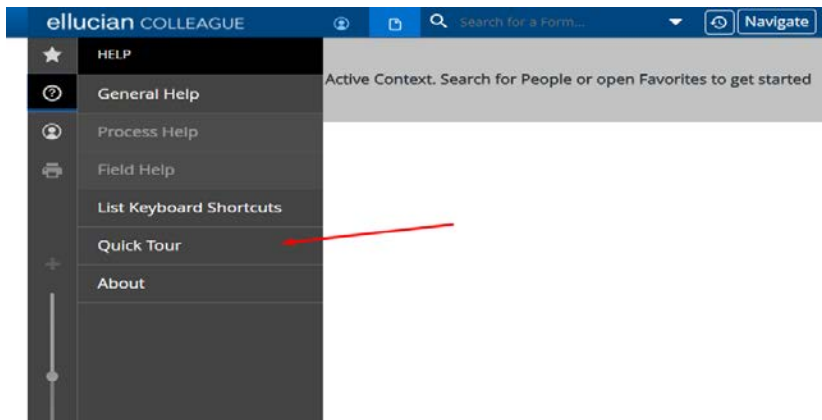
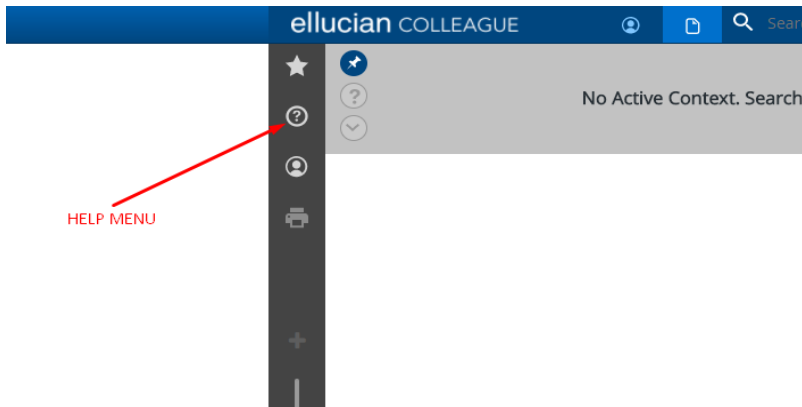


UI 5 WEB TIPS AND TRICKS

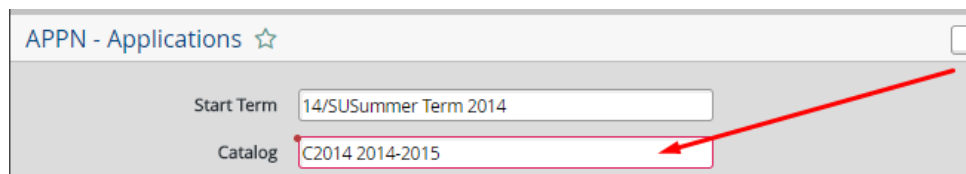
To get started, view the Quick Tour video (less than 8 minutes long) for an overview of UI 5 Web. This option appears the first time you log in to UI 5 Web.

If the Quick Tour doesn't appear automatically, select it from the Help menu.



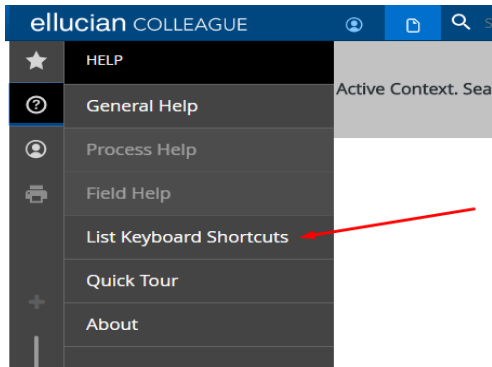
Following are helpful things to know when working in UI 5 Web:

- To delete the contents in a field, highlight the contents of the field, and then hold the <Ctrl><Alt>D keys down at the same time. For example, to delete the Catalog year, highlight "C2014 2014-2015", and then press the <Ctrl><Alt>D keys.

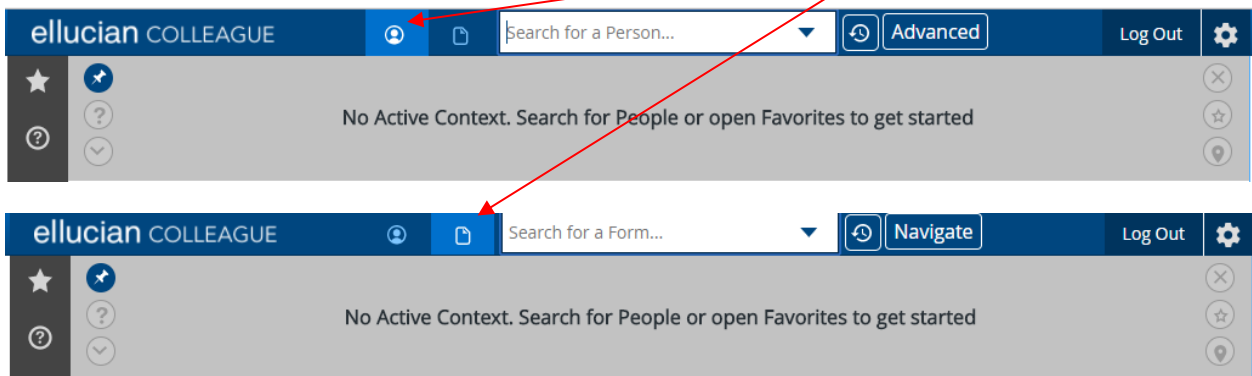


UI 5 WEB TIPS AND TRICKS

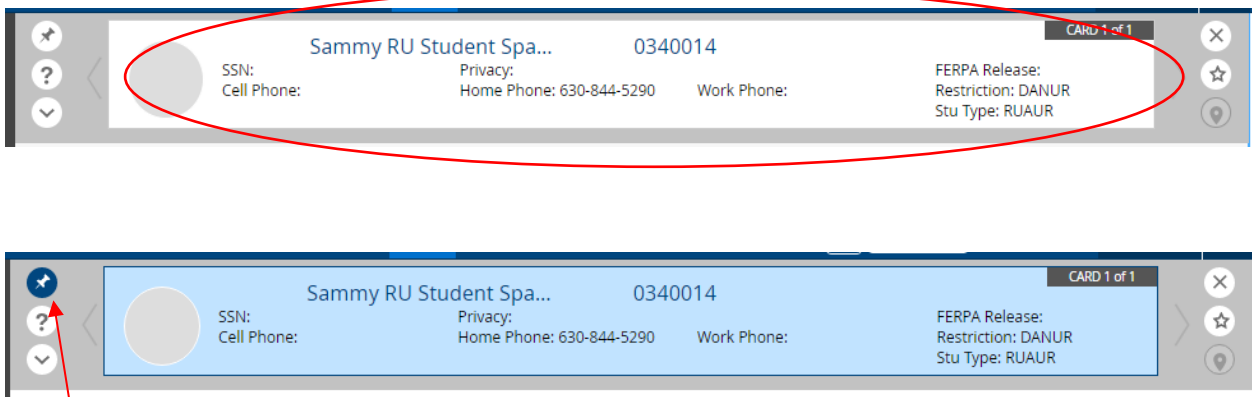
A complete list of keyboard shortcuts is available from the Help menu.



- Click on the tabs to switch between person search and form search.

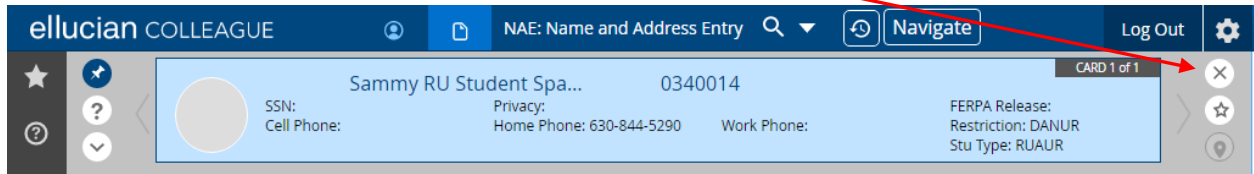


- By default, a person lookup will stay closed in the context area (circled). To change this default, click on the pin to the left of the context area and its color will change. You can switch between the two choices.

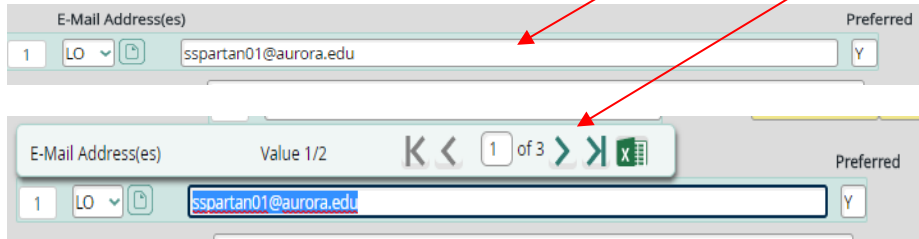


UI 5 WEB TIPS AND TRICKS

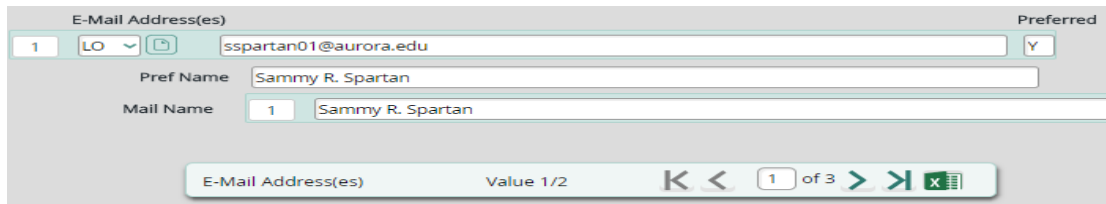
- To close the Active Context record, click on the X.



- To scroll through rows in a list, left-click inside one line of the rows and the scroll bar appears.



If the scroll bar is in your way, click on the bar, holding down the left mouse button, and drag it out of the way. You can move it to any place on the form.



The scroll bar has the option to export all of the rows to Excel. Click on the Excel icon which opens an Excel spreadsheet containing the contents of the rows in this list.



Following is an example of an Excel spreadsheet with the rows from the list above.

The screenshot shows an Excel spreadsheet with the following data:

| | A | B | C | D | E | F | G | H |
|---|----------|-----------------------|----------|--------|---------|-----------|--------|---------|
| 1 | Code | Description | Instance | Status | Stat Dt | Assgn Dt | Act Dt | Comment |
| 2 | FAC16PD2 | 16-17 Parent FAFSA IR | | | | 4/18/2016 | | |
| 3 | FAC16LRF | 16-17 Stafford Loan R | | | | 4/18/2016 | | |

UI 5 WEB TIPS AND TRICKS

- When performing a lookup, switch between Card View and Grid View to view the entries in a different format.

CARD VIEW:

ellucian COLLEAGUE NAE: Name and Address Entry

SEARCH RESULTS FOR : PERSON

| | | | |
|---|---|--|---|
| 1 | Samantha RG Student Spartan ID: 0954255 Birth Last: | 347 S Gladstone Ave Aurora, IL 60506 Where Used: MAI,PER,STU,FIN | SSN: Birth Date: Add Date: 10/13/15 |
| 2 | Sammy RU Student Spartan ID: 0340014 Birth Last: Tester | 347 S Gladstone Avenue Aurora, IL 60506-4892 Where Used: APP,MAI,PER,STU,FIN | SSN: Birth Date: Add Date: 09/13/99 |

GRID VIEW:

ellucian COLLEAGUE NAE: Name and Address Entry

SEARCH RESULTS FOR : PERSON

| # | Name | ID | Birth Last | Address Line | Address CSZ | Where Used |
|---|-----------------------------|---------|------------|------------------------|-----------------------|--------------|
| 1 | Samantha RG Student Spartan | 0954255 | | 347 S Gladstone Ave | Aurora, IL 60506 | MAI,PER,STU, |
| 2 | Sammy RU Student Spartan | 0340014 | Tester | 347 S Gladstone Avenue | Aurora, IL 60506-4892 | APP,MAI,PER, |
| 3 | Samuel Staff Spartan | 0927204 | | 347 S Gladstone Ave | Aurora, IL 60506 | FAC,MAI,STA, |

- To close a list of lookup results without selecting one, click on the **X** at the top right hand corner of the search results page.

SEARCH RESULTS FOR : PERSON

| | | | |
|---|---|--|---|
| 1 | Samantha RG Student Spartan ID: 0954255 Birth Last: | 347 S Gladstone Ave Aurora, IL 60506 Where Used: MAI,PER,STU,FIN | SSN: Birth Date: Add Date: 10/13/15 |
| 2 | Sammy RU Student Spartan ID: 0340014 Birth Last: Tester | 347 S Gladstone Avenue Aurora, IL 60506-4892 Where Used: APP,MAI,PER,STU,FIN | SSN: Birth Date: Add Date: 09/13/99 |

- Processes related to correspondence such as printing letters, sending email, or noting a document received from a student are called Communication Management processes. Many of these require you to enter "ST-" before the form name (e.g., ST-CRI, ST-DOC). This also may be required for other forms if they don't display when you enter only the form name.

ellucian COLLEAGUE

ST-CRI

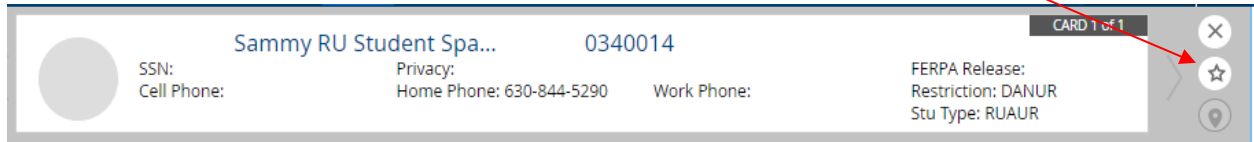
Sammy RU Student Spa... 0340014

SSN: Privacy:
Cell Phone: Home Phone: 630-844-5290 Work Phone:

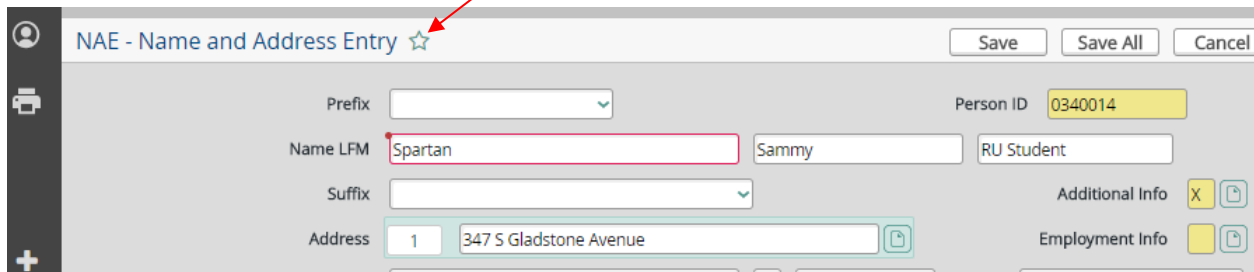
CRI - Communication Code Entry ☆ Save

UI 5 WEB TIPS AND TRICKS

- You can save a person to Favorites by clicking the star in the Context Area



- You can save a form to favorites by clicking the star on the UI Form Area



Click the Favorites tab to access your saved Favorites.

