



# Datatel Training and Usage Guide

## Quick References

Datatel Instructions: <http://personal.southern.edu/emario/datatel.pdf>

URL: datatel.intranet.southern.edu

Datatel Support: 236-2703

Resetting Southern password: theplace.southern.edu

## Security

Do not share your SAU password with anyone

Data to protect: SSN, DOB, Addresses, ID #s, Names, Phone Numbers (any unique identifiers)

Do not divulge SAU information to unauthorized persons

Only pull up records you need for your job (no browsing – everything is on a need to know basis)

Do not save information to CDs, thumb drives, cloud services (Dropbox, Google Drive, etc.)

Do not save your information to your email account

Lock your screen with Windows key + L when leaving your desk.

Do not attempt to access SAU restricted resources from any computer other than your assigned SAU workstation.

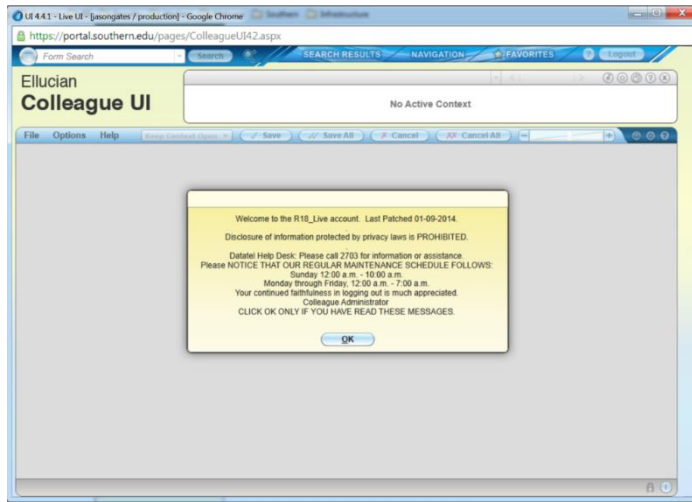
## Logging In

1. Using **Internet Explorer**, go to [datatel.intranet.southern.edu](http://datatel.intranet.southern.edu)
2. Click on **Colleague > Live**.

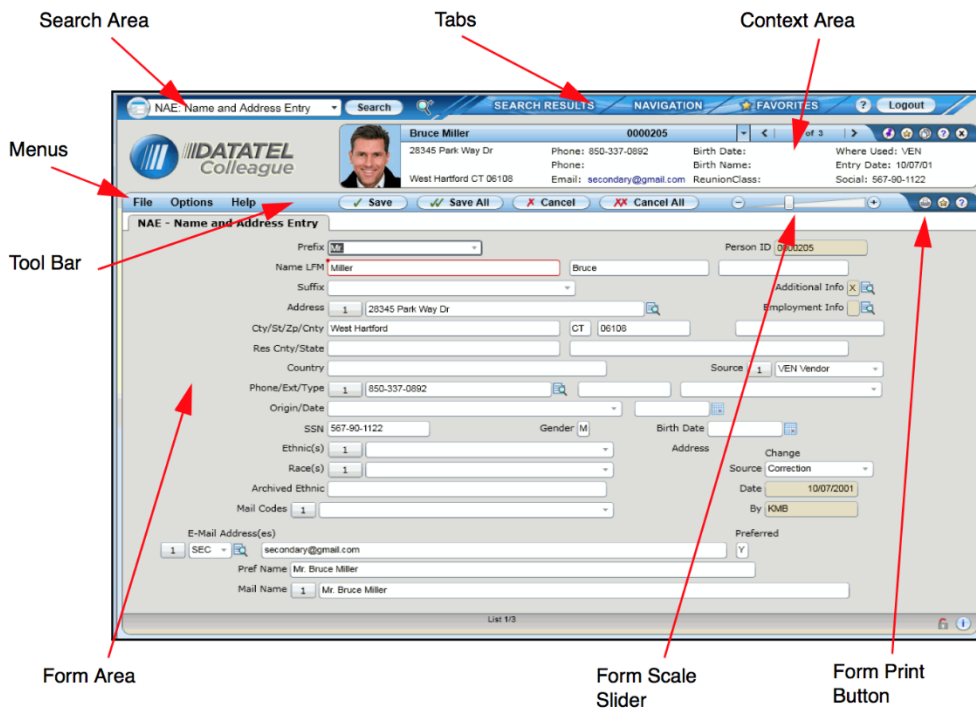
If after logging in you might notice that nothing happens, your browser settings are likely blocking pop-up windows. Follow the instructions on the webpage (toward the bottom) to allow pop-ups in your browser. For your convenience the instructions are also shown below:

If Internet Explorer asks for Silverlight, please call x2712

3. A new window should pop up. Ignore the message. Click **OK**.



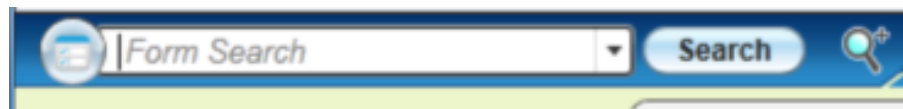
## Interface



## Search

- To begin looking up a person's records, go to the **Search Area**. (Notice that by clicking the round icon to the left you can switch between searching for forms or people)

Form Search (allows you to search for forms):



Person Search (allows you to search for people):



**Note:** Searching can be done multiple ways, depending on how much information you know about a person. Here are the preferred methods:

- 1.) SAU ID#
  - 2.) Social security number
  - 3.) Lastname, Firstname (“Smith, John” or “Smith, J” or “Sm, John”) Notice that we can also search for parts of the name
  - 4.) State, City, Country etc... (Used in the Advanced Search, the magnifying glass to the right of the Search button)
2. As an example, switch to **Person Search** and search for “**Johnson, Bri**” and hit enter or click search.
- When more than one record is returned for your search, a search results page will show up (as shown below).
3. You can also search for forms/processes by switching to form search typing their acronym. (NAE for example)

### Navigation Menu

1. Click on Navigation at the top, and select “ST” from the dropdown.
  - ST: Student Application
  - UT: Utility Application
  - HR: Human Resources
2. Select **Person Demographics > Name and Address Entry (NAE)**

Note: If you want to quickly navigate to forms in the future, you can type the abbreviation in the forms search bar (eg by typing NAE or FASI and others)
3. Type in your ID number in the **PersonLookup** box.

Notice how your record pops up in the context area.
4. Click **Cancel All** to close the form

### Context

1. In the **search bar**, search for **your name** (last, first).
2. Select your record.
3. Notice after selecting a record, your information will appear at the top.
4. This is called the “**Context Area**”
5. Search for “Smith, A” and select a record.
6. This will add another person to the context, and thus enabling you to work on the same form for 2+ people.

**Important: Do not leave records open, accessing a record will lock it for others. This means that no one else can work on that form. So before leaving for lunch, or a long period of time, please close the form.**

# Forms

## Using Forms

1. In regards to the context, opening any form will open the records of the person (aka you)
2. In the search bar, switch to **form search** and type “NAE” and press Enter
3. This is the example of a form.
4. Form Field colors have a special meaning.

(The current fields should all be yellow, however your work specific forms may not – just note the colors)

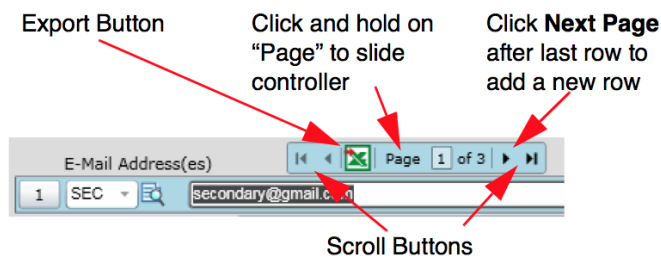
**White:** You can change their value

**Yellow:** Read-only, you cannot change their value.

**Red:** Required before you can save the form.

**Grey Shaded:** Inquiry only fields (such as SSNs and extremely sensitive data).

If a field has a number to the left, it indicates that this is a table that may contain multiple rows (such as an address), clicking anywhere in the field will pop-up a table navigation (as shown below):



## Subforms

1. To the far right of the form, click the magnifying glass next to “Additional Info”.

2. Select the sub-form “**BIO**” and click ok.

This is an example of a sub form. Click on Cancel to return to the main NAE form.

**Important:** When modifying a sub-form and you must also click save on the parent form for the record to be updated/Saved, otherwise your changes will be lost!

## Toolbar

1. There are ways to save or dispose of any changes you have made to a form.

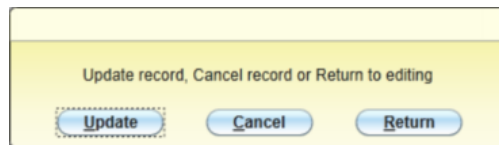


2. **Save** – Will pull up a prompt asking you if you are sure you want to save.

Update: Will update the form with the values you have entered

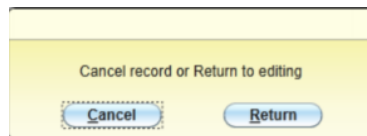
Cancel: Will cancel the form and any changes you have made.

Return: Will bring you back to the form, to make any changes you may have forgot (don't forget to save it as well).



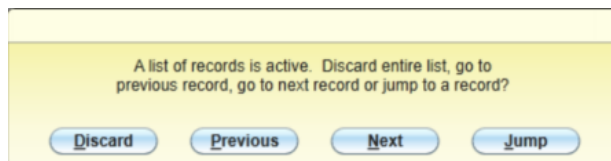
**Save All** – Will save all of the forms you have open (including the forms of another person in the context) with no prompt

**Cancel** – Will prompt you to discard all of the changes



**Cancel All** – Will cancel all the changes you have made (including those in another person in the context) with no prompt

**Note:** If there is more than one person in your context area, when you cancel/close a record you may get a pop-up asking you which record you would like to return to. Clicking Discard will simply return you to the form entrance page and clear the context area. Clicking previous will open up the previous person in the context area and clicking next will open up the next person in the context area. The dialog is shown below:



3. Cancel the form. Click Cancel again.

## Processes

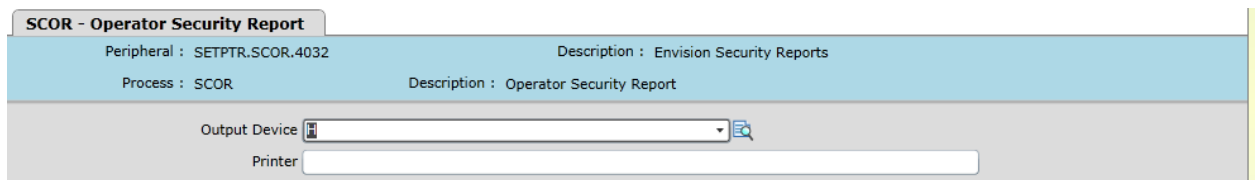
### Running a Process

1. In addition to forms, Datatel also has processes that can return reports. As an example, enter the mnemonic "SCOR" in the **form search bar**. SCOR stands for Operator Security Report.



2. Enter your username in the first row, click on Save All (no prompt should appear).

In the next screen, pay special attention to the "Output Device" field.



### Output Options

Note: Whichever option you choose, after clicking save and update, the next screen will ask if the job should be run in the background. Leave the "Execute in Background mode" set to N and click on save and update.

Warning: Please do not leave reports with SSN, credit cards and grades in your email account and do not leave sensitive information unattended at the printer.

- H (Hold/Browse File Output) – **this is the default**. It will display the report in your browser after it finishes running. (You will be able to save the report to PDF)
- P (Printer Spooler) will send the document to a printer of your choosing. In the printer field, type in ... (three dots) and hit enter, this will show you a list of printers and their mnemonics. Select the desired printer and continue with save-> update.
- E (Electronic Mail Delivery) will send you an email of the report. If this is specified, be sure to specify an email subject and email recipient on the sub-form that is displayed.

### ... Wildcard

- i. Select P (Printer Spooler) as the Output Device
- ii. In the printer, enter "..." (three dots). A list of printers should appear.

The three dots allow you to search for what values this field accepts (if it requires a specific value), the dots act like a wildcard.

- iii. Press “Esc” (top left corner of your keyboard).
- iv. Change the Output Device to H. And click “Save All”
- v. Click Save All again. Wait for the process to run.
- vi. Click Finish.
- vii. Processes/Reports in Datatel are text based. From this screen, you are able to export or print.
- viii. Click the “X” at the top right to exit the process.

## Logging Out

To log out from Datatel, press the “Logout” button at the top right of the screen.

Ensure that when you are done working with Datatel that you click the logout button on the top right side of the application window!

## Security

Report any possible information security issues by phone at ext# 2715

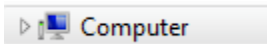
## Checklist

- ✓ Are you comfortable searching for people?
- ✓ Pulling up documents?
- ✓ Editing forms?
- ✓ Running processes?

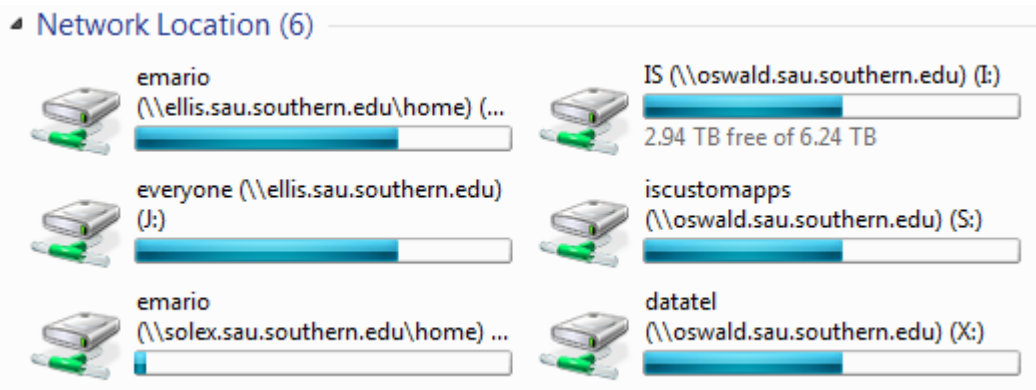
# Network Drives and Lync

## Network Drives

1. Open “My Computer,” click “Computer”



2. Notice the drives under “Network Location”



3. There are three drives you are going to use for work

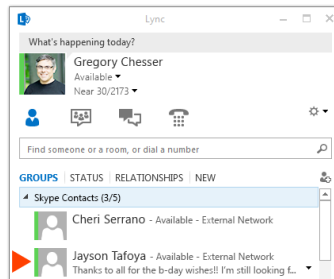
W: This is your personal drive. Store non-work related things here

I: This is department based, everyone in the department has access to it.

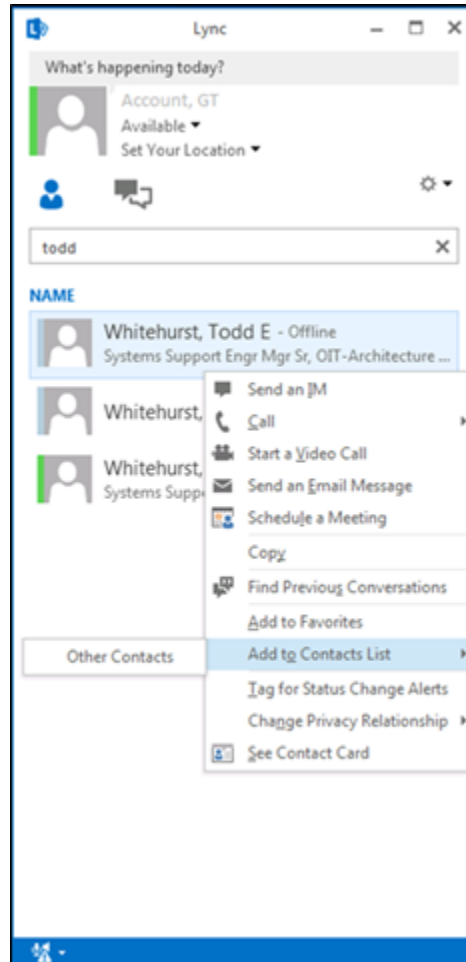
The benefits of this drive is the sharing capability, and that it is routinely backed up, so that documents can be recovered.

## Lync

1. Lync is used as an instant messaging service for Southern. Every employee has it. It is used for informal, quick communication.

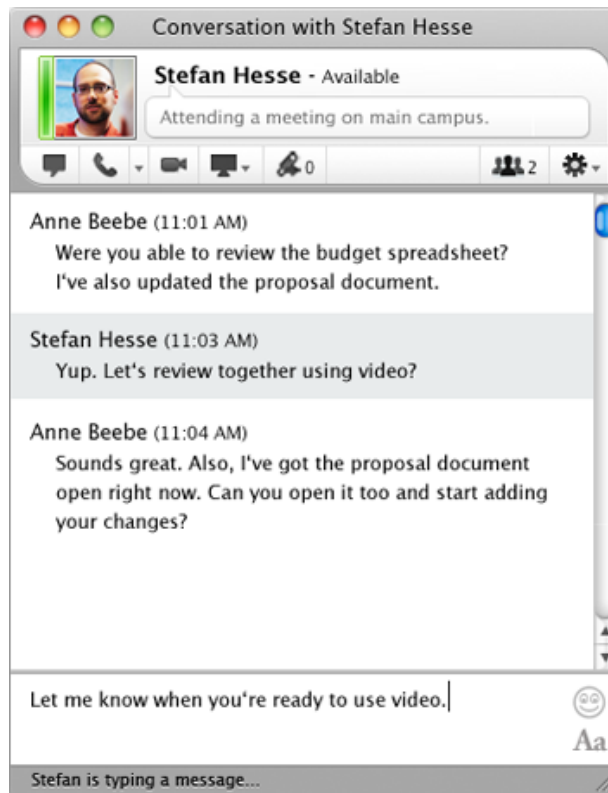


2. To add someone to your contact list (such as a supervisor, or frequent contact), type their name in the search box at the top. Right-click the person's name and select "Add to Contacts List" and pick an appropriate group.



3. To start an IM, just click the person's name, a box should pop up. Type whatever you wish to communicate and press "Enter." It should appear in the chat log.





End

Congratulations! You're done with Datatel Training. Please log off of the computer and you are welcome to return to your offices.