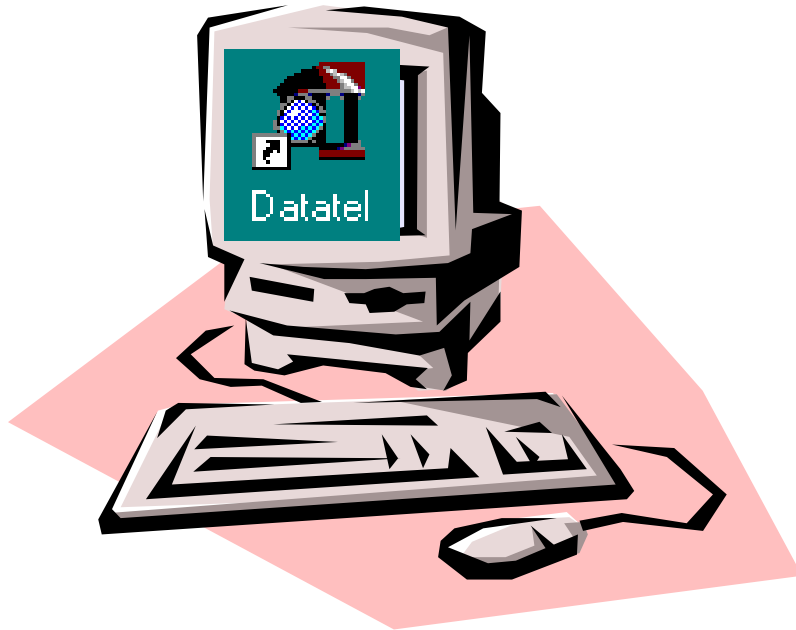


/// DATATEL



Datatel

Colleague exists as several databases on a dedicated server. Each database is separate; changes made in one do not affect another.

Databases:

Collive – is Meredith’s live data on all current students. (The Real Stuff)

Coleduc – sample data (provided by Datatel as an example, it is not Meredith data)

Coltest – this database were users can go to and experiment with non-existing accounts

A database is made up of Applications: Core, ST, CF, HR.

Applications contains modules, which are collections of screens

Core – Demographic data (name, address, etc.)

ST – Student data

CF – Financial data

HR – Human Resources data

From the Core application, you can’t see screens from HR, ST or CF. However, you can see Core screens from ST, HR, and CF. Which application you choose with determine which screens you can see.

The main file in Core is called PERSON. Every person or organization will have a record in this file. The Core screen you will commonly use is the NAE screen (Name and Address Entry).

Important information to know:

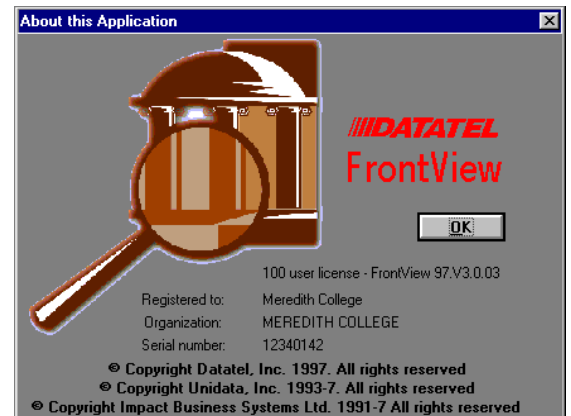
- ✓ Every person or organization needs a record in the PERSON file.
- ✓ They will be automatically be assigned a unique seven-digit id number.
- ✓ If you try to look up a person who does not have a record in the PERSON file, you will be presented with the NAE screen.

Getting Started in Datatel

Logging into Datatel

How do I login?

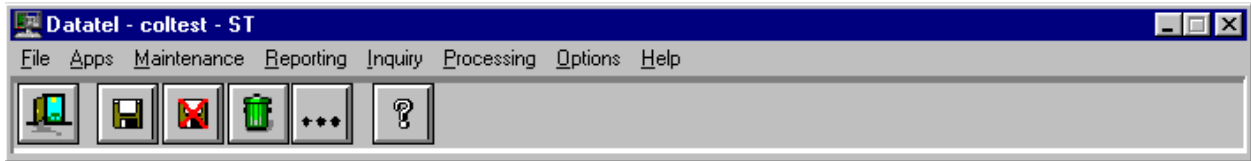
Locate the Datatel Icon on your Desktop and Double click the Icon. A FrontView Login box will appear.

A screenshot of the "FrontView Login" dialog box. The dialog box has a blue title bar and a grey background. The text "Enter a User ID, Password and Database:" is centered at the top. Below this, there are three input fields: "User ID:" with the text "doej", "Password:" with "*****", and "Database:" with a dropdown menu showing "coltest". At the bottom, there are two buttons: "OK" and "Cancel".

*Make Sure Your Caps Lock Is Not ON!

- **Key in your User ID**
Tech Services will provide you with your User ID. This is typically your last name, followed by your first initial. (Example- doej)
- **Key in your Password**
Tech Services will provide you a temporary password, which must be changed after the first initial login. The Password must contain both numbers and letters and must be at least 6 characters.
- **Select the database**
Make sure you select the correct database. Click the arrow to the right of the box and a drop down list will appear. Now select the database.
- **Click on OK**
- **Be patient**

Datatel Toolbar



Here is the Datatel toolbar. You will use this to do a task or bring up a screen. There are three ways to run a screen:

1. Navigate the menu system.
2. Select File Run from the tool bar and enter a mnemonic.
3. Select File from the tool bar and choose from the history list. It lists the last five screens that you have run.

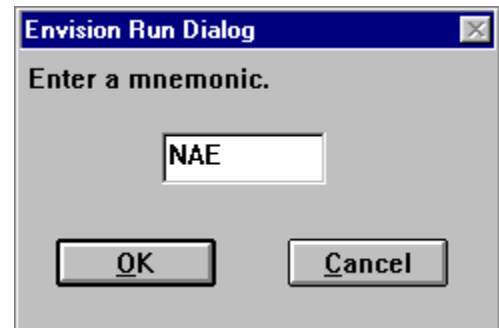
Types of Screens:

1. Maintenance – data entry
2. Reporting – run reports
3. Inquiry – view only
4. Processing – writing data to the database, batch processing

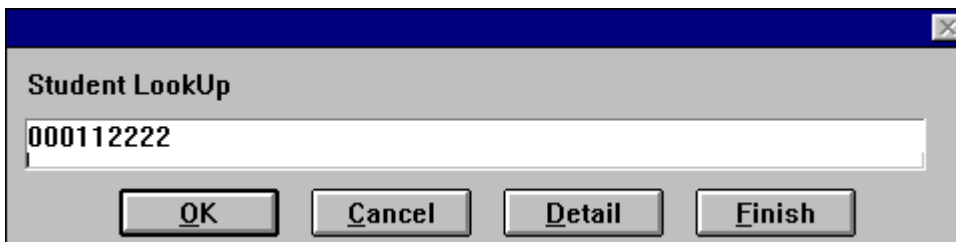
Screen access is determined by which Application you are in. Change your application by choosing Apps from the toolbar and selecting one from the list.

How Do I Look-up a Student?

To look up a person in Datatel, choose Run from the File menu. Enter the mnemonic for the screen and click ok.



Once you are at the screen, a Person Look-up dialog box will appear. This is where you will key in the SS# or the name of the student. If you have a SS#, use this first. Simply type the number in without dashes. If you do not find the student that way, they may still be in the database but not have a SS# entered. The next look-up to perform is a name look-up. Please see the following page for examples.



SS# Look-up

The screenshot shows a dialog box titled "Student LookUp" with a search field containing the text "Student, Meredith". Below the search field are four buttons: "OK", "Cancel", "Detail", and "Finish".

**Full Name
Look-up**

The screenshot shows a dialog box titled "Student LookUp" with a search field containing the text "Student...". Below the search field are four buttons: "OK", "Cancel", "Detail", and "Finish".

**Partial Name
Look-up**

The screenshot shows a dialog box titled "Student LookUp" with a search field containing the text "Student, Mer...". Below the search field are four buttons: "OK", "Cancel", "Detail", and "Finish".

**Partial Name
Look-up**

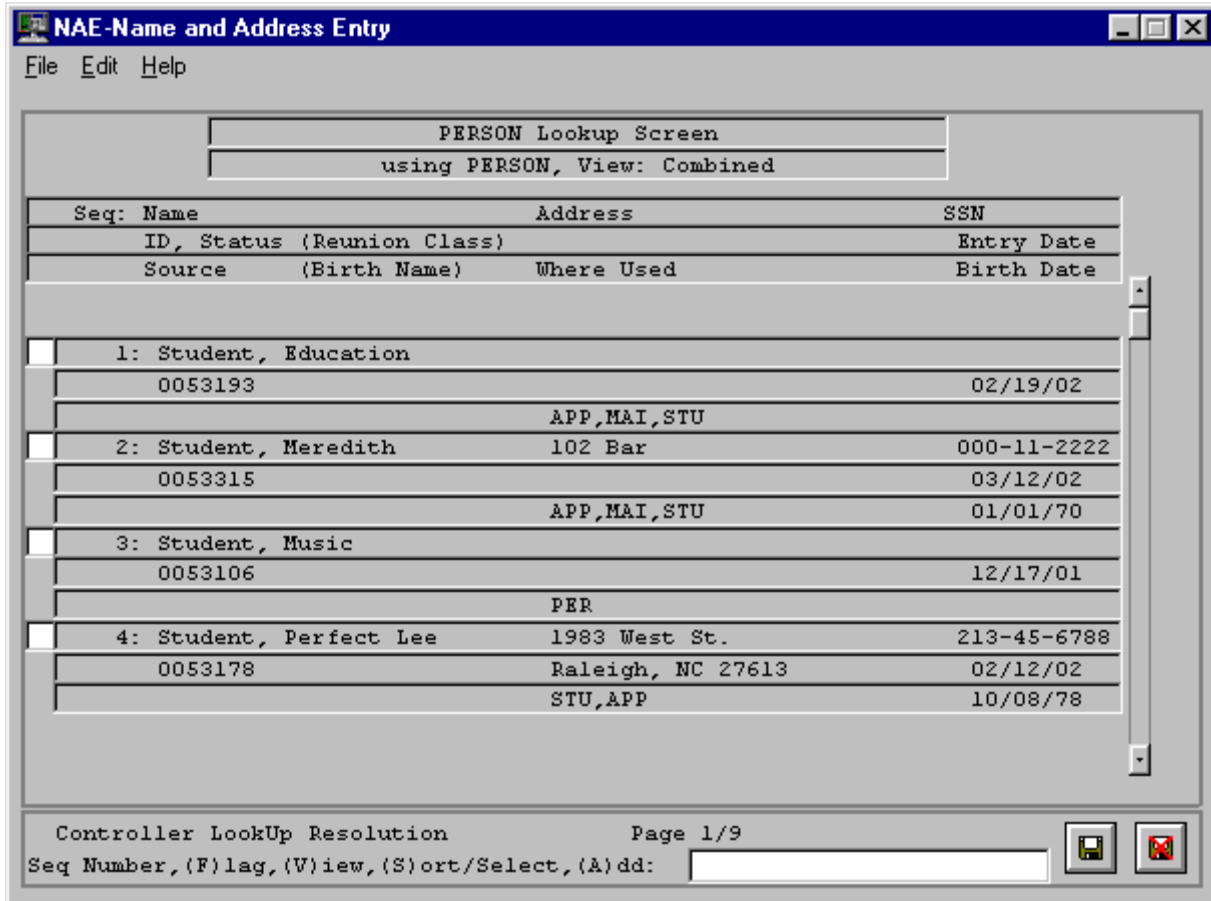
Remember

- Datatel id or social security number
You can ignore any leading zeroes when entering the Datatel id.
- Students may be entered under a called name
i.e. Student, Beth, therefore, a full-name look-up would not return her even though she is in the system (Last name, First name *or* First name<space>Last name)
- Students may be entered under a misspelled name
i.e. Students, Meredith instead of Student, Meredith
- Last name and then choose from the resolution screen
You can enter the first few letters of a person's name combined with '...'
example: to find someone whose last name is 'Schwartzenger', you could enter 'Schw...'

Remember:

- ✓ Always try their Datatel id or social security number first. If their record is not found, enter the person's full name. If there is a match you will see the resolution screen, listing from one or more records. From here you can make a selection.
- ✓ Be careful of nicknames (Kathy/Katherine) and spelling variations (Brandy/Brandi) when looking someone up.

If you look someone up by their SS# and they are in the system with that #, their record will come right up. If you do a name look-up, the PERSON look-up screen will come up so you can select which record you want from the list that met your criteria. To select the record you want, simply type the number that corresponds with the record or select the box next to the persons name and then click the diskette icon located at the bottom right of the screen. The default screen with the record you chose will come up.



- To close out and lookup another student click on the crossed out diskette and the look-up screen will appear again.

The screens will give you limited information; within the screens you will see highlighted fields. In these fields are hidden screen that you can obtain more information. Click in the highlighted field and click the F2 key, the hidden screen will appear.

The screenshot shows a window titled "NAE-Name and Address Entry" with a menu bar (File, Edit, Help). The main area has a red header with the text: "Student, Meredith ID: 0053315 SSN: 000-11-2222 Home: 760-7777". Below this is a form with the following fields:

| | | | |
|----------------|-------------------------------|----------------|---------|
| Prefix | | Person ID | 0053315 |
| Name LFM | Student | Meredith | |
| Suffix | | | |
| Address | 1 102 Bar | | |
| CSZ/Cnty | | | |
| Res Cnty/ | | | |
| Country | | Source | 1 |
| Phone/Ext/Type | 1 760-7777 | | |
| Origin/Date | ARST Student (Current) | 03/12/02 | |
| SSN | 000-11-2222 | Address Change | |
| Birth Date | 01/01/1970 | Source | |
| Ethnic/Gender | AI American Indian, Alaskan F | Date | |
| Mail Codes | 1 | By | DATATEL |
| E-Mail Adr | 1 H me@aol.com | | |
| Pref Name | Meredith Student | | |
| Mail Name | 1 Meredith Student | | |
| Other LFM | 1 | | |

Special Keys and Lookups

F1 *help*

Use this with most fields. It will bring up a small dialog box. Choose Codes for a list of allowable codes or More for more information. Click on Enough to close.

F2 *detail*

Use this with the dark blue fields. It will bring up another screen. For example, pressing F2 when you are on the address field in the Name and Address Entry (NAE) screen will bring up the Address Summary screen (ADSU).

...

Use this for a Lookup field. It will bring up a screen with a list of possible values.

[SHIFT] @

Will bring up the last record you viewed in the current session.

Some common error messages:

- ‘Password or login name incorrect’
 - Login name will usually be last name, first initial but is limited to 8 characters.
 - Password needs to be in lowercase.
- ‘Never found the login prompt’
 - Is the host machine working?
 - Possible network problem, attempt to access Netscape to isolate.
- ‘Improperly set up user’
 - Are you in the correct database?

Helpful Information:

Prefix

The prefix field is a required field. Press F1 for a list of codes. The majority of our undergraduate students will have a prefix of Ms. Gender specific prefixes will automatically populate the gender field also on the NAE screen.

Name Last, First

The last name and the first name are required fields. Middle name should be entered if given. If only middle initial is given, enter it followed by a period. When collecting data, you should make every effort to obtain middle name, as many in our database will have the same or similar names.

Address

Address is a required field. The street address should be entered on the first line if possible. If the maximum of 30 characters is exceeded, you may enter the second part of the address on line 2.

CSZ/CNTY

City, State & Zip are required fields. The county will automatically populate based on CSZ if it is required. You should not enter a county.

Country

Country should not be entered for the United States of America. A look-up can be done (...) for country codes if the country is not USA.

Phone/Ext/Type

A phone number should be entered if given. Always try to obtain this piece of information when collecting data. The phone extension is only entered when applicable. A phone type is required for each phone number entered. Press F1 for a complete list of phone types.

Origin/Date

The origin is a required field. The origin tells us how/why this person was put into the database. This information can be used by different office for studies and reports. Press F1 for a complete list of origin codes. The origin data automatically fills when an origin is entered.

Social Security Number

A social security number should be entered if given. Always try to obtain this piece of information when collecting data. The SSN is one of the best way to prevent duplicates.

Birth Date

The date of birth should always be entered if given. This date is entered mmddyy unless the year is 1929 or before.

Ethnic/Gender

The ethnicity should always be entered if given. Do a look-up (...) for a complete list. If someone gives an ethnicity that is NOT on the list, enter his or her ethnicity as OT (other). This list is maintained in conjunction with federal guidelines.

E-Mail Address

Anytime an e-mail address is entered, a type should also be entered. Press F1 for a complete list of e-mail types. E-mail addresses should be entered if given.

Other LFM

These fields should be used when someone has a name other than the one they are using, i.e. maiden name.