

EVAL (Degree Audit) for Administrative Assistants and Administrators

If you have not used the new web version of Colleague before, please refer to the [“Colleague User Interface 4.3 – Basic New Features UIWeb”](#) document or the demo provided when opening the Datatel UIWeb version of Colleague to help you get familiar with basic changes.

Refer to [“UIWeb 4.3 Newest Feature Changes”](#) to explore some beneficial additions.

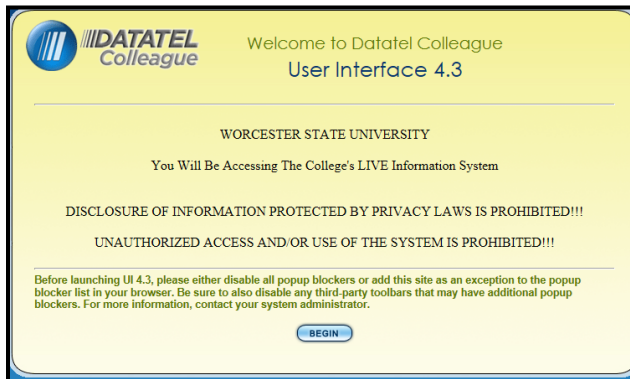
- A Degree Audit evaluates a student’s progress towards the completion of their academic requirements.
- **IMPORTANT NOTE:** Although advisors guide their advisees during the advising process, it is possible for both advisors and students to use WebAdvisor to perform a degree audit report any time they want. Faculty will find a link under My Advisees. **This negates the need for Administrative Assistants to print Student Advising Transcripts.**
- **When it is necessary for an authorized Administrator or Administrative Assistant to run a degree audit report using Colleague, it can be done using the EVAL form.**

Logging Into Datatel’s Colleague UIWeb 4.3

1. Double-click the Datatel **UIWeb** icon  on your Desktop.

Datatel’s Colleague User Interface 4.3, known as UIWeb, launches and a welcome screen displays.

If you have difficulty, keep only basic Internet Explorer (or Firefox) toolbars available. Close toolbars such a “Google”. Then, see if UIWeb launches.



2. Click the **Begin** button to access the Login screen.



3. In the **UserID** box, type the **Colleague UserID** provided by Information Technologies in **ALL CAPITAL letters** (e.g. JLANCER).

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Logging into Datatel's Colleague UIWeb

4. In the **Password box**, type your Colleague/UIWeb password.

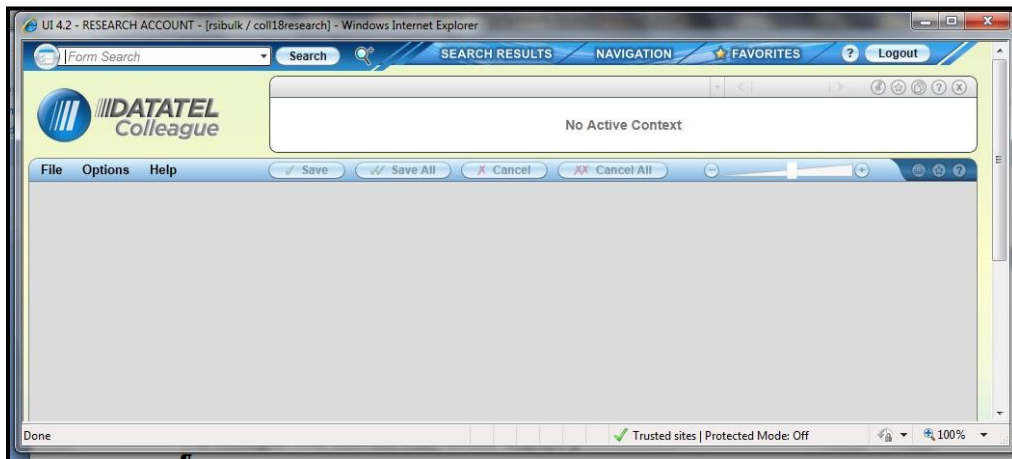
Passwords are “case sensitive”, so make certain to type lowercase or capital letters the way your password was created. Then, click the **LOGIN** button or press the **<Enter>** key.

An “authentication” process runs to verify your access credentials, followed by the display of the UIWeb main window.

5. If the “Quick Tour” screen displays:

View the “Quick Tour” video, if desired, or click in the the “Do Not Show Me Again” checkbox to hide it from view when UIWeb starts..

The Quick Tour demo always is available from UIWeb Help menu.



6. Once the Quick Tour is viewed, the user will proceed to the main Datatel Colleague (UIWeb) screen.

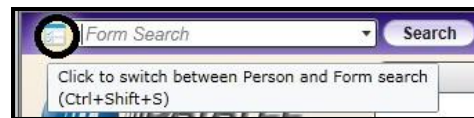
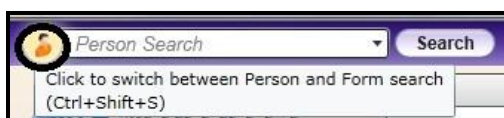
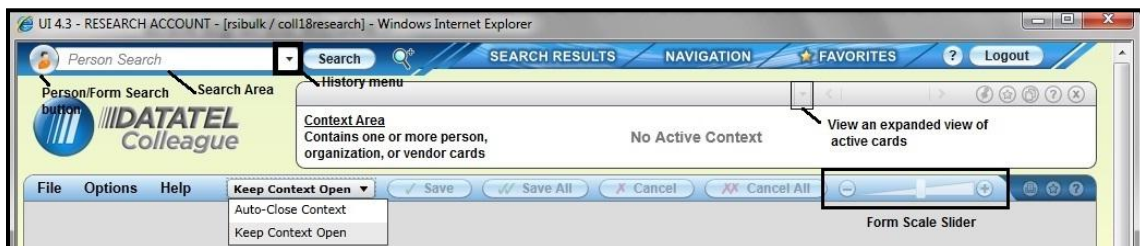
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- A “Person Search” allows a user to locate and work with an individual, group of individuals, vendors, or institutions within the same form. It is a way to populate the **Context area** (top area of the window) with one or many records, called “Person Cards” in Colleague UIWeb. Information displayed in the form reflects data stored in Colleague for the person, group, or institution whose card is active.

The Next and previous  record arrows are used to move between desired Person cards.

- **Always be aware of what is active in your context area.** It might be necessary to close out both the form AND the context area if there are active records you no longer want to use.
- When you’re done with a form, it’s best to close out the context area instead of the form, especially if you’re done with the form and the individual, institution, or groups. That way, you’ll clear out your context area and the form and will be starting with a clean slate.
- When working with one person, it might be preferable to bring up the form first and perform a standard name lookup.

The Search Area – Opening a Person Card and Form



1. In the **Search** area, click the circular **Person/Form** button until the **Person** Search button displays.
2. Type the **Person’s Name** (at least two letters of the Last Name, Two letters of the First Name, separated by a comma) or **Student ID#** for the person, institution, or vendor whose data you wish to obtain from Colleague in the Search box, and click **Search** or Press <Enter>.

If a group of students has been saved to Favorites, click the Favorites tab to locate them.

. Person Cards that match requested search criteria display in the Context area

If available and the option is activated, WSU ID Photos might appear to the left of the person’s name.

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The Search Area – Opening a Person Card and Form (Continued)



3. Select desired Person cards by **clicking inside either the Select All box or the appropriate white boxes to the left of each desired Person's ID #**. Then, click **Open** at the bottom of the screen or Press <Enter>.

Selected people cards open and become active by clicking the Previous (<) or Next (>) arrows.



Click the Hide Panel (Esc) button at the bottom of the window to hide the selected Search Results, Navigation, or Favorites tab screen from view.

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- Colleague uses a “drill-down” approach to access information in its database.

Expand folders to view and/or move to different levels within the Colleague’s Student System or other Application area.

Use the Navigation tab to locate and open forms by double-clicking the form’s icon.

A Degree Audit evaluates a student’s progress towards completion of their academic requirements.

IMPORTANT NOTE: Although advisors guide their advisees during the advising process, it is possible for both advisors and students to use WebAdvisor to perform a degree audit any time they want. Faculty will find a link under My Advisees. **This negates the need for Administrative Assistants to print Advising Transcripts on a routine basis.** Students can be asked to bring a copy of the EVAL report to their meeting with their advisors.

When it is necessary for an authorized Administrator or Administrative Assistant to run a degree audit report using Colleague, it can be done using the EVAL screen.

Run a Degree Audit Evaluation

1. In the **Search** area, click the radio button (circle) to the left of **Form** to select it.
2. Type **EVAL** in the Search box and click the **Search** button or Press <Enter>.

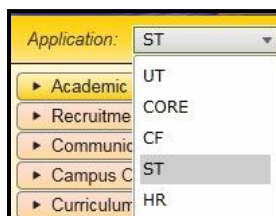
If a Person Card is not already open and visible in the context area, the Person LookUp prompt displays.



A yellow dialog box titled "Person LookUp:" with a search input field and three buttons: "SUBMIT", "CANCEL", and "FINISH".

3. If the EVAL form does not display, the form can be accessed using its **icon** located with a “drill down” approach from the **Navigation tab**. If the form displays, proceed to Number 4.
 - a. Click the **Navigation tab** to bring it to the front.
 - b. If the **ST** Application is not active, select it from the Application drop-down menu.

This moves you to the “student” area of (UIWeb).



A screenshot of the "Application:" drop-down menu. The menu is open, showing a list of applications: Academic, Recruitme, Communic, Campus C, and Curriculum. The "ST" application is selected and highlighted.

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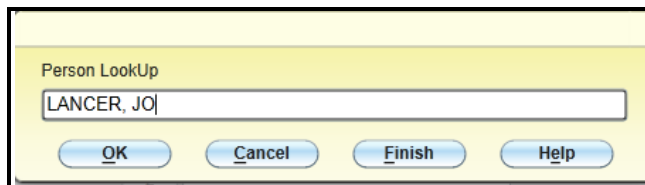
Run a Degree Audit Evaluation (Continued)

- c. Click the **black triangle** to the left of **Degree Audit – DA** to expand and display the contents.



- d. Double click the **Evaluate Student Program – EVAL** icon to open the form.

If a Person card is not already open in the Context area, the Person Lookup box displays.

A screenshot of a 'Person Lookup' dialog box. It has a yellow background and a title bar. The text 'Person LookUp' is at the top. Below it is a text input field containing 'LANCER, JO'. At the bottom, there are four buttons: 'OK', 'Cancel', 'Finish', and 'Help'.

4. Type the **ID #**, **Name**, or partial name for the student whose progress you wish to evaluate. Then, click the **OK** button or Press <Enter> to view the results. Or.... Click the **Finish** button to close the Evaluate Student Program - EVAL form and return to the main Colleague (UIWeb) window

Open People cards remain in the Context area at the top of the window.

5. In the **Search** area, click the **Person/Form** button (circle) until the **Form** displays.



6. Type **EVAL** (Evaluate Student Program) in the Search box, and click the **Search button** or Press <Enter>.

If a Person card is not already open and displaying in front of other Person cards in the Context area, the Person Lookup box displays so you can use the steps explained earlier to enter and select the desired student name.

A screenshot of a 'Student Lookup' dialog box. It has a yellow background and a title bar. The text 'Student LookUp:' is at the top. Below it is a text input field. At the bottom, there are three buttons: 'SUBMIT', 'CANCEL', and 'FINISH'.

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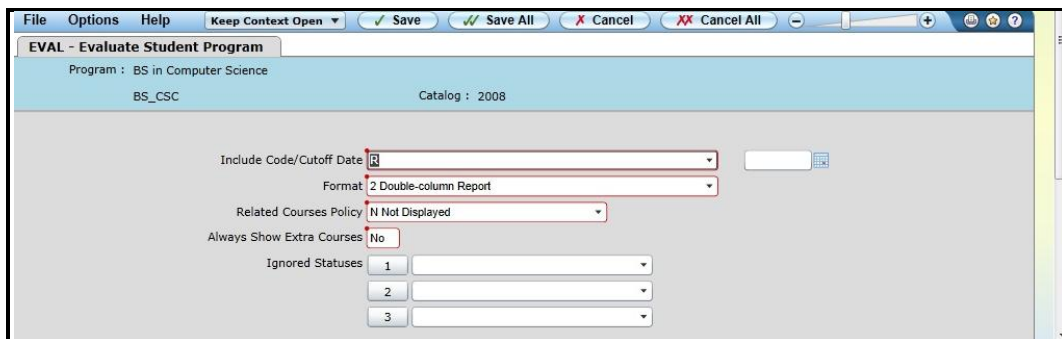
Run a Degree Audit Evaluation (Continued)

7. If a screen similar to the one below displays, scroll to the bottom of the window and enter the **number** to the left of the **Active** program in the Select # box.



8. Click the **Open** button or Press <Enter>.

The EVAL – Evaluate Student Program screen displays:



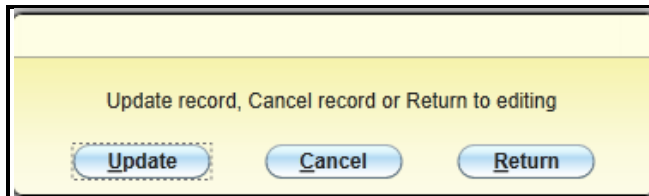
A Double-column Report is selected by default, in order to conserve paper. .

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Run a Degree Audit Evaluation (Continued)

- Click the **Save** button.

The Update record, Cancel record, or Return to editing Alert displays.

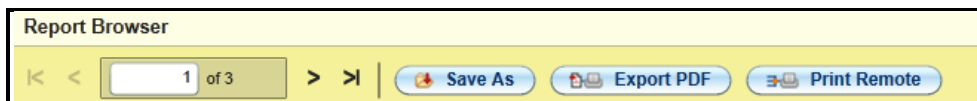


- When the **Update** record, Cancel record, or Return to editing Alert displays, click the **<Update>** button to run the report.

A copy of the student's Worcester State University Academic Evaluation displays.

- Review the evaluation on the screen. If a paper copy is required, [BE MINDFUL OF FERPA GUIDELINES](#) and use the **Export PDF** or **Print Remote** buttons to print to your defined printer.

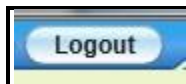
Use the directional arrows to move forward or backward through pages of the EVAL report.



- To Exit the Report Browser, click the small black X in the upper right-hand corner of the browser window.
- If another report evaluation is needed, enter the student's name in the Person Lookup box. Otherwise, click the **Finish** button to return to the main Colleague screen.

Logout of Colleague

- If you are finished using UIWeb, make certain click the **Logout** button in the upper right-hand corner of the UIWeb window.



- Close the browser window.