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SECTION 1 
NAVIGATION

A. Background
UR Docs is the imaging system used to digitize paper documents, to store documents centrally and reduce the need for paper copies and folders. Documents can be accessed online making them more accessible. UR Docs uses the online NolijWeb application, which has workflows set up to enable different areas to work on documents and pass them on to the next stage. Users will ALWAYS CONTINUE to use Banner alongside UR Docs. Think of this application as your paper folder filled with the student’s documents that get passed from desk to desk, dept to dept.

B. Logging In
To access URDocs:
1. Open FireFox or Internet Explorer (Firefox is recommended as some of the URDocs functionality does not work in Internet Explorer)
2. Access the UR Docs webpage: https://urdocs.uregina.ca/NolijWeb OR
   a. Access the main U of R page at http://www.uregina.ca
   b. Click ‘Faculty and Staff’ at the bottom of the page
   c. On the ‘Quicklinks Navigation’ menu choose ‘UR Docs’
3. Enter your Novell Username and Password (same as GroupWise)
4. Click Login
C. Logging Out

1. Click both of the ‘Red Minus’ icons to clear the search query fields. This closes the students’ folder.
2. Click ‘Logout’ button at top right of screen.

D. Nolij Online Users Guide

1. Click down arrow at top left of the screen
2. Click ‘Open User’s Guide’

E. Customize Themes

1. Click at the top menu bar
2. Hold your mouse over ‘Themes’
3. Select a theme. Some themes provide better contrast and larger font.

F. Selecting your Role

Some users will have more than one ‘Role’ in UR Docs. For example, you may need to act as a Coordinator, an Assessor or a Viewer.

1. View your current role at the top right of the screen (next to the ‘Logout’ button).
2. Click the down arrow, to select a different role (i.e. Coordinator or Assessor).

G. Communication Window

1. Click at the top menu bar
2. Click ‘Communication’
3. Console Tab: Important system messages
4. Collaboration Tab: You can communicate with other users who have permission to use the Collaboration Tool. To collaborate with other users:
   a. Double-click the user with whom you want to communicate, type the message in the dialogue box and click send. Offline users appear in italic.
   b. You can send messages to offline users. An offline user receives the message the next time he or she logs in. The message you send contains the time and date you sent it.

Note: Collaboration is currently disabled within UR Docs at this time.

Note: You cannot see messages sent to you unless you are logged in using the role to which messages were sent. **ALL** messages are permanently stored in history.
H. **Workflow Elements**

The UR Docs workflow pane contains the inboxes that contain the folders with which you can perform work. This pane also contains fields in which you perform a query.

1. **Workflow Toolbar**: Contains the name of the UR Docs workflow in which you are working. Also contains buttons to allow you to view the graphical workflow and to clear query fields.
2. **Query Fields**: Fields you can use to search for records of information.
3. **Inboxes**: Inboxes that you own, which contain student folders.
4. **Clear Query Fields**: Clears the search fields and student information.
5. **Query Results Pane**: Contains UR Docs query results. Click to collapse the results; click to expand the results. This pane is displayed for UR Docs workflows only; it does not appear for ImageNow views or workflows.
6. **Clear Results**: Clears unlocked query results
7. **Folder Objects Pane**: Displays the objects contained in a UR Docs query folder. Its contents are displayed after you click the folder in the Query Results Pane. You can do the following:
   a. View documents in a query folder
   b. Index documents
   c. Delete and rename documents
   d. Email documents
   e. Search documents for specified text
   f. Add template documents
   g. View and configure document properties
SECTION 2
SEARCHING AND VIEWING DOCUMENTS

A. Searching and Viewing a Document

Note: ‘Student Query Workflow’ allows any user to easily view documents for any student as required.

To search for a student:

1. Click Workflow/View at top left.
2. Choose ‘Student Query Workflow’ (or other applicable workflow options).
3. Enter search criteria in one or more fields (ie: Last name or Student ID#).

Note: The query works like Banner where you can use ‘%’ wildcards for partial names or spellings.

Example: You may not know if the applicant, Joe Smith, used the name Joseph, Joey or Joe as the name on the application. To query this record, type Smith in the Last Name field and J% in the first name field.

4. Press ‘Enter’.
5. Click the student folder in the list of results, the student name will be highlighted in blue and the information will appear at the top with the ID#, name, DOB, home province and visa type.
6. Files attached to the student record will show in a list on the right in the Folder Objects Pane.
7. Click a file to view it in the Document Viewer Pane.
To view another student:
1. Click icon at the top to ‘Clear query fields’
2. Enter new search criteria
3. Press ‘Enter’ to display a new query results list

To view another student without clearing the previous results:
1. Click ‘Tools’ drop down in Query Results Pane, uncheck
2. Search for another student
3. Another query results list will appear

To clear search when finished:
1. Click to clear the current list of query results
2. Click to clear the search query fields

Note: It is important to clear the search when you are done to ensure you do not lock a folder and prevent another user from viewing it. Every 60 minutes UR Docs will refresh and the student folder will be unlocked.

B. Filter Documents

To filter by specific text in a document – (the OCR feature that is required to filter documents by specific text is not enabled in UR Docs):
1. Click in right top corner of file list
2. Hold your mouse over ‘Filter On’
3. Click ‘Document text’
4. Click the search bar and enter the text to search for
5. Press ‘Enter’
6. Documents with that text in them will be shown
7. To return to the list of all files, remove the search text and press ‘Enter’

Note: The yellow triangle icon on a file indicates the system recognizes less than 85% of the words

To filter by Index Type:
1. Click in right top corner of file list
2. Hold your mouse over ‘Filter On’
3. Click ‘Index Type’
4. Click the search bar and enter the Index Type to search for and press ‘Enter’
5. Documents with that Index Type will be shown
6. To return to the list of all files, click the ‘X’ next to the search bar

To filter by Custom Properties:
1. Click in right top corner of file list
2. Hold your mouse over ‘Filter On’
3. Hold your mouse over ‘Custom Properties’
4. Click ‘Description’ or ‘Term’
5. Click the search bar and enter the text to search for
6. Press ‘Enter’
7. Documents with that criteria will be shown
8. To return to the list of all files, click the ‘X’ next to the search bar
C. **Document Viewer**

The document viewer toolbar (located at the top of the document pane) provides users with several options to adjust the document images so they can be more easily viewed. The available options are set based on assigned user roles and will vary depending upon the role being used. The following is a brief description of the functionality:

1. ![Save](image)
2. ![Print](image) (will include all annotations on the document even if temporarily hidden)
3. ![Number of Pages](image) – Displays current page/total number of document pages
4. ![Annotation Tools](image)
5. ![Zoom In](image)
6. ![Zoom Out](image)
7. ![Fit Width](image) – Displays using full screen width
8. ![Fit Height](image) – Displays using full screen height
9. ![Click ‘Maximize’ icon to view document on full screen](image)
10. ![Click again to ‘Restore’ to return to half screen view](image)
11. ![Extract Page(s)](image)
SECTION 3
IMPORTING ELECTRONIC DOCUMENTS

A. Import a File
1. Save the electronic file on your computer
2. Search for the student you need to add a file to
3. Click the student to activate the list of files associated with that student
4. Click the 'File Explorer' folder icon at bottom
5. Click the folder in the left column that corresponds to the folder on your computer where the file is stored
6. Click and Drag the file up to the student file list until you see and drop the file
7. Single-click the file to view in the document viewer on the right
B. **Index the File**

Indexing specifies a document type to the system.

To Index a file:

1. Right-click the file to specify the index type
2. The menu will list the last 10 recently used index types, select one or click **More Index Types...**
3. Double click the appropriate index type from the pop-up list
4. To index to a sub-folder, drag the document over the sub-folder tab, or right-click and choose from the sub-folder menu

**Note:** A properly indexed file will show a blue bar on the icon and will be renamed with the index type. A document that is not properly indexed will not have a blue bar and will show the file extension (ie: .pdf).
SECTION 4
FILE MANAGEMENT

A. Specify File Information
This function is used to add details to file information. For example, specify the file information to add the Institution a transcript is from.

1. Right-click the file and choose ‘Custom Properties’
2. Enter the information in the ‘Description’ field as required (i.e. U of S)
3. Enter the ‘Term’ field (i.e. 201530)
4. Click ‘OK’

<table>
<thead>
<tr>
<th>Name</th>
<th>Created</th>
<th>Size</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>APP - Application</td>
<td>2013 Oct 4 13:0</td>
<td>593 K</td>
<td>UofS</td>
</tr>
<tr>
<td>CTR1 - Final College Transcript</td>
<td>2013 Oct 4 13:0</td>
<td>784 K</td>
<td>UofS</td>
</tr>
</tbody>
</table>

Note: When searching by Custom Properties, the search is CASE SENSITIVE. We recommend choosing a naming convention.

B. Have an Index Type Show on Shortcut List
To add an index type to your shortcut list:
1. Right-click a file and choose ‘More Index Types’
2. Right-click the index type and choose ‘Lock’, a lock will appear in front of the index type
3. Right-click again to unlock and remove it from the shortcut list
4. When you right-click to index a file, your favorites will appear without having to click ‘More Index Types’

To remove an index type from your shortcut list:
1. Right-click a file and choose ‘More index types...’
2. Right-click the index type you want to remove from your list and choose ‘Unlock’
3. Click ‘OK’

C. Remove a File
1. Right-click and choose ‘Delete’
2. Confirmation message will appear - ‘Are you sure you want to delete this file’
3. Click ‘Yes’

D. Recover a File Deleted in Error
1. Right-click the student folder and choose ‘Document Recovery’
2. A list will be displayed of all documents deleted from that folder
3. Click the file you want to restore then click ‘Recover Document’

Note: This will show all files deleted from that folder by any user, not just files you deleted. These files will never be permanently removed.
E. **Make a Copy of an Existing Document**

1. Right-click the file
2. Choose *Duplicate*
3. A duplicate will be created and named “Copy of...”
4. Files can be renamed and attached to another student

F. **Moving a File From One Student to Another**

To move a file from one student to another, you must have both student folders queried.

1. Search for a student
2. Right-Click the query name and choose ‘lock’ query results
3. Click to clear the top search criteria
4. Search for another student
5. Query results will show below the locked query results
6. Drag & drop a file from one student folder to the other student folder

**Note:** Click *Tools* drop down to turn on or off “Clear all results before each query”

G. **Customize Columns Shown in List of Files**

1. Click the drop-down arrow next to *Name* and choose *Columns*

![Columns](image)

2. Check the columns you would like to have visible
   AND/OR
   Uncheck the columns you do not want visible
3. Click anywhere on the page to close the column choices
4. Click a column heading to sort documents by that column, you cannot change the displayed order of columns
H. Merge Documents

Useful if the scanner creates separate documents for each page of a document OR if a student comes along with a missing page, it can be scanned and then merged into the document it belongs with. The merged document has the same properties as the first document selected to be merged such as name and index type. Pages are added to the merged document according to the order in which the individual documents are selected.

1. In the Folder Objects Pane, select the documents you wish to merge. To select multiple documents:
   - if you click one document, press and hold the **SHIFT** key, then click the last document they will be merged in the order showing
   - if you click one document, press and hold the **CTRL** key, then click the others individually, they will be merged in the order you selected them
2. Right-click a selected document and choose ‘Merge Selected’

**Note:** You can only merge documents of same file types (ie: only .tiff merges with .tiff, only .pdf merges with .pdf) If you try to merge different document types, it won’t have “Merge Selected” as an option when you right-click.

I. Separate/Extract Documents

Useful if the scanner creates one big document, but really several documents were scanned together and need to be separated.

**To extract a document:**

1. In the Document Viewer, navigate to the page of the document you want to extract
2. In the Document View Toolbar, click 📄 and choose ‘Extract current page’
   a. Click ‘Yes’ to Delete Page from original main document
   OR
   b. Click ‘No’ to Copy Page and also leave it in original document. This is useful if you need to keep the original as a guide to reorganize.
3. New document(s) shows up (ie: Page 4 of SAT)

**To extract all document:**

1. To Extract ALL pages click 📄 and chose ‘Extract All Pages’
2. Creates a separate file for each page while the original remains intact
3. The file(s) may need to be merged with another document or renamed
J. Annotations

Your user role determines if you can annotate and redact documents. You can annotate a document in a number of ways, such as highlighting information, added text and inserting sticky notes.

To Add Annotations:

1. Click in document viewer panel and choose the function you want to use.
   - Highlight
   - Circle
   - Redaction
   - Free Text – You can see through this text
   - Line
   - Square
   - Sticky Note – Solid background. Cannot see through text.
2. Click to save the annotations, otherwise they will be lost

Note: You can change the font size, color and background color by right-clicking the annotation. The annotation size, font size, background color you use are saved as preferences for that annotation type. The next time you add annotations of a particular type, these preferences are applied.

To Delete Annotations:

1. Right-click the annotation and choose ‘Delete Annotation’

To Hide Annotations:

Note: People with access to create annotations can choose the ‘Hide’ option to temporarily view the document without the annotations. Printing will still include the annotations.

1. Right-click the document and choose ‘Annotation Tools’
2. Click ‘Hide’

Note: If you do not have access to add a redaction and you hide annotations the redaction will still appear due to security reasons.

K. Locked Folders

If another user is currently using a folder, it will be shown as locked. You may still add a document to that folder but cannot make changes or annotations to any document.

- Click to see if another user has added a file to a folder while you were using it
- Always click to clear your search and release the folder
- After one hour of inactivity, UR Docs will time out and the folder will close and be released
Batch folders are used to store documents that are not associated with any particular record. Documents that are scanned into UR Docs, but are not attached to a student record will go into a batch. They will be used for temporary storage of documents for students that are not yet set up in Banner.

A. Working with Batch Folders

1. To open a batch folder, use [Domestic Batch Query] and select a batch
2. To create a new batch folder, [Domestic Batch Query] Type new folder name and press enter
3. Favorites – You can set a batch folder to be a favorite by right-clicking and choosing ‘Add to Favorites’

Note: A folder cannot be deleted if there are files in it. To delete an empty batch, right-click and choose ‘Delete Batch Folder’.

B. Import Files into a Batch – from Network Scanner

1. If the scanner is in sleep mode press the big green button to activate the scanner
2. Place documents in the document feeder face up OR lift the lid and place on glass face down
3. Press ‘Save to Network Folder’

4. Select appropriate choice under ‘Quicksets’ on the left. (I.e. DA1-Greyscale)
5. The folder path will fill in and file type of PDF will default
6. The file name will default to match your selection
OR
To automatically have the scanned file attached to a specific student record:
   a. Click the default filename at bottom right
   b. Backspace to remove it
   c. Enter valid 9-digit Student ID # as filename
   d. Press ‘OK’

7. Press the big green button to scan
8. If you are using the glass scan-bed, the scanner will prompt for you to scan each page
   a. Put the next page on the glass and press ‘Scan’
   b. When complete, press ‘Finish’
9. The file will be scanned and imported in to UR Docs
   a. Status will show: Scanning... Preparing Job.... Sending... Success.
   b. Press ‘OK’ to return to menu screen
10. An email will be sent to the generic department email to confirm success or failure of the scan
    Admissions@uregina.ca OR Registration.Office@uregina.ca OR international.admissions@uregina.ca

Note: If you named the file with a Student ID, the file will be automatically attached to the student record in UR Docs. If you left the default file name, you will need to locate the file in the UR Docs Batch Folder named for the scanner that you used (ie: Admissions scanner 2 or RO Scanner 1) and then index the file to the appropriate student.

C. Import Files Into a Batch – From Computer
1. Save the electronic files on your computer
2. Click and choose a ‘Batch Workflow’
3. Use the drop down box to select a batch folder
4. Click at bottom centre
5. Navigate the folders in the left column that corresponds to the folder on your computer where the file is stored
6. CTRL + Click to select the files on the right column
7. Click and Drag the files up to the batch folder list

D. Attach Files From Batch Folder to a Student Record

Note: If you scanned documents and named them with the student ID number, they will already be attached to the student record. Proceed to the next step.
1. Click and choose a Student Workflow
2. While the student workflow is open, click and choose a Batch Workflow to open a second pane
3. Search for the student you need to add the file to and click their student folder
4. Open a batch folder and select a batch, then click the batch folder
5. Click and drag the file(s) from the batch above, down to the student below
E. **Index the File**

1. Click the Workflow/View drop down and choose the workflow
2. Search for the student and click on their folder
3. Right-click the file to specify the index type
4. Click **More Index Types**
5. Double click the appropriate index type from the pop-up list

**Note:** A properly indexed file will show a blue bar on the icon and be renamed with the index type

A document that is not properly indexed will not have a blue bar and will also still show the file extension (i.e. .pdf)
SECTION 6
FORMS AND WORKFLOWS

Forms are a way to pull related information from Banner to view on screen while working in UR Docs. These forms are custom built for the type of role being performed. Workflows in UR Docs are designed to replicate the flow of folders throughout the office. UR Docs is a virtual version of workflow and each step is called an ‘Inbox’. One or more users can have access to a particular inbox based on the work that needs to be completed at that step of the workflow.

A. Viewing Forms

1. Click the Form icon at bottom of document viewer
2. Use the drop-down to choose a form to view
3. Click to make detach the form and open in a separate window
4. If applicable, enter ‘Comments’ at the bottom and click at the top right to save
B. Workflows

Workflows can be MANUAL (User chooses where to move the folder) or AUTOMATED (System moves folder based on dept policies). As a document moves through the workflow and different people complete their part, a workflow folder history is maintained. The Workflow Bar shows where a folder is in the workflow and each step is called an 'Inbox'. When you have access to an 'Inbox' you have ownership and are responsible for that step. The Workflow replaces the paper folder with paper copies of documents being passed around or sent through interoffice mail.

Note: Each user will see different Inboxes, based on the role they are in.

To View an 'Inbox':

1. Click Workflow/View, choose the workflow you need to work on
2. Click on an inbox
3. Student folders that need attention will be shown
To Complete a Step in an Automatic Workflow:

1. Right-click a student folder in the Inbox and choose ‘Open’

2. View the files and add information as required. Complete your part of the workflow.

3. Click the green ‘Work Complete Checkmark’ on the toolbar above the student folder

To Complete a Step in a Manual Workflow:

On occasion you may need to manually move a folder to another area, instead of where the automated workflow would send it.

1. Right-click a student folder in the Inbox and choose ‘Open’

2. View the files and add information as required. Complete your part of the workflow.

3. Right-Click the student folder and click ‘Move to…’

4. Select the appropriate choice
To Color Code by Priority:
1. Right-Click and choose ‘Custom Status’
2. Select ‘High’, ‘Medium’ or ‘Low’ priority

To view Folder History:
1. Right-click the student folder and click ‘History’

To remove a folder from Workflow:
1. Right-click the student folder and click ‘Remove from Workflow’

Note: Only select users will have this option. i.e: May be used if a student drops out of the Admissions process

C. Admissions Workflow

An example of the steps in the workflow which have been coded into UR Docs as an automated workflow can be seen in Appendix A.

Note: Inboxes and Forms that show up will vary based on your role.

EXAMPLE for Coordinator Role:

To view a current petition for admission and update decision:
1. Open the appropriate workflow
2. Click the appropriate Inbox (i.e. Petition-Arts)
3. Click and select the student folder you wish to work with
4. View the form on the right
5. Click detach to open the form
6. Click the Decision down-arrow to select the Decision code (i.e. Accept with conditions)
7. Add initials to ‘Approved by’
8. Enter ‘Date’
9. Add your comments
10. Click the ‘Save’ icon at top right corner when complete
11. Click the green ‘Work Complete Checkmark’
12. If UR Docs says ‘Routing to petition compiler’, then you have completed your section correctly. If it says ‘Routing to’ then you did not ‘Save’ first
APPENDIX I

Domestic Admissions Workflow