

Colleague User Interface (UI) Form

The Colleague User Interface Window consists of four components: the **Main Form Area**, the **Side Tool Bar**, the **Context Area**, and the **Top Tool Bar**.

Main Form Area

1. Click the Favorite icon to add the Colleague UI to your favorite forms.
2. The form options available to you are:
 - a. **Save**. Saves data on the current form.
 - b. **Save All**. Saves data on all open forms.
 - c. **Cancel**. Cancels changes made on the current form.
 - d. **Cancel All**. Cancels changes on all open forms.

Form Search Results Panel – Grid View

FORM SEARCH RESULTS FOR: ADDRESS Input Open

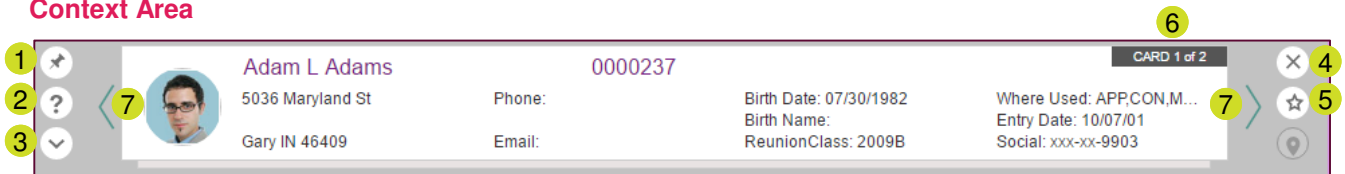
#	Name	Mnemonic	Application
1	Common App Name and Address	CNAE	ST
2	PERS Address	You can reorder and sort columns	

Side Tool Bar



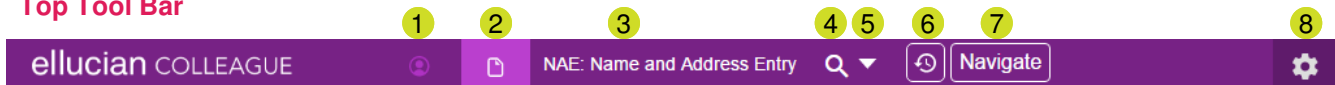
1. **Favorites.** Display the people and forms you have added as Favorites.
2. **Help.** Access help for the Colleague UI form in the Main Form Area.
3. **Logout.** Click this icon to log out of Colleague.
4. **Print.** Click this icon to print the form.
5. **Form Size Slider.** Use this slider to increase or decrease the size of the form in the Main Form Area.

Context Area



1. **Push Pin.** Click the push pin to keep the record(s) in the Context Area when moving between forms.
2. **Help.** Click the question mark to access help for the Context Area.
3. **View All Records.** Click this icon to view all the records in the Context Area.
4. **Cancel.** Click the cancel icon to cancel one record or all records in the Context Area.
5. **Favorite.** Click the Favorite icon to add the record(s) in the Context Area to your Favorite People.
6. This information states which record of those records in the Context Area is currently displaying.
7. Use the right and left arrows to move between the records in the Context Area.

Top Tool Bar



1. **Person Search.** Click to toggle on Person Search.
2. **Form Search.** Click to toggle on Form Search.
3. **Search Area.** Enter a person or form to search for in this box.
4. **Search.** Click this icon to search using the information entered in the Search Area.
5. **Search History.** Click the down arrow to display the Form Search History or Person Search History.
6. **Show Form Search Result.** Click the clock icon to display the last search results.
7. **Navigate Button.** Click the Navigate button to browse for a form by Colleague application.
8. **Preferences.** Click the gear icon to configure your preferences.



9. **Advanced Person Search.** When in Person Search, click the Advanced button to access the Advanced Person Search form.

Person Search Results Panel – Card View

Search Results For:	Filter	Input	Help	Cancel
PERSON	Combined		?	X
1 Coriann I Caldwell ID: 0002761 Social: xxx-xx-4958	7539 Coffey Six Lane Charlotte NC 28273 Source:	DOB: 05/18/1991 Birth Last: Where Used: MAI,FIN		
2 Harry Maxwell Callow ID: 0000229 Social: --	560 1st St Lake Oswego OR 97034 Source: FAC	DOB: 04/16/1968 Birth Last: Where Used: CON,FAC,MAI,STA,HRP...		
3 Calais High School ID: 0000125 Social: --	RR 1 Box 22B Calais ME 04619 Source:	DOB: Birth Last: Where Used: COR,INS,MAI		
+ Add	1 - 3 of 3	Excel Export	Open	0 Selected <input type="checkbox"/> Select All

- Results View.** Toggle between Card View and Grid View of the Search Results.
- Filter.** View only people, only organizations, or a combined list of both.
- Search Results Help.** Click the question mark to access help for the Search Results panel.
- Cancel.** Click this icon to cancel from the Person Search Results panel.
- Add a New Record.** Click the Add button to add a record from the Search Results panel. You must search for the record from the LookUp prompt.
- Excel Export.** Click the Microsoft Excel icon to export the search results to Microsoft Excel.
- Select All.** Click this check box to select all the records returned by the search.

Preferences

Preferences
Personal appearance settings. Changes apply to your user only.

PRIMARY COLOR Restore Default Color

1 [Color Selection]

MISCELLANEOUS

Number of Search Results Per Page:
Card View: 8 | Grid View: 20

2 Automatically Close Bar Graph When Finished

3 Play Error Sound on Error Messages
 Verbose Accessibility (screen reader)
 Show Full Page Report Browser View

Display Person Photos: Yes No 4

Note: Your institution may have permanently disabled photos in certain areas, so this setting might not be changeable or have the direct effect. Contact your system administrator for more details.

5 ? 6 X

OK Cancel Restore Defaults

- Primary Color.** Select the color theme for your Colleague UI session.
- Number of Search Results Per Page.** Select the number of records to display in Card View and in Grid View for the Search Results panel.
- Miscellaneous Options.** Click the check box(es) for the option(s) to deploy for your Colleague UI session.
- Display Person Photos.** Indicate if you want person photos to display when the Search Results panel is in Card View.
- Preferences Help.** Click this icon to access help for Preferences.
- Close Preferences.** Click this icon to close the Preferences dialog box.