UR Docs / Perceptive Content

FGSR Faculty Guide
URDocs (Perceptive Content)

Welcome to UR Docs, the system to digitize paper documents, store them centrally and reduce the need for paper copies and folders. Documents can be access through the application. UR Docs uses the Perceptive Content application to store all graduate student files and works in conjunction with Banner. The software has workflow capability which will be enabled in a future phase of the product at the graduate level. While graduate student files were somewhat electronic on our T drive this new software will allow future development of workflows and more efficient access and sharing of information.

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A. **Logging on/off**

**To logon:**

1) On the desktop or in the start menu, select the Perceptive Content icon.
2) The following dialogue box below will appear to login.
3) Enter your user name and password (these will be the same as your Novell login)
4) Once you have logged in the Perceptive Content tool bar will appear. Depending on your security will depend on the elements you see on your tool bar.

**To logout:**

1) Close the program using the X in the top right corner
   OR
2) Click the connect dropdown in the top bar and either click disconnect or exit.
3) Exit will close the program and log out.
4) Disconnect will log out but leave the application open.

**NOTE:** If you have trouble logging in, contact IT Support at 306-585-4685 or submit a FootPrints Ticket.

B. **Toolbar Elements**

1) Applications – Search for documents using Banner.
2) Documents – Search and view for documents filed away.
3) Workflow – Manage Workflow Queues.
4) Capture – Import a file into a Workflow (Only FGSR will have Capture access at this time).
5) Help – Access help guides for Perceptive Content.
C. **Terminology**
   1) Refer to UR Docs/Content Manual | March 2019
      (https://www.uregina.ca/is/training/manuals/u-of-r-software.html)

D. **Searching Documents**
   2) From the Main Toolbar, click on the Documents button.
   3) This will bring up the main Explorer Box

   ![Perceptive Content Explorer](image)

   3) Along the Left hand side you will see the Views. This is a list of the different drawers/Workflows that you have access to. The views you see will vary on your access.
   4) If you click the “+” sign next to the Department view you have access to you will see a the following filters that were modeled from the T drive and will allow you to search a student within these filters:
      i. Accepted not Registered - includes ENR (accepted not registered) & ENRC (accepted not registered conditional) student documents
      ii. Applications - includes applications for review and incomplete applications
      iii. Awarded - students who have received their degree (we will not be moving old completed files into the system at this time)
      iv. Current - includes: current students, students on a leave of absence (LOA), and students whom have applied to graduate
      v. Inactive – includes students who have left the program, been not accepted, declined an offer, or been required to discontinue (RTD)
   5) You can also use the quick search function available by clicking on the department heading. Here you can search by Student ID, or Name (Last or First).
6) This will bring up the students application form. You can double click this document to open it.

E. Viewing All Documents

All documents for a student are attached to the student’s application. To view the documents:

1) Double click to open the application.
2) Click the View menu, then select “Related Documents”.
3) From the Relationship drop down menu select “Dept GS View Only”. This relationship will bring up all available FGSR documents for the student.

4) If you want this view to be the default, click the gear button above the Relationship drop down menu.
5) Check “Remember and run the last viewed relationship” box and close.
F. **Accessing Documents for Admissions**

There are some of you that require the ability to move admissions related documents easily to a separate location for committee review, etc. In the related view listed above you would not be able to pull out a group of documents so we have designed an additional “GS DEPT Admission Docs” view that will allow you to move out all admissions documents for one student as one PDF.

There are two ways to do this:

**Using student Search:**

1) Using the “Student ID” filter. Type in the student number you are looking for and it will bring up all admissions documents for that student.
2) To export the application and related documents for a student simply hold the “ctrl” button and select the required documents.
3) Once all documents are selected right click and chose “print”. You would then select the printer as Adobe PDF.
4) A save as box will appear. Select the location you want the file saved and name it according to your conventions so that reviewers can easily identify it.
5) This will have exported all the required documents as from URDocs to one file in your desired location.

**Using the Admissions Doc full view:**

1) Select the Admissions Docs view and hit “go”

2) This will bring up a listing of every application in the status of Incomplete or Apps for Review as well as every admission document that goes with that application.
3) Follow step 2-5 above.

**NOTE:** Remember to confidentially discard copies of documents after your unit is done with them.