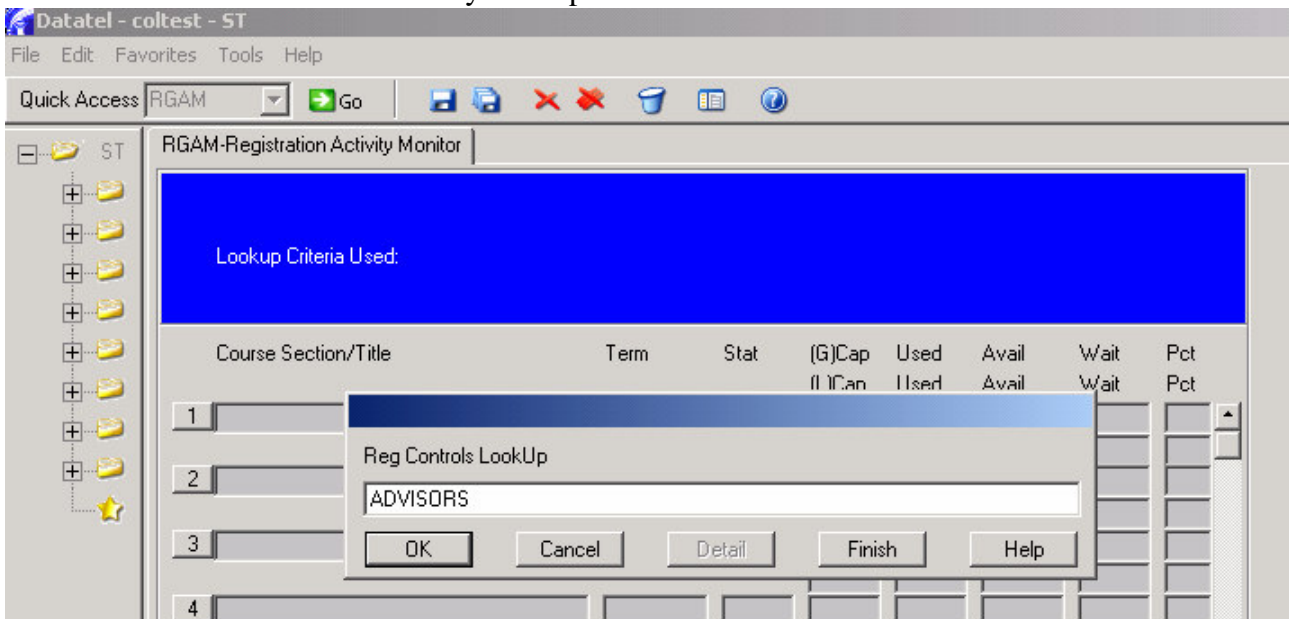
Step One: Access RGAM Screen



To access the Faculty Advisees screen, type **RGAM** in the mnemonic box (located on the **Tool Bar**), and then click the **GO** button.

Step Two: Enter Reg Controls Look Up

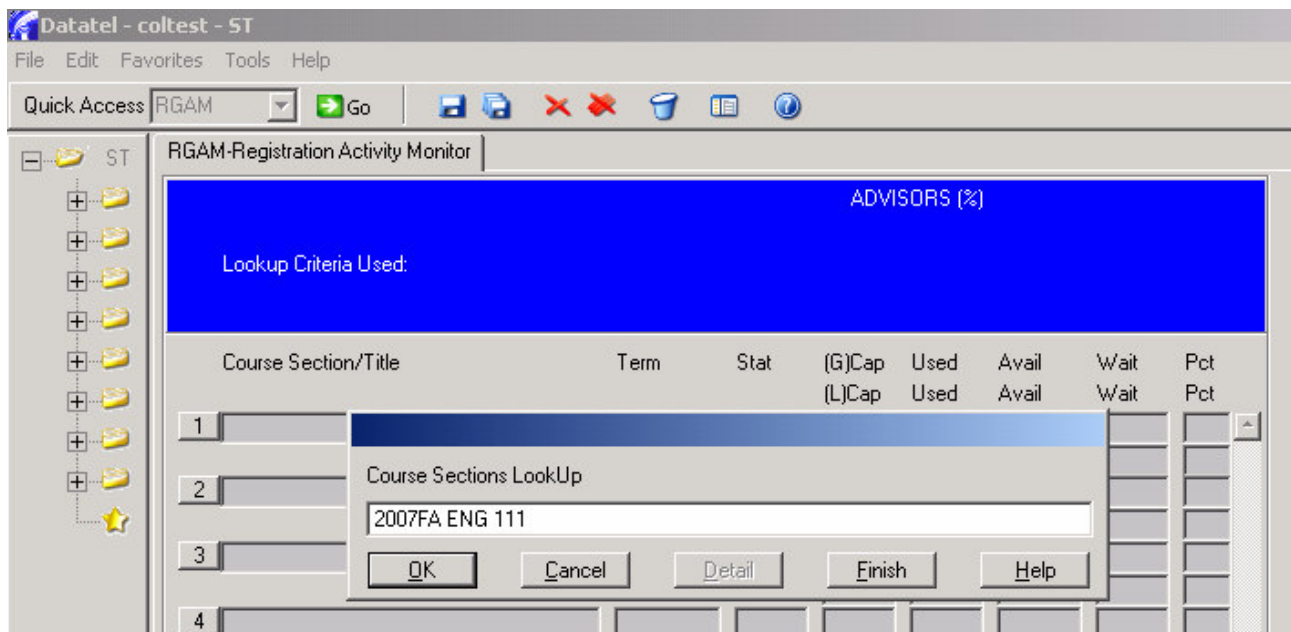
After you enter **RGAM** in the mnemonics box and click **GO**, you will arrive at the **Reg Control Look Up Screen**. You will need to enter **ADVISORS** in the **Reg Controls Look Up box** to access the course status and seat availability for a specific course.



Step Three: Enter Course Section Look Up

After you enter **ADVISORS** in the Reg Controls Look Up box and select OK, you will arrive at the **Course Section Look Up Screen**. You will need to enter year, semester, course prefix, and course number **Controls Look Up box** to access the course status and seat availability for a specific course.

Similar to student schedule, you will need to enter the **year** (ex. 2007), **semester** (ex. FA for Fall), the **course prefix** (ex. ENG), the **course number** (ex. 111) and the **course section number** (ex. 101) to view a specific course status and seat availability. You can also just enter all the search criteria except for the section number to see all sections of a specific class (ENG 111). After you have entered in your search information, select OK.



Step Four: View Course Status and Seat Availability

The screenshot shows the Registration Activity Monitor (RGAM) interface. The window title is "Datatel - coltest - ST". The menu bar includes "File", "Edit", "Favorites", "Tools", and "Help". The address bar shows "ess RGAM" and a "Go" button. Below the menu bar, there are several icons for file operations. The main content area is titled "ADVISORS (0%)" and displays a table of course sections. The table has columns for "Course Section/Title", "Term", "Stat", "(G)Cap", "Used", "Avail", "(L)Cap", and "Used Avail". The first row is circled in red, and a callout box points to it. Other callout boxes point to specific cells in the table, such as the "Term" column for row 4, the "Used" column for row 2, and the "Avail" column for row 2. A scroll bar is also circled in red, with a callout box pointing to it.

Course Section/Title	Term	Stat	(G)Cap	Used	Avail	(L)Cap	Used	Avail
1 ENG-111-101/Expository Writing	2007FA	Open	15	0	15	15	0	0
2 ENG-111-102/Expository Writing	2007FA	Open	25	2	23	15	0	0
3 ENG-111-103/Expository Writing	2007FA	Open	15	0	15	15	0	0
4 ENG-111-104/Expository Writing	2007FA	Open	15	0	15	15	0	0
5 ENG-111-105/Expository Writing	2007FA	Open	15	0	15	15	0	0
6 ENG-111-106/Expository Writing	2007FA	Open	15	0	15	15	0	0
7 ENG-111-107/Expository Writing	2007FA	Open	15	0	15	15	0	0

Callout boxes and their descriptions:

- Course Prefix, Number, Section Number, and Title
- Number of Remaining Seats available in the class
- Number of Seats already registered for
- Total Number of Seats available for the class
- Term and Course Status (Open or Closed)
- Use Scroll Bar to see additional sections

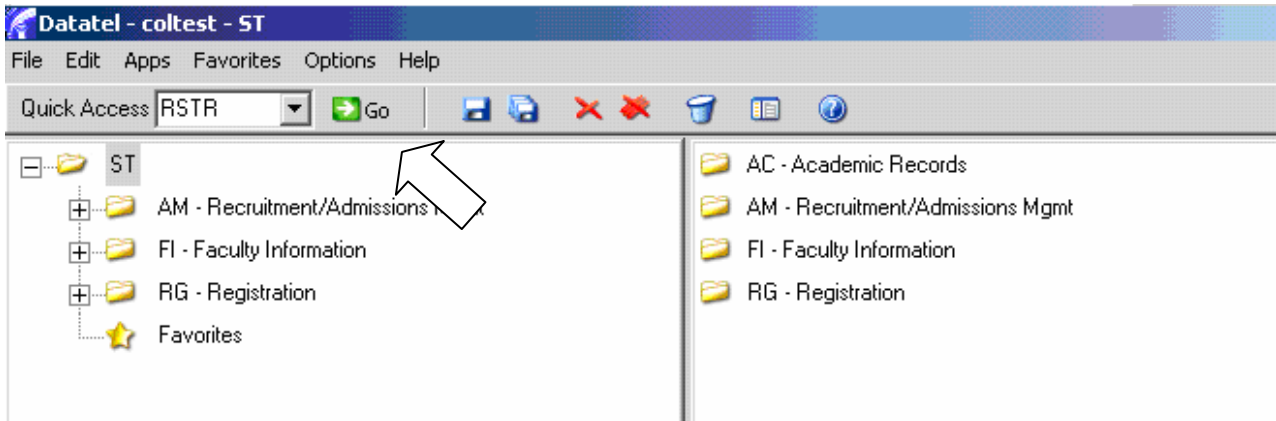
Step Five: Exit RGAM

After you are finished with the **Registration Activity Monitor** screen, you can select the **CANCEL ALL** icon on the **Tool Bar** to exit the **Registration Activity Monitor** section and return to the main menu.

How to Access a Course Roster

Course rosters are located in the **Academic Roster Inquiry** section of Colleague. The course roster mnemonic is **RSTR**.

Step One: Access RSTR Screen

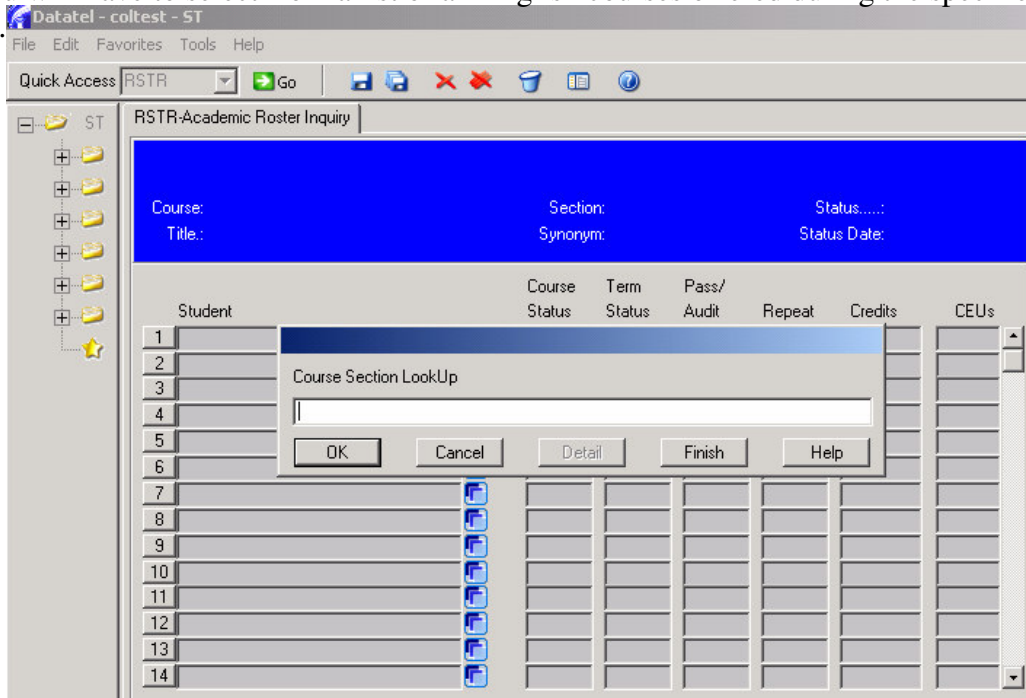


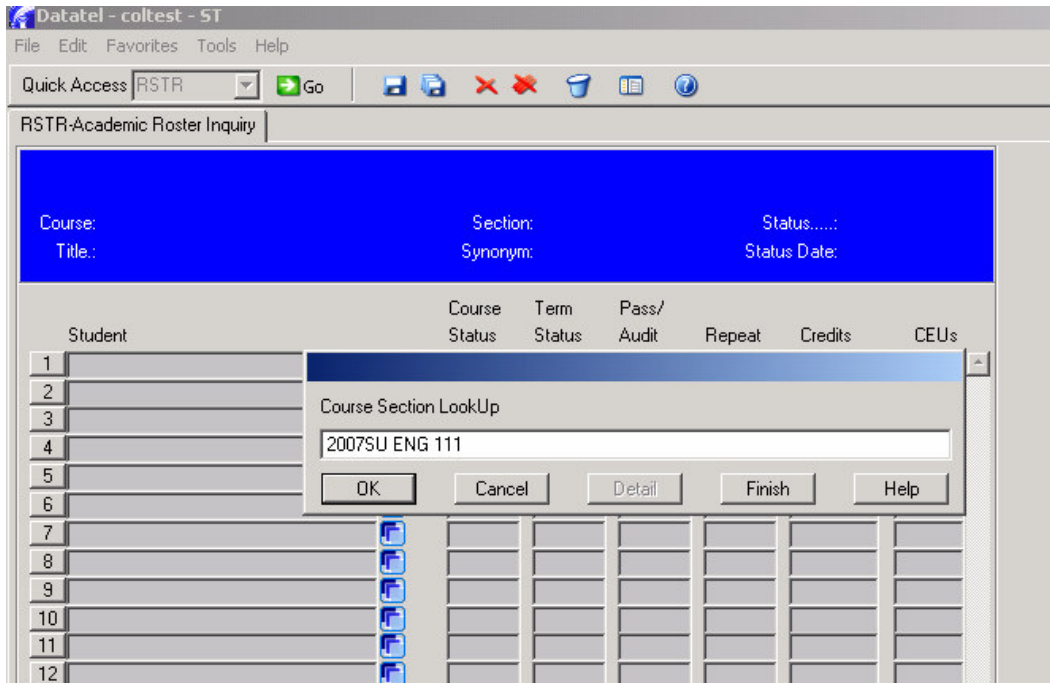
To access the Academic Roster Inquiry screen, type **RSTR** in the mnemonic box (located on the **Tool Bar**), and then click the **GO** button.

Step Two: Course Section Look Up

After you enter **RSTR** in the mnemonics box and click **GO**, you will arrive at the **Course Section Look Up** screen.

Similar to student schedule, you will need to enter the **year** (ex. 2007), **semester** (ex. SU for Summer), the **course prefix** (ex. ENG), then **course number** (ex. 111), and the **course section number** (ex. 101). If you only enter the year and semester, and the course prefix, (ex. 2007SU ENG) you will have to select from a list of all English courses offered during the specified semester.





After you enter in your course selection criteria, click **OK**

Just as you did when selecting a student's record (SPRO), you will have to select and confirm the class roster you are interested in viewing.

Option # 1-Point & Click

First you can **left click** the white box to the left of the student's name. A **check mark** will appear confirming that this is the record that you have selected. After you have made your selection, you will need to **SAVE** your selection. Click the **SAVE** icon on the **Tool Bar** or there is a second **SAVE** icon at the bottom right hand corner of the screen. After clicking **SAVE**, you will be directly linked to the student's record.

Option # 2-KeyBoard

You can also select and confirm the student's record by entering the line item number before the student's name in the white box at the bottom of the page. After you have entered the line item number, select the **Enter** key and you will be directly linked to the student's record.

The selection process also allows you to view the names of the instructors teaching the course.

Datatel - coltest - ST
 File Edit Favorites Tools Help

Quick Access RSTR Go

RSTR-Academic Roster Inquiry RSTR-Academic Roster Inquiry

Course Sections Resolution
 using COURSE.SECTIONS, View: COURSE.SECTIONS

Seq	Course	Sect	Term	Course Title	Location
19	ENG 111	134	2006FA	Expository Writing	Main Campus
				Active	08/15/06
				08/15/06 12/13/06 PHIL 357	CLAS MW 07:30PM 08:45PM
<input checked="" type="checkbox"/>	20	ENG 111	170	2006FA Expository Writing	Main Campus
				K. Cantwell Active	08/15/06
				08/15/06 12/13/06 PHIL 352	CLAS S 08:00AM 10:50AM
<input type="checkbox"/>	21	ENG 111	171	2006FA Expository Writing	Main Campus
				Active	08/15/06
				08/15/06 12/13/06 PHIL 357	CLAS S 11:00AM 01:50PM

Controller LookUp Resolution
 Seq Number, (F)lag, (S)ort/Select: 20

Save Icon

Instructor's Name

Checkmark

Line Item Number

Save Icon

Step Three: View Course Roster

Datatel - coltest - ST
 File Edit Favorites Tools Help

Quick Access RSTR Go

RSTR-Academic Roster Inquiry

Course: ACA 111 Section: 400 Status: Active
 Title: College Student Success Synonym: 0977 Status Date: 01/31/07

Student	Course Status	Term Status	Pass/Audit	Repeat	Credits	CEUs
1 0084591 Allen, Danyece S.	N	T			1.00	
2 0163688 Curry, Octavia L.	N	T			1.00	
3 0154836 Harden-Smith, Stephani	N	T			1.00	
4 0169768 Jenkins, Mary	N	T			1.00	
5 0081477 Jones, Patricia C.	N	P			1.00	
6 0169759 Manning, Donna K.	N	T			1.00	
7 0169557 Militello, Dylan A.	N	T			1.00	
8 0113977 Miller, Miranda L.	N	T			1.00	
9 0169726 Millhollin, Michael G.	N	T			1.00	
10 0169734 Mills, Allen P.	N	T	A		1.00	
11 0169302 Paggioli, Lorry R.	N	T			1.00	
12 0169762 Sanders, Samantha J.	N	T			1.00	
13 0169593 Troll, Irwin	N	P			1.00	
14 0085447 Washington, Harry D.	N	T			1.00	

The **RSTR** screen displays a list of all students enrolled in the selected course section with their Colleague IDs and information about:

- Course Status
- Term Status
- Whether the student is taking the course pass/fail or audit
- Whether the student is repeating the course
- How many credits or CEUs the student will earn upon completing the course

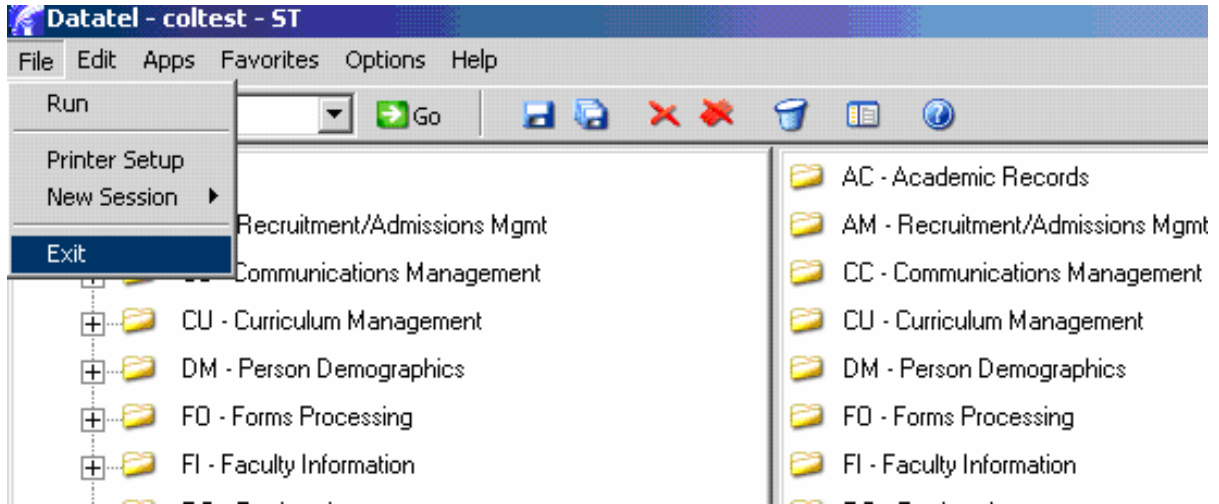
****Note**** Only one Colleague user can access a roster at a time.

Step Four: Exit RSTR

After you are finished with the **Academic Roster Inquiry** screen, you can select the **CANCEL ALL** icon to exit **RSTR** and return to the main menu.

How to Log Out

When you are finished using Colleague you will need to exit Datatel. To log out, select **File** on the **Menu Bar**. Select **Exit** from the File Menu and you will be logged out.



Mnemonic Quick Reference Sheet



SPRO- Student data (including program, advisor, phone number, and address)

PCIN-Student data (phone number and email address only)

TSUM-Student test scores (including ASSET, COMPASS, SAT & ACT, Advanced Math Placement, and Computer Competency scores)

TRCL-Student transcript (view only)

TRAN-Student transcript (Student Records view, view and print option)

STSC-Student schedule

PPIN- Student PIN numbers

FADV-Assigned Advisee Listing

XAAR-Assigned Advisee Listing (Print option)

RGAM- View Course Status and Seat Availability

RSTR-Course Roster

