


Colleague Data Entry Tips & Tricks

Tip/Trick	Details
<p>Enter '...' at most LookUp prompts as a wildcard</p>	<p>Use '...' at most LookUp prompts or fields with the '...' symbol to the right as a wild card.</p> <div data-bbox="349 373 1318 709" style="border: 1px solid gray; padding: 10px; margin-bottom: 10px;"> <p style="text-align: center;">Acad Program LookUp</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;">Acad Program LookUp</div> <div style="display: flex; justify-content: space-around; border-top: 1px solid gray; border-left: 1px solid gray; border-right: 1px solid gray;"> Ok Cancel Finish Help </div> </div> <div data-bbox="349 743 657 800" style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> <input style="width: 100%;" type="text"/> </div> <p>Ex: If you wanted to look for the academic program of "AA.BUSN" you could search:</p> <ul style="list-style-type: none"> • ... (will find all programs in Colleague) • AA... (will find all programs starting with AA) • ...B... (will find all programs with the letter B such as Business or Biology) • AA...N (will find all programs starting with AA and ending with N) <p>Note: This wildcard is not allowed when looking up a person, organization, or institution.</p>
<p>Enter '@' at most LookUp prompts to search for the most recent record/code</p>	<p>Use the '@' symbol at most LookUp prompts to search for the most recent record. This can be used for person records, organization records, and codes.</p> <div data-bbox="349 1171 1081 1430" style="border: 1px solid gray; padding: 10px; margin-bottom: 10px;"> <p style="text-align: center;">Person LookUp</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;">@</div> <div style="display: flex; justify-content: space-around; border-top: 1px solid gray; border-left: 1px solid gray; border-right: 1px solid gray;"> Ok Cancel Finish Help </div> </div> <p>Ex: If you have John Doe's record up on NAE and you move to a form not requiring a person record in context (such as a parameter form), when you go to any other form requiring a person record in context, you will not need to re-search for John Doe using his name. You can just use the '@' sign.</p>
<p>Enter '=' to retain formatting</p>	<p>Use the '=' sign at most free-form text fields for Colleague to retain the formatting of text as you typed it. By default, Colleague honors capitalization rules of mixed case, meaning the first letter of every word is capitalized. In some cases, such as acronyms, you may not want the capitalization rules to be honored. Once you move to another field, the '=' will not be seen.</p> <div data-bbox="349 1703 813 1766" style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> <p>Name <input style="width: 50px;" type="text" value="1"/> =PNC Bank</p> </div>
<p>↑↓ for Multivalued Fields</p>	<p>When entering a value into a multivalued field, Colleague will often move the cursor to the next line, making it appear that what you entered has "disappeared". You can use the up arrow on your keyboard to view the previous entry. Likewise, you can use the down arrow on your keyboard to view the next entry of a multivalued field.</p>

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	<p>Multivalued fields have a number in front of them to indicate the current line:</p> <div data-bbox="349 262 787 325" style="border: 1px solid gray; padding: 2px;"> <input type="text" value="1"/> <input type="text" value="BUSN-101"/> </div>
Entering Dates	<p>Colleague honors the date settings on INTL to determine what the date formatting should be for short and long dates. If you do not include the first two digits of the four digit year, Colleague will assume the current century until 2029.</p> <div data-bbox="349 483 779 535" style="border: 1px solid gray; padding: 2px;"> Start/End Date <input type="text" value="01/01/1930"/>  </div> <ul style="list-style-type: none"> Entering 'XXXX29' = XX/XX/2029 Entering 'XXXX30' = XX/XX/1930 <p>Dates can be entered with or without separators. Separator options between month, day and year include "-" (hyphen), "." (period) or "/" (forward slash). Without separators, all 6 digits of a date can be entered (e.g., 010120 for 01/01/2020). For current year dates, year is not required (with or without separators).</p>
Entering Times	<p>If AM or PM is not specified, Colleague will assume AM. Colleague honors military time. When entering time in increments less than one hour, you must use the four digit time. You can enter the colon (:) delimiter but it is not required.</p> <div data-bbox="349 913 706 976" style="border: 1px solid gray; padding: 2px;"> Start/End Time <input type="text" value="03:00PM"/> </div> <ul style="list-style-type: none"> Entering '3' = 3:00AM Entering '3p' = 3:00PM Entering '0330' = 3:30AM Entering '15' = 3:00PM Entering '1500' = 3:00PM
Pref Name & Mail Name	<p>The Pref Name & Mail name default to Prefix, First name, Middle name, Last name, Suffix from NAE and will update automatically when a change is made to one of the mentioned fields. If you override either the Pref Name or Mail Name, these fields will no longer automatically update when a change is made to one of the fields from which it would calculate.</p> <div data-bbox="349 1312 787 1428" style="border: 1px solid gray; padding: 2px;"> Pref Name <input type="text" value="Kayla Leann Orr"/> Mail Name <input type="text" value="1"/> <input type="text" value="Kayla Leann Orr"/> </div> <p>To change the format of the <i>Pref Name</i> field (overriding the impact of the automatic calculation from other fields for this record only):</p> <ul style="list-style-type: none"> Enter 'im' = Prefix, First initial, Middle name, Last name, Suffix Enter 'ii' = Prefix, First initial, Middle initial, Last name, Suffix Enter 'fi' = Prefix, First name, Middle initial, Last name, Suffix Enter 'fm' = Prefix, First name, Middle name, Last name, Suffix (spelled out)
Enter ';DATAELEMENT VALUE' at most LookUp prompts to for advanced searches	<p>Entering a semicolon, no space, a data element in Colleague, space, and the data element value in a LookUp prompt will return the search results that meet your search criteria.</p> <p>Ex: I want to search for all people whose address state is FL for Florida from the NAE form. I would enter:</p>

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	<div data-bbox="349 226 1101 491" data-label="Form"> <p style="text-align: center;">Person LookUp</p> <input data-bbox="375 359 1068 407" type="text" value=";ST FL"/> <table border="1" data-bbox="349 443 1101 491"> <tr> <td>Ok</td> <td>Cancel</td> <td>Finish</td> <td>Help</td> </tr> </table> </div> <p data-bbox="349 520 1523 583">Ex: I want to search for all courses whose academic level is GR for Graduate from the CRSE form. I would enter:</p> <div data-bbox="349 611 1101 875" data-label="Form"> <p style="text-align: center;">Course LookUp</p> <input data-bbox="375 743 1068 791" type="text" value=";CRS.ACAD.LEVEL GR"/> <table border="1" data-bbox="349 827 1101 875"> <tr> <td>Ok</td> <td>Cancel</td> <td>Finish</td> <td>Help</td> </tr> </table> </div> <p data-bbox="349 905 1495 968">More than one search criteria can be specified separated by a space. All entered criteria must be true to receive results.</p> <p data-bbox="349 997 1523 1060">Ex: ;CRS.ACAD.LEVEL UG ;CRS.COURSE.TYPES HON would return a list of courses with the UG (undergraduate) academic level and a course type of honors.</p> <p data-bbox="349 1089 1227 1121">Relational operators can be specified between the data element and value.</p> <ul data-bbox="396 1123 790 1346" style="list-style-type: none"> • NE = not equal • GT = greater than • GE = greater than or equal to • LT = less than • LE = less than or equal to • LIKE = like a pattern • UNLIKE = unlike a pattern <p data-bbox="349 1375 1456 1407">Ex: ;CRS.MIN.CRED GT 3 returns a list of courses whose minimum credits are greater than 3.</p>	Ok	Cancel	Finish	Help	Ok	Cancel	Finish	Help
Ok	Cancel	Finish	Help						
Ok	Cancel	Finish	Help						
<p data-bbox="94 1606 310 1759">Enter '/' before your search at most LookUp prompts to search by Soundex</p>	<p data-bbox="349 1440 1511 1503">Use '/' directly in front of a person or organization search at most LookUp prompts to search by the phonetic sound of the word, rather than matching characters.</p> <p data-bbox="349 1533 1490 1596">Ex: The name Candy could also be spelled Kandy. If I search for '/Candy', I will get any person in Colleague whose first name phonetically sounds like 'Candy'.</p> <div data-bbox="349 1623 1125 1892" data-label="Form"> <p style="text-align: center;">Person LookUp</p> <input data-bbox="375 1755 1092 1803" type="text" value="/Candy"/> <table border="1" data-bbox="349 1839 1125 1892"> <tr> <td>Ok</td> <td>Cancel</td> <td>Finish</td> <td>Help</td> </tr> </table> </div>	Ok	Cancel	Finish	Help				
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Use the Input # from the Search Results to select your record without clicking on it.	<p>Colleague displays a Search Results window when it finds a match to your search criteria. Your cursor is automatically placed in the Input field within the Search Results window. Type the corresponding sequence # of your desired record to select it. (Alternatively, you could click the record with your mouse and then click Open or you could double-click the record to select and open it).</p> <p>Ex: In my search for 'Smith', Colleague found multiple records. I want to select and open 'Arthur Dean Smith' so I will type a '3' in the Input window and then press Enter on my keyboard.</p> <div data-bbox="349 499 1377 787"> <p>SEARCH RESULTS FOR : PERSON smith</p> <p>Combined Input <input type="text" value="3"/> Open</p> <table border="1"> <thead> <tr> <th>#</th> <th>Name</th> <th>Address Line</th> <th>DOB</th> <th>ID</th> <th>Address CSZ</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Jamie Brown-Smith</td> <td>4365 Big Horn Wy</td> <td></td> <td>0001318</td> <td>Cheyenne WY 82001</td> </tr> <tr> <td>2</td> <td>Kayla Leann Orr</td> <td>4000 Central Florida Blvd</td> <td>09/13/1996</td> <td>0003472</td> <td>Orlando FL 32816</td> </tr> <tr> <td>3</td> <td>Arthur Dean Smith</td> <td>13966 Elm Rd S Apt 137</td> <td>10/30/1993</td> <td>0003153</td> <td>Birmingham AL 35296</td> </tr> <tr> <td>4</td> <td>Audrey Danielle Smith</td> <td>21839 Broadway Ave NW</td> <td></td> <td>0001804</td> <td>Pittsburgh PA 15210</td> </tr> <tr> <td>5</td> <td>Chester Johnny Smith</td> <td>8302 Union Way N</td> <td>02/26/1994</td> <td>0003278</td> <td>Marshall TX 75670</td> </tr> </tbody> </table> </div>	#	Name	Address Line	DOB	ID	Address CSZ	1	Jamie Brown-Smith	4365 Big Horn Wy		0001318	Cheyenne WY 82001	2	Kayla Leann Orr	4000 Central Florida Blvd	09/13/1996	0003472	Orlando FL 32816	3	Arthur Dean Smith	13966 Elm Rd S Apt 137	10/30/1993	0003153	Birmingham AL 35296	4	Audrey Danielle Smith	21839 Broadway Ave NW		0001804	Pittsburgh PA 15210	5	Chester Johnny Smith	8302 Union Way N	02/26/1994	0003278	Marshall TX 75670
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Enter values to be evaluated in rules and additional selection criteria in capital letters and within quotation marks.	<p>Either single or double quotes can be used.</p> <div data-bbox="349 877 1523 1423"> <p>Checking Criteria</p> <table border="1"> <thead> <tr> <th>Connector</th> <th>Left-hand Expression</th> <th>Relation</th> <th>Right-hand Expression</th> </tr> </thead> <tbody> <tr> <td>1 EVERY</td> <td>PST.ACTIVE.RESTRICTIONS</td> <td>NE</td> <td>'BUS'</td> </tr> <tr> <td>2</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Additional Select Criteria</p> <table border="1"> <thead> <tr> <th>Connective</th> <th>Field Name</th> <th>Relation</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>1 WITH</td> <td>SCS.STATUS</td> <td>EQ</td> <td>'A'</td> </tr> </tbody> </table> </div>	Connector	Left-hand Expression	Relation	Right-hand Expression	1 EVERY	PST.ACTIVE.RESTRICTIONS	NE	'BUS'	2				Connective	Field Name	Relation	Value	1 WITH	SCS.STATUS	EQ	'A'
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Keyboard Shortcuts

This document describes the keyboard shortcuts available in Colleague UI. Many shortcuts work for both Windows machines and Macs. Some sections below are repeated when there are significant differences.

Colleague UI Feature Shortcuts

The following shortcuts are available from most places in Colleague 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 For Windows

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**

Field Text Editing Shortcuts For Mac

The following shortcuts are available for text entry boxes:

- Select all text in input area: **Cmd+A**
- Copy selected text: **Cmd+C**
- Delete a character or selected text: **Delete**
- Cut selected text: **Cmd+X**
- Paste text in clipboard: **Cmd+V**
- Delete the character to the left: **Ctrl+H** or **Delete**
- Delete the character to the right: **Ctrl+D** or **Fn+Delete**
- Extend text selection one character to the left: **Shift+Left Arrow**
- Extend text selection one character to the right: **Shift+Right Arrow**
- Select the text to beginning of field: **Shift+Cmd+Left Arrow**
- Select the text to end of field: **Shift+Cmd+Right Arrow**
- Move to beginning of the current input area: **Cmd+Left Arrow**
- Move to end of the current input area: **Cmd+Right Arrow**
- Move to beginning of the previous word: **Opt+Left Arrow**
- Move to end of the next word: **Opt+Right Arrow**
- Move one character forward: **Ctrl+F**
- Move one character backward: **Ctrl+B**
- Undo the previous command: **Cmd+Z**
- Redo; reverse the undo command: **Cmd+Y** or **Shift+Cmd+Z**

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**
- Open Colleague Attachments dialog: **Ctrl+Alt+T**
- 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**

Windows Accessibility Shortcuts:

The keyboard shortcuts listed below are available when working within a UI form using assistive technology software, specifically JAWS and NVDA. The Access Forward and Back keys allow movement between fields on a form regardless of whether the field is inquiry or maintainable. Access Forward will change focus to the next field on the form as defined by the form's field order. Access Back will change focus to the previous field on the form. When focus is on an Envision window field, the Access Forward and Back keys function as Tab and Shift+Tab, respectively.

There are two options for reading data in the row of Envision windows. Read Window Row will read column and data information according to the Verbose Accessibility setting in the Miscellaneous section of the Preferences panel. If this flag is checked, Read Window Row will read verbose data, including the name of the window, the column number, the name of the window element, whether the element is maintainable or inquiry, and the value of the element. If this flag is unchecked, Read Window Row reads only the column number and the element value. Elucidate Window Row Detail reads the verbose version of Read Window Row. **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.

Colleague Form Shortcuts

- Announce Current Form: **Ctrl+Shift+F**
- Read all Inquiry fields on a form: **Ctrl+Alt+I**
- Access Forward: **Ctrl+Alt+] (right bracket)**
- Access Back: **Ctrl+Alt+[(left bracket)**
- Read Window Row: **Ctrl+Alt+- (hyphen)**
- Elucidate Window Row Detail: **Ctrl+Shift+Y**
- Move focus to Context Header: **Ctrl+Alt+W**

The keyboard shortcuts listed below are available when in Accessibility Mode and focused on the Input box for 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**
- Read key for result number n : **R n**
- Read details for result number n : **RD n**
- Toggle selection of row n : **T 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**
- Show search input options: **?**

The accessibility keyboard shortcuts listed below are available when focused on the Input box for a **Form Search Results** panel and in Accessibility Mode.

- Execute result n : n (enter the number)
- Read results row n : **R n**

- 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**