

## Exporting Documents From Content

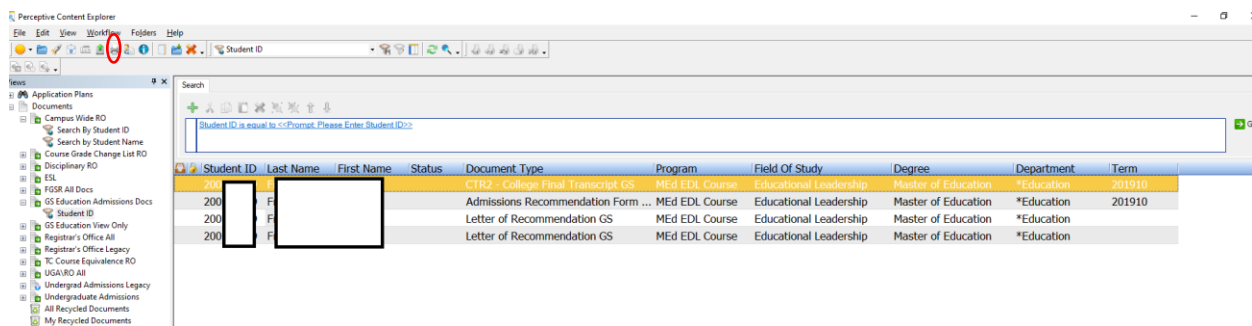
### Procedures for Exporting Documents

These procedures have been drafted to provide the users within the Faculty Units with the most efficient temporary solution to export documents out of URDocs. Please note that the current project will be working on longer term solutions to eliminate the need for exporting documents out of URDocs.

If the user requires the ability to combine multiple documents to one PDF document, the desktop version must be used (not the online version of Perceptive Experience). Two options are available and documented below however it is recommended Option 1 is used as it results in smaller file sizes.

#### Option 1 – Print to PDF

**1A** - In the view named 'GS Admissions Docs' enter the student id that you want to download all admissions documents for. This will display all admissions related documents for that student.

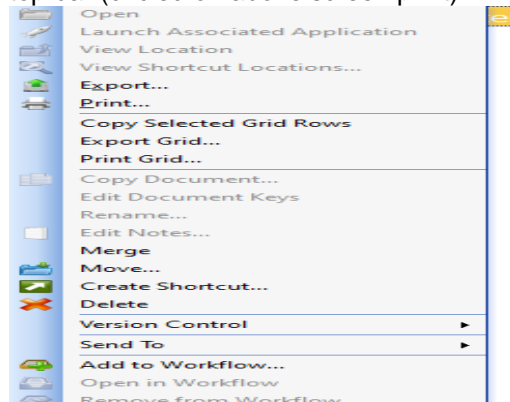


**1B** - If you would like to display a different order of the documents on the screen, you can sort by any of the columns available

Highlight all the documents you would like to export to one PDF

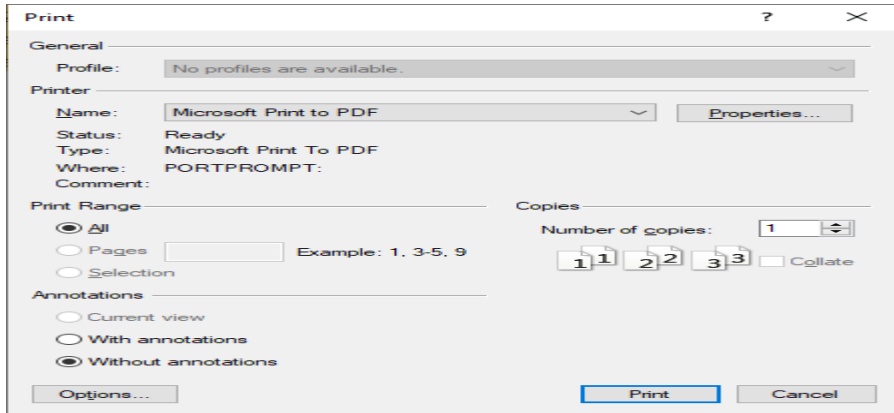
- If you want all documents, click the first one, hold shift and the last one and it will highlight all of them
- If you only want some of the documents, click the first one, hold ctrl and click the next one

**1C** - Right click and the following screen will appear. **Note:** Alternatively you can use the print icon at the top bar (circled on above screen print)

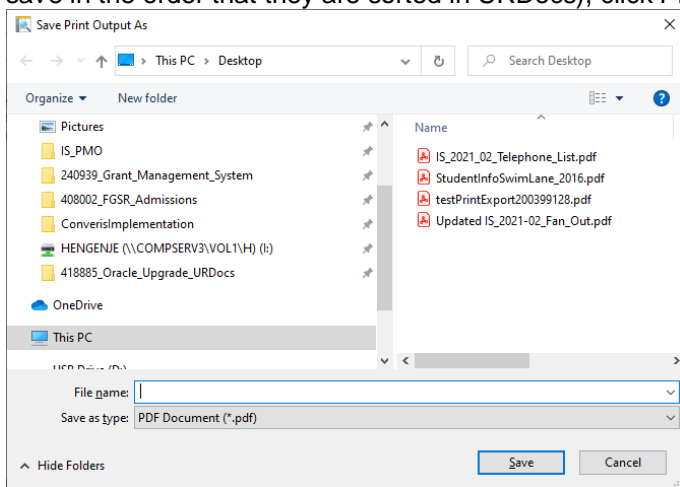


Click 'Print' and the following screen should appear. Ensure that the printer selected is 'Microsoft Print to PDF' or equivalent.

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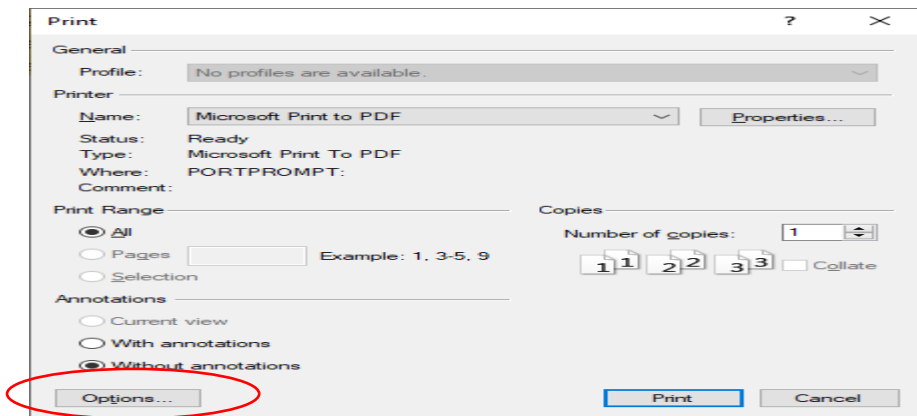


If you do NOT need to change the order of how the documents are saved to the PDF (the documents will save in the order that they are sorted in URDocs), click Print and the following screen will appear



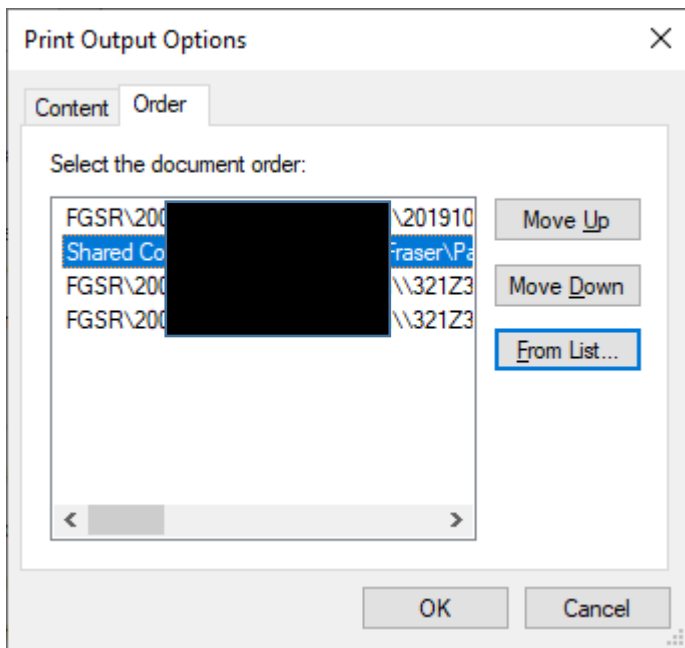
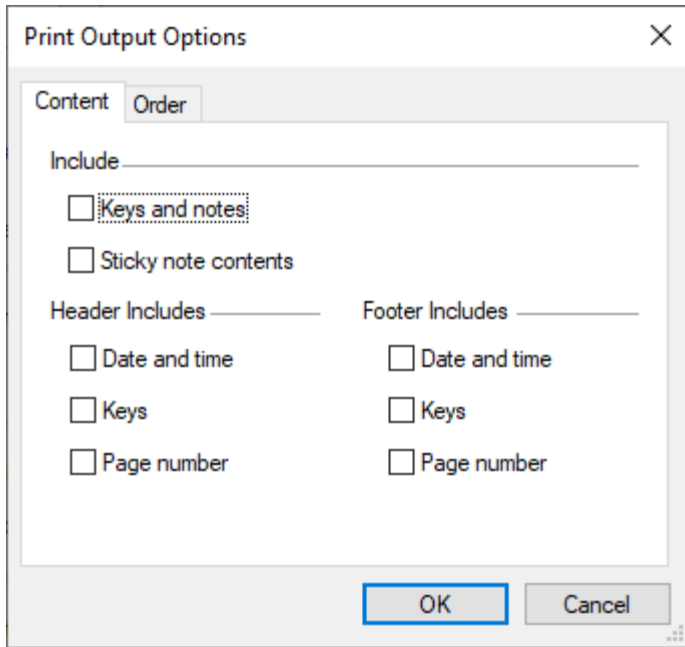
Choose a location and filename for your PDF document and click Save. Resulting is one PDF file in the location you specified.

If you do need to change the order of how the documents are saved to the PDF (the documents will save in the order that they are sorted in URDocs), click options on the screen below



The following screen will appear, then on click the 'order' tab

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From the screen above, you are able to move document up or down as desired to select the document order. In order to view all the details of the documents, you may have to make the box bigger by expanding it.

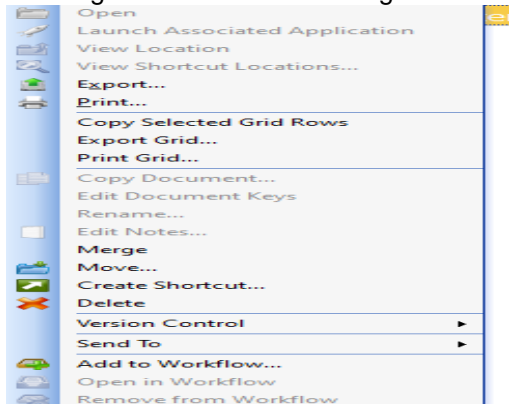
Then follow the same procedures as above to produce the pdf.

### Option 2 – Export to PDF

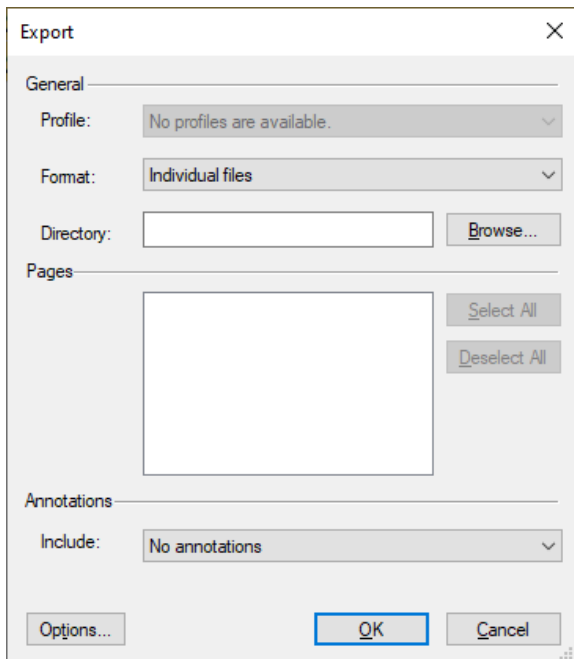
Follow the same steps 1A & 1B, above

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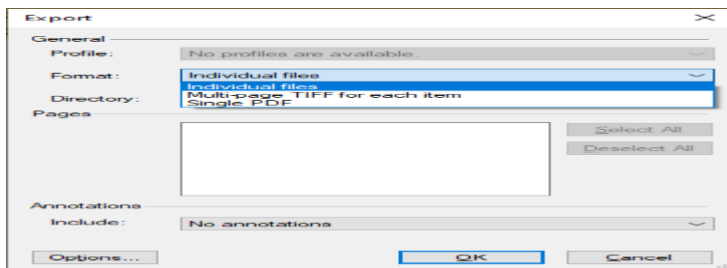
2C - Right click and the following screen will appear.



2D - Click 'Export' and the following screen should appear



If you do NOT need to change the order of how the documents are saved to the PDF (the documents will save in the order that they are sorted in URDocs), click Format and select 'Single PDF'

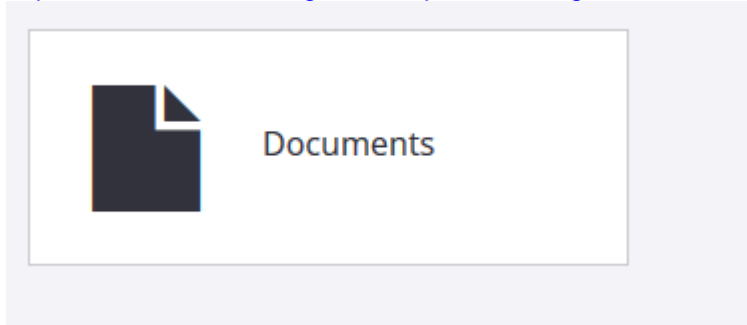


Then select a location using the 'browse', click OK Resulting is one PDF file in the location you specified. This may take a few minutes to process depending on how many pages you are exporting.

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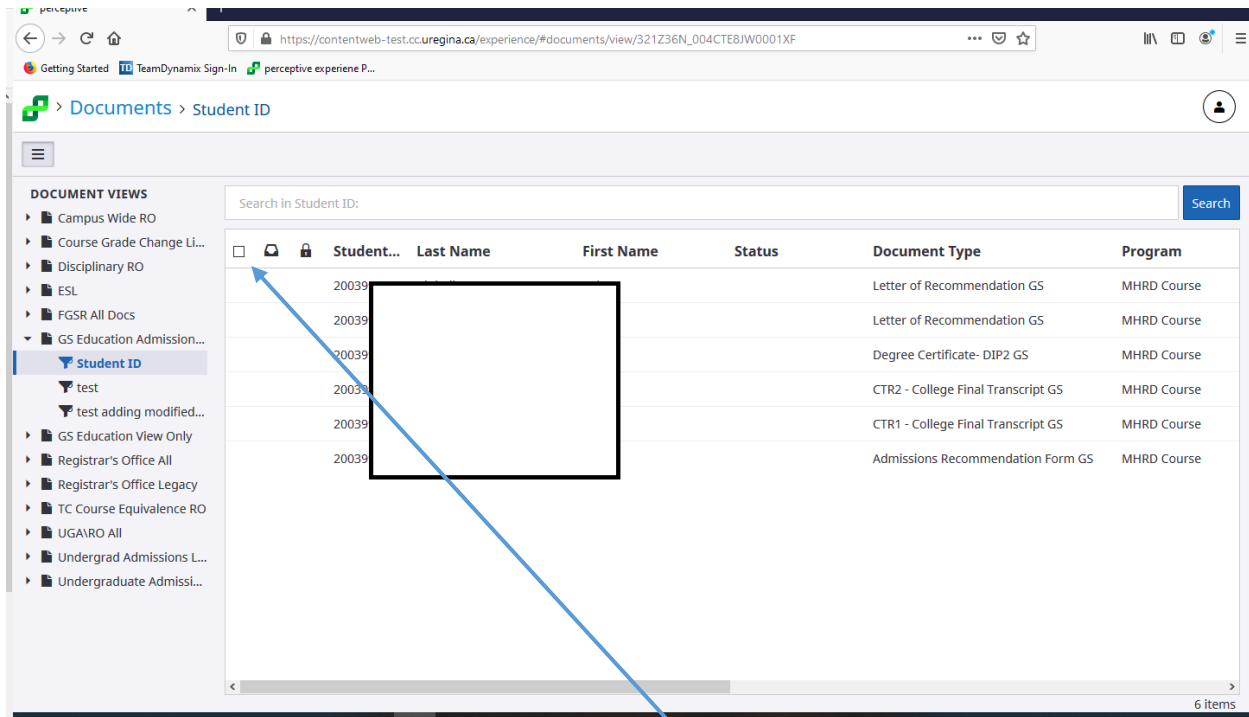
If the user does not require the ability to combine multiple documents to one PDF document, the online version of (Perceptive Experience) should be used as opposed to the desktop version. The reason behind this is because documents exported out of Experience will produce the smallest size outputs.

Login to the online version of URDocs (Perceptive Experience) using <https://contentweb.cc.uregina.ca/experience/#login>



Click Documents Icon

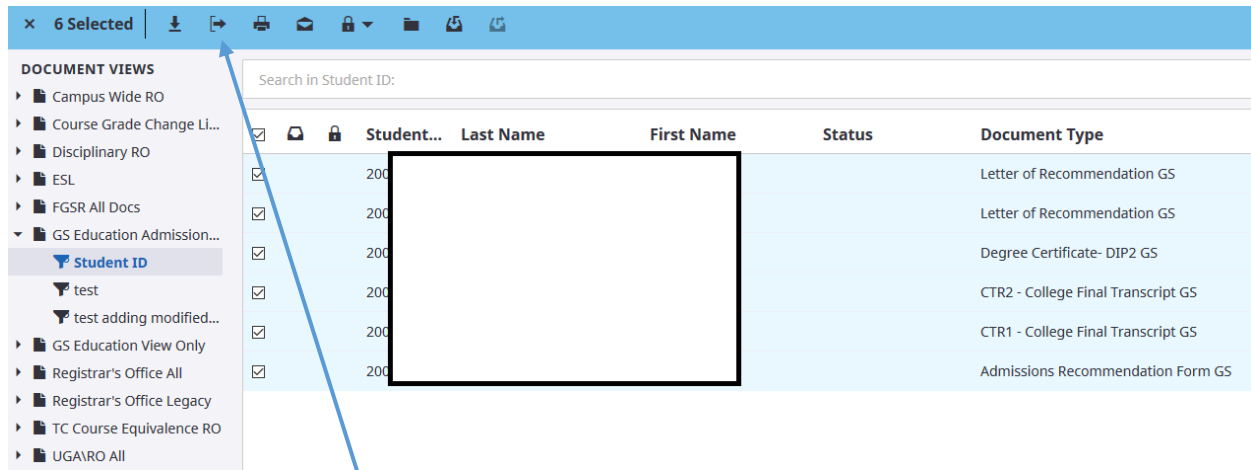
In the view named 'GS Admissions Docs' enter the student id that you want to download all admissions documents for. This will display all admissions related documents for that student.

A screenshot of a web browser displaying the Perceptive Experience interface. The browser's address bar shows the URL: https://contentweb-test.cc.uregina.ca/experience/#documents/view/321Z36N\_004CTE8JW0001XF. The page title is "Documents > Student ID". On the left, there is a "DOCUMENT VIEWS" sidebar with a tree structure. The "Student ID" view is selected. The main content area features a search bar labeled "Search in Student ID:" and a table of documents. A blue arrow points to the empty checkbox in the first column of the table, which is used for selecting all documents. The table has columns for "Student ID", "Last Name", "First Name", "Status", "Document Type", and "Program".

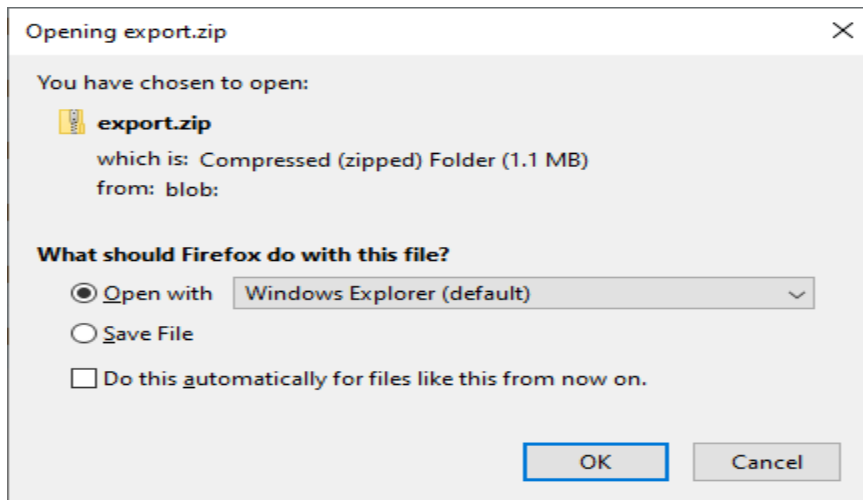
<input type="checkbox"/>	Student...	Last Name	First Name	Status	Document Type	Program
<input type="checkbox"/>	20039				Letter of Recommendation GS	MHRD Course
<input type="checkbox"/>	20039				Letter of Recommendation GS	MHRD Course
<input type="checkbox"/>	20039				Degree Certificate- DIP2 GS	MHRD Course
<input type="checkbox"/>	20039				CTR2 - College Final Transcript GS	MHRD Course
<input type="checkbox"/>	20039				CTR1 - College Final Transcript GS	MHRD Course
<input type="checkbox"/>	20039				Admissions Recommendation Form GS	MHRD Course

To select all documents, click the empty square on top left

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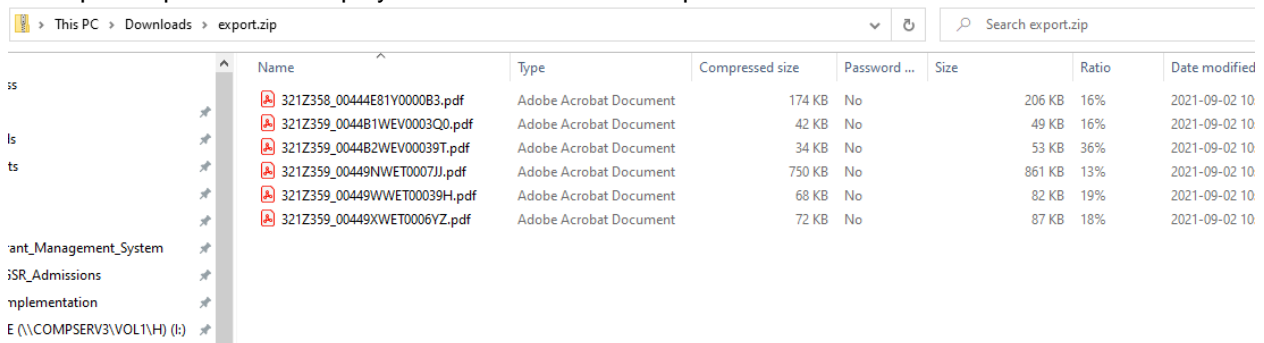


Click the Export to PDF option and the following screen appears



Click 'Save File' then OK

The Export.zip will save on our desktop under your downloads, double click the zip folder and the listing of the separate pdf files will display. See below as an example.



**Note:** The other icons (Print document) and (Download document) do not function as efficiently as the Export to PDF option described above

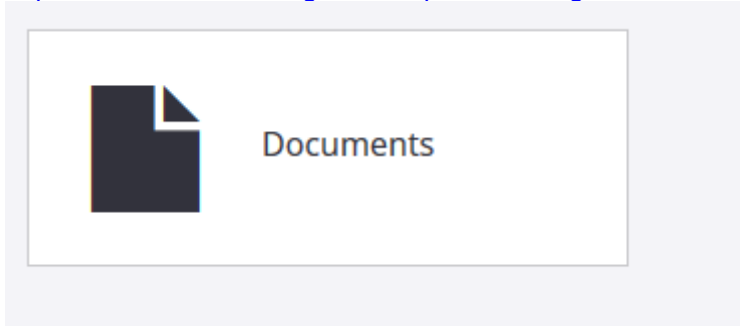
## Exporting Documents From Content

### Send To Email Option

Another option for sharing files to other system users, is to send them through email. The recipient must have a login and the appropriate permissions to URDocs to view the documents.

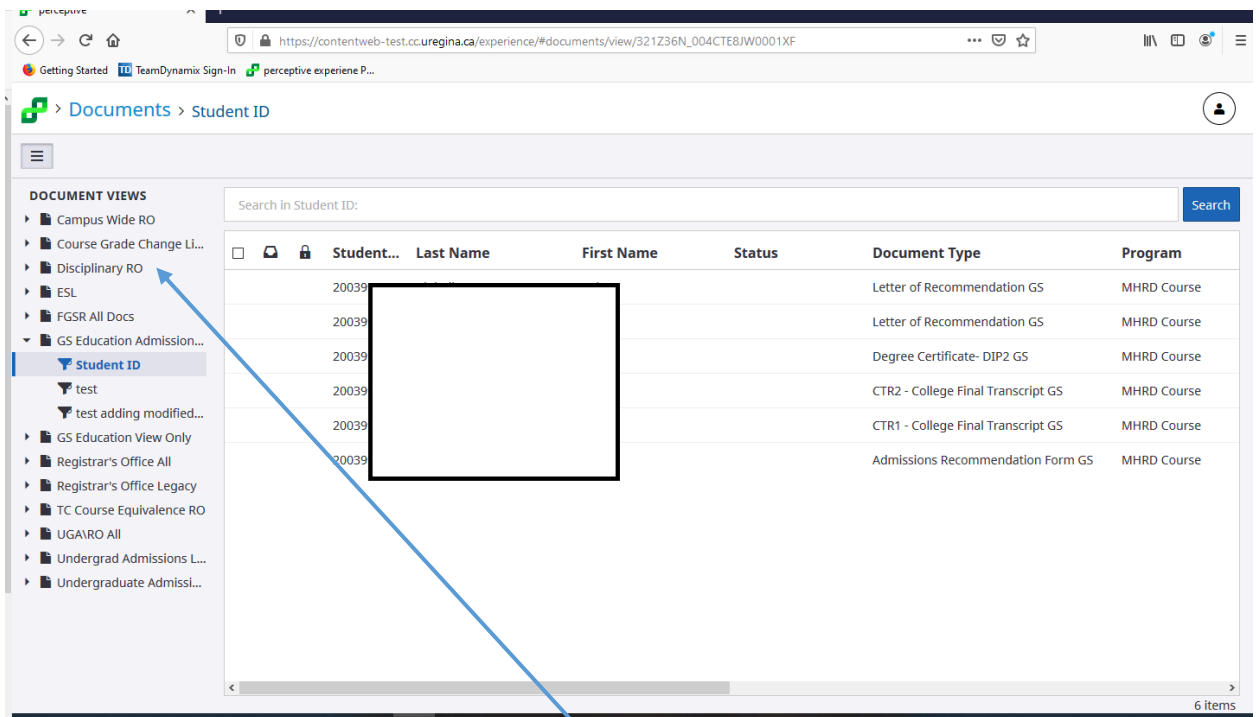
### Using the online version, Perceptive Experience

Login to the online version of URDocs (Perceptive Experience) using <https://contentweb.cc.uregina.ca/experience/#login>



Click Documents Icon

In the view named 'GS Admissions Docs' enter the student id that you want to download all admissions documents for. This will display all admissions related documents for that student.

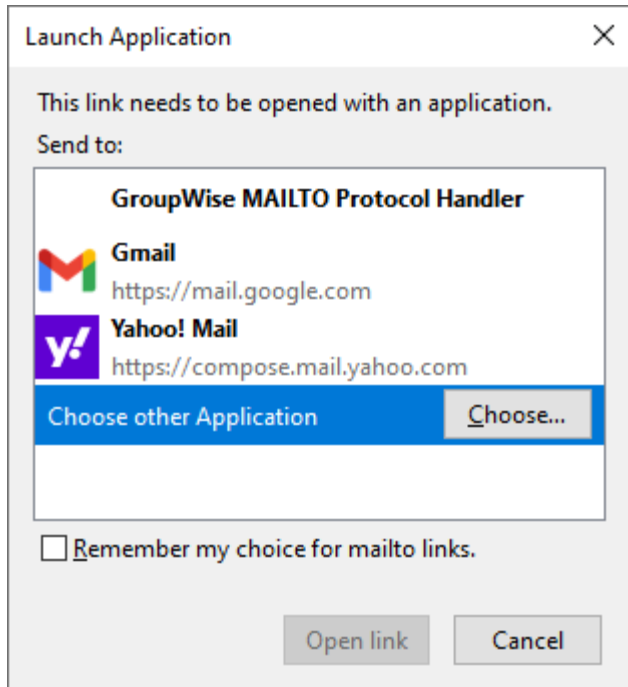
A screenshot of a web browser displaying the URDocs interface. The browser address bar shows the URL: https://contentweb-test.cc.uregina.ca/experience/#documents/view/321Z36N\_004CTE8JW0001XF. The page title is "Documents > Student ID". On the left, there is a "DOCUMENT VIEWS" sidebar with a tree structure. The "Student ID" view is selected. A search bar labeled "Search in Student ID:" is at the top right of the main content area. Below it is a table with columns: Student ID, Last Name, First Name, Status, Document Type, and Program. The table contains six rows of data. A blue arrow points from the text below to an empty square checkbox in the top-left corner of the table. The bottom right of the page shows "6 items".

<input type="checkbox"/>	Student...	Last Name	First Name	Status	Document Type	Program
<input type="checkbox"/>	20039				Letter of Recommendation GS	MHRD Course
<input type="checkbox"/>	20039				Letter of Recommendation GS	MHRD Course
<input type="checkbox"/>	20039				Degree Certificate- DIP2 GS	MHRD Course
<input type="checkbox"/>	20039				CTR2 - College Final Transcript GS	MHRD Course
<input type="checkbox"/>	20039				CTR1 - College Final Transcript GS	MHRD Course
<input type="checkbox"/>	20039				Admissions Recommendation Form GS	MHRD Course

To select all documents, click the empty square on top left

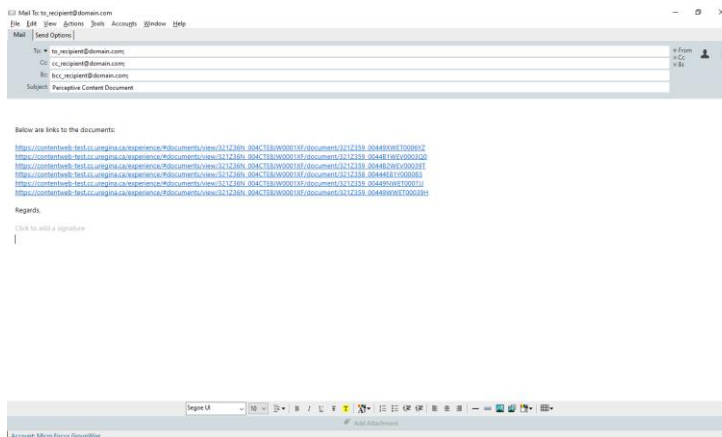
Click the 'Send Email' icon on the blue bar and the following screen appears

## Exporting Documents From Content



Pick 'GroupWise MAILTO Protocol Handler' and then click 'Open link'

The following screen appears in GroupWise



Overwrite the To, CC, BC, and Subject with the appropriate information

Sending the email will send the links to each of the selected documents to the recipient

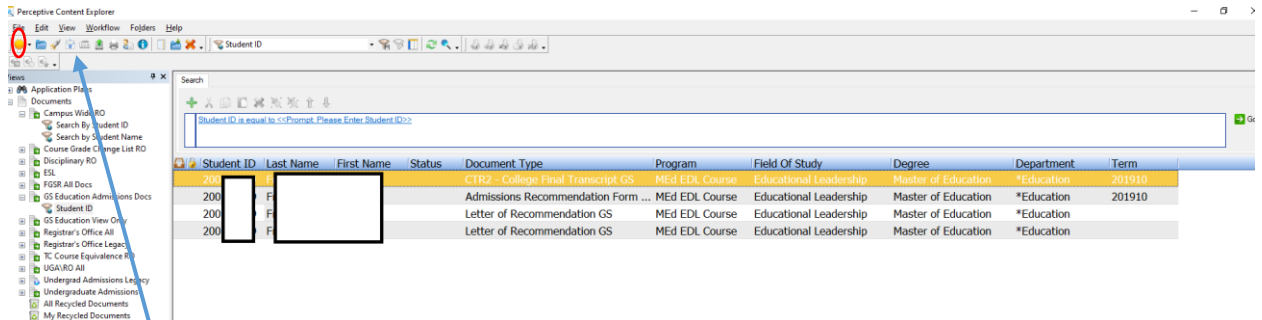
When the recipient clicks those links, it will bring the user to Perceptive Experience (online version of URDocs) for the user to login and after login, the document will display.



## Exporting Documents From Content

### In the desktop client of URDocs:

In the view named 'GS Admissions Docs' enter the student id that you want to download all admissions documents for. This will display all admissions related documents for that student.



**1B** - If you would like to display a different order of the documents on the screen, you can sort by any of the columns available

Highlight all the documents you would like to email

- If you want all documents, click the first one, hold shift and the last one and it will highlight all of them
- If you only want some of the documents, click the first one, hold ctrl and click the next one

**1C** - Click the email icon and the following screen appears

The screenshot shows the 'Email' dialog box with the following fields and options:

- General**
  - Profile: No profiles are available.
  - Email: [Empty text box]
  - Method: ImageNow Link
  - Format: [Empty dropdown menu]
- Pages**
  - [Empty text box]
  - Select All
  - Deselect All
- Annotations**
  - Include: [Empty dropdown menu]
- Buttons: Options..., OK, Cancel

Type in the email address of the recipient and click Ok

The drafted email will appear with the selected links to the documents attached. Update the subject and body of your email and send.

The recipient must login to Content desktop to view the documents attached

If the user saves the documents to a file, they are rft format and user must login to Content desktop to view the documents attached