Introduction to U of R Software
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This training course is designed to provide information regarding the standard computer programs you may be required to use, and covers a variety of topics to familiarize you with basic computer use at the University of Regina. The following software programs will be introduced:

- Email: GroupWise
- Personal Scheduler/Calendar: GroupWise
- Internal Applications:
  - Sungard Banner
  - Caspur Reports
  - FAST Reporting
  - Web Mark Entry
  - Web Services for Employees
  - Web Services for Students
- Purchasing card: details Online
- Online Course Enhancement: UR Courses
- Applying for Staff Accounts
SECTION 2
STAFF ACCOUNTS

A. General Information

Information Services coordinates the creation and security of staff accounts at the University of Regina. Effective November 1, 2005, Area Administrators are required to enter a ticket into footprints to request accounts. If you are not sure who this person is please consult the following website for a list:

http://www.uregina.ca/compserv/ITSC/staffinfo/docs/Account_Creation_Contact_List.pdf

This list is on the Computing Services website. Both Computing Services and the IT Support Centre websites have valuable information for new staff members.

To access the IT Support Centre home page:

1. Go to the main University of Regina Computing Services homepage: www.uregina.ca/compserv
2. Click the IT Support Centre link under the Top 10 Items of Interest.
3. Select Staff and Faculty Information link
Note: Before applying for new accounts, please check with your supervisor to find out if this has already been done on your behalf.

Note: Computing Services will provide you with your username and initial password. For more information on new accounts, contact the IT Support Centre at 585-4685.

For further assistance, please contact us:
IT Support Centre
585-4685
ED 549
IT.Support@uregina.ca
SECTION 3
GROUPWISE -EMAIL

For more information about GroupWise please visit the U of R GroupWise website at: www.uregina.ca/groupwise. Resources include frequently asked questions and answer, quick sheets, manuals, tips and much more.

A. Starting GroupWise

To open the GroupWise Program:

1. Find the GroupWise icon on the Desktop and Double Click
   OR
   Click Start, All Programs,

B. Log in to GroupWise

The log in screen will appear:

1. Enter your Username
2. Enter your Password
3. The Address and Port should default in
4. Click OK
C. **How to Subscribe/Unsubscribe to Campus Wide Email**

1. Open up the following link, [www.uregina.ca/emaillists/view.html](http://www.uregina.ca/emaillists/view.html)

   To view or update the lists you are subscribed to, enter your UofR email username and password. Your subscriptions will then be displayed.

   Username
   
   Password
   
   Submit

2. Enter your novel username and password to access the email lists available
3. Check the options you would like to receive

   You are currently Subscribed to the following Compulsory Lists and will remain so:
   
   - alerts
   - systems
   - president
   - deans_and_dirs

   You are currently Subscribed to the following Elective Lists:
   
   - research
   - classifieds
   - cupe
   - training
   - apt
   - releases
   - hr
   - events
   - misc
   - turf
   - international
   
   Submit

4. Click the Submit button

D. **Sending and Receiving Mail**

I. **Sending a Message**

   **To compose a message:**

   1. Click the “New Mail” button.
   2. Fill in appropriate fields.
   3. 

   **To enter the envelope information:**

   1. Place cursor in To field and enter recipient(s) email. If more than one separate by semicolon.
   2. Tab to the subject field.
   3. Type the subject of the message.
   4. Tab again to the text section of the message.
   5. Type the message.
   6. (Optional) Click Send Options tab to assign categories, priority, classification, reply request, expiration date, or delayed delivery.
   7. Click the send button.
II. Status of Mail

GroupWise graphically indicates the status of your mail to the left of each message:

- Indicates mail that is received but unopened. The ‘From,’ ‘Subject,’ and ‘Date’ areas of unopened messages will also be **bolded**.
- Indicates mail that has been opened.
- If a message contains an attachment, a paperclip representing that attachment will accompany the envelope.
- Messages that have been **replied** to are indicated with a small arrow beside the envelope.
- The number of new messages is indicated by the small blue number in square brackets beside your mailbox in the folder list on the right.

III. Viewing Messages

The Message Viewer window consists of two or three parts.

- **Envelope Section** - contains the name and e-mail address of the sender and recipient. It may also contain a subject line.
- **Message Viewer** - contains the text of the message. If an attachment has been added to the message.
- **Attachment location** - will appear containing an icon indicating the type of attachment and its name.

**To view a message:**
1. **Double click** anywhere on the mail message.
2. For more information, click on the **Properties tab**.
3. Moving to next or previous message, using the iconic buttons.
4. To close use close icon or click on the ‘X’ in the upper right corner of the window.
IV. The Compose Window

Compose Formatting available when in HTML mode include:

- Copy/Cut/Paste
- Bold/Italicize/Underline/Font change
- Spell Check
- Subscript and Superscript
- Bulleted and Numbered Lists
- Alignment Change
- Insert Horizontal Line/Hyperlink/and Picture

To turn HTML view on:
1. Choose the view menu option when in a mail message
2. Select HTML

Note: HTML view takes extra resources and will not be necessarily be seen by recipient's email program.

GroupWise has an automatic spell checker that underlines misspelled word in red. There is also an advanced spell check option to quick correct and customize.

To use the advanced spell check function:

1. Place your cursor in the message area.
2. Click on spell check button.
3. Each misspelled word will be displayed along with the closest matches the computer can come up with.
4. Once open choose to replace, skip once, skip always etc.
5. When GroupWise has gone through all of the spelling corrections it will ask you to close the Spell Checker.
6. Click Ok.

V. Trash Can

Items deleted will NOT be expunged from the system immediately; rather, they are moved to the Trash.

To delete items (to the Trash):
1. Click on the item
2. Select the item you wish to delete by single clicking on it
3. Click the Delete button on the left of the toolbar OR
4. Press the Delete key on your keyboard OR
5. Right click on the item and select Delete from the list.

To restore a deleted item from the Trash:

1. Single click on the Trash folder to open it.
2. Single click on the item you wish to restore
3. Click the Undelete button on the toolbar OR
4. Right click on the item and select Undelete

To delete an item from the Trash (permanent):

1. Open the Trash folder
2. Single click on the desired item
3. Press the Delete key on your keyboard OR
4. Right click on the item and select “Empty Selected Items” from the list.
5. Click OK when the warning appears.

Note: Once items have been removed from your Trash they cannot be recovered.

To empty the Trash:

1. Right click on the Trash folder and select “Empty Trash” OR
2. Click once on the Trash Can
3. Click on the “Empty Trash” button in the toolbar OR
4. Right click anywhere in the Trash and select “Empty Trash from the list.
5. Click Yes when the warning appears.

Note: Once items have been removed from your Trash they cannot be recovered.

III. Viewing from the Mailbox

Appointments appear in two places: Mailbox and Calendar.

To view an appointment:
1. Double click on the appointment you wish to view.
2. Close the window when you are done viewing the appointment.

E. Saving Messages and Attachments

I. Saving Messages

To save a message (or any component of the message):

1. Open the message/appointment.
2. Click on save button.
OR

3. Select “Save As” from the file menu.
4. A window will open that lists the message and all attachments.

5. Click on the item (or Shift + Click to select a range, or Ctrl + Click to select a group) you wish to save.
6. Click on Browse to change location.

7. Click OK
8. Change the name of the “Save file as:” field (or leave it as is).
9. Click Save.
10. Repeat steps 5-9 for each item you wish to save.
11. Click close.

F. Closing GroupWise

When finished using the GroupWise program:
1. Choose File – Exit
   OR
   Click the “X” in the top right corner of the program
SECTION 4
GROUPWISE CALENDAR

A. Calendaring Basics

I. Accessing the Calendar View

In GroupWise, the Calendar can always be easily accessed in two ways: either by clicking on the Calendar tab at the top of the main window, or by clicking on the Calendar in the folder menu.

To see the tasks and/or the notes list in the calendar view:

In day view the tasks and notes are always visible. In week and month view they must be turned on or off.

1. Click on the show/hide tasks button to toggle the tasks on and off.
2. Click on the show/hide notes button to toggle the notes on and off.
II. Views

The Calendar can display in four basic formats: Day, Week, Month, or Year. There is also a Multi-User function for scheduling appointments between several parties.

To change Calendar views:

1. Click on the view you wish to use.

III. Date Control Options

GroupWise provides buttons that conveniently switch between dates. The group appears in the upper left corner of the Calendar view.

The Today button will return you to today’s current date. The two arrows will move the Calendar forward or backward one day, week, month, or year, respective to the view you are using.

Clicking on the small calendar beside the date will expand the Date Control bar to allow you to navigate to a specific day.

Note: This mini calendar exists in many different places throughout the program. Anywhere you find this calendar, you may use it to change the date.
1. Click the arrows on the left (beside the month) to move through the months and the arrows on
the right (beside the year) to move through the years (backwards to 1970 and forwards to 2106).
2. Click on the date you wish to view.
3. To return to today’s date (but not load it into the main calendar), click on the Today button
below the mini calendar.
SECTION 5
U OF R ACCESS FROM OTHER LOCATIONS

A. Opening/Accessing WebAccess (E-mail)

The WebAccess service is designed to access your U of R email from a location where GroupWise software is not available. The log in screen for WebAccess has a username and password field, which are the same as your Novell and GroupWise log in. WebAccess works and looks like the full version of GroupWise and offers almost all functionality. Please consult www.uregina.ca/groupwise for step by step instructions.

To Access/Open WebAccess:

1. Type in the web address https://gwweb.uregina.ca
   OR
   Go to www.uregina.ca/groupwise and select GW Web Access from the side menu
2. Type in your username, password, Connection Speed
3. Click the login button
B. **NetStorage**

I. **General Information on NetStorage**

The NetStorage system allows an interface between you and your network file storage from a web browser no matter where you are located, without the installation of any software.

The web address to access Net Storage is: [https://netstorage.cc.uregina.ca/](https://netstorage.cc.uregina.ca/)

Within the NetStorage system there are some known issues, if you are logged into Novell and have the file open then the file cannot be accessed from NetStorage because it is locked. The only solution is to remember to close the file at work before leaving if you are expecting to want to access it from home using NetStorage. Also, occasionally right clicking on a file and choosing download doesn't work. You can still download the file by double clicking on it.

**Note:** To access NetStorage you must use Internet Explorer or Netscape version 6.2 or greater.

II. **Logging in to NetStorage**

1. Navigate to the NetStorage website: [http://netstorage.cc.uregina.ca](http://netstorage.cc.uregina.ca)
2. Click the Access NetStorage Link.

   ![NetStorage Access](https://netstorage.cc.uregina.ca)

   **Known Issues**
   - If you are logged into Novell and have the file open then the file cannot be accessed from NetStorage because it is locked. The only solution is to remember to close the file at work before leaving if you are expecting to want to access it from home using NetStorage.
   - Occasionally right clicking on a file and choosing download doesn't work. You can still download the file by double clicking on it.

   You will be prompted to Log in to the NetStorage system. The User name is your Novell Login ID and the password is your Novell Password.

3. Once logged in you will have access to the various drives you normally see at work using ‘My Computer’ or ‘Windows Explorer’
Note: The Home@UOFPR drive represents your personal I:\ drive.

III. Downloading Files from NetStorage

To Download a file from NetStorage:
1. On the left hand side, click the drive you wish to view.
2. The folders and files will be shown in the main frame.
3. Navigate to the appropriate folder on the left.
4. Select the file you wish to download in the main frame.

Note: You may not be able to see all the files in the folders. It will only show the first 25 files, listed in alphabetical order. To see the next 25 files you must use the scrollbar at the bottom.

5. On the NetStorage menu, click File - Download.
6. An option box will pop up, asking if you want to open or save the file

   ![File Download Dialog]

7. Click Save
8. Select the location/folder where you wish to save the file on your hard drive
9. Click Save
10. The file will be saved in the location you selected

IV. Uploading Files into NetStorage

To Upload a file into NetStorage:
1. On the left hand side, navigate to the drive and folder that you wish to upload a file into.
2. On the NetStorage Menu, click File – Upload

   ![Uploading File Dialog]

3. Click Browse
4. Locate the file you wish to upload and click Open
5. Click Upload
6. The file will be uploaded from your hard drive to the Network drive
SECTION 6
INTEGRATED SOFTWARE SYSTEM: SUNGARD BANNER

BANNER is a software package -- purchased by the University of Regina from Sungard -- that runs most of the administrative systems of the U of R. CASPUR (Computerized Administrative Systems & Processes at the University of Regina) is a collective of the systems that keep the University running. Banner is part of CASPUR. Other components of CASPUR include Banner Self-Service web products, the Purchasing Card System, and Physical Plant Facilities Management System.

Within BANNER there are five modules: Finance, Human Resources, Student, Advancement (formerly Alumni) and Financial Aid. Within these systems there are many different sub modules.

A. Student

The Banner Student System is a flexible, comprehensive solution to the problems of student administration. It delivers the information you need to better control your administrative costs, which typically represent the largest single expenditure in your budget. Banner Student supports the full range of functions necessary for student administration including: creation of catalogs; data collection for scheduling of classes, administrations, assignments of housing, faculty workload analysis, and registration; all accounts receivable; and academic history and degree audit reporting.

The Student System benefits many of the administrative offices. To further maximize is data availability, the Student System is fully integrated with the Banner Finance, Human Resources, Alumni/Development, and Financial Aid Systems.

B. Advancement (Alumni)

The Alumni system supports the diverse activities to a successful institutional advancement program. It handles the day-to-day activities of the alumni and development offices, such as maintaining comprehensive information about individuals and organizations, tracking pledges, and recording gifts. The system also provides the necessary information for program planning and evaluation.

Functions such as volunteer management, membership program analysis, prospect tracking, matching gift processing, and constituent solicitation are efficient and easy to use. Online processing keeps biographical and giving records continually updated. The Banner Alumni/Development System receives valuable information on new graduates as well as past and present students from the Banner Student through an interface.

Similarly, financial data from the Banner Alumni/Development System is transferred through an interface to the Banner Finance System. Payroll deductions from the Banner Human Resources System can be interfaced to create gifts in the Banner Alumni/Development System. Forty standard reports accompany the system. The system greatly enhances the alumni and development offices’ productivity and responsiveness to their important external audiences.
C. **Finance**

The Banner Finance System is a system that has both the functionality and flexibility to serve multiple users through a common database of financial information. Banner Finance not only responds to accounting requirements, but also addresses the need for strategic and operational information.

The Banner Finance System is a complete financial information and management system. It delivers the strategic financial data that executives and business officers need in order to make the right fiscal decision. The system distributes purchasing functions to the Purchasing Department and accounts payable and check processing functions to the Accounts Payable Department. Each module is designed for the department it is to serve. SCT delivers full batch and online reporting into your hands.

Overall, the Banner Finance provides a comprehensive, integrate financial management system, which enables the University to track, maintain, and process all of your relevant financial data.

D. **Human Resources**

Banner Human Resources supports the full range of functions for human administration, including employment and compensation; budget preparation and monitoring; position control and staffing; applicant tracking; requisition and processing; EEO; W-2, and 1099-R reporting; payroll processing; labor relations; health and safety administration, and administration of benefits and leaves.

While the Human Resources System benefits the Human Resources Office, it also assists the administrations with prompt and accurate budget and position data. Banner management capabilities are a useful tool in tax reporting and payroll calculation. To maximize its data availability, the Human Resource System can be fully integrated with the Banner Student, Finance, Alumni, and Financial Aid Systems.

Today’s challenging environment of constantly changing government regulations and business requirements calls for a versatile, comprehensive human resources management system. By providing the automated tools needed, the Banner Human Resources System gives the University the ability to collect and manage vital information about our most important asset—people.

E. **Financial Aid**

Handling the daily activities of the financial aid office, the system performs tracking, budgeting, need analysis and packaging. Meeting the demands for information, Banner Financial Aid contains the following integrated components: applicant record creation, requirements tracking, student budget assignment, need analysis, and packaging. Also included are funds management, disbursement, award history/transcripts, direct lending, electronic data exchange (EDE), and reporting.
SECTION 7
BANNER NAVIGATION

A. Logging On to BANNER

Banner version 7 is run at the University of Regina in its Internet Native form, known as INB (Internet Native Banner). It can be accessed from any computer with Internet Access, and does not require installation of the Banner software on an individual computer.

To access Internet Native Banner:

1. Open Internet Explorer or Netscape
2. Access the U of R homepage www.uregina.ca
3. Point to the ‘Faculty & Staff’ link or ‘Quicklinks’ and click ‘Banner(Internet Native)’
4. The first time you access Banner 7 on the internet you may be prompted to accept installation of a Java-Initiator file.
5. Click “Yes”, then “Next”, then “OK” when prompted.

Note: This file is required to run Banner Internet Native Version on your computer. Once installed, this file will not need to be downloaded again unless a new version of the file is required.

6. A second Explorer window will open, and prompt you for your Login and Password.
Note: There are 2 explorer windows that must remain open when you are running Banner 6 INB. If you close the first window, the second will close as well.

B. The Databases

The University of Regina maintains several Banner databases for various uses including:

<table>
<thead>
<tr>
<th>Database</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROD</td>
<td>“live” database used to record information, and used daily</td>
</tr>
<tr>
<td>QPRD</td>
<td>backup copy created each night, and used for some reporting</td>
</tr>
<tr>
<td>TRNG</td>
<td>database used to conduct training</td>
</tr>
</tbody>
</table>

C. Banner Training Sessions

Please visit the Technology Learning Centre’s website – [www.uregina.ca/training](http://www.uregina.ca/training) – for the Banner training schedule. If your faculty administrator requests Banner access on your behalf, you will automatically be registered for the related Banner training sessions.

D. Forms

Most of the screens you’ll see in BANNER are “forms”. A form is similar to a paper form in that it is used to enter and look up information. However, it is an online version of the paper. A form visually organizes information so it is easy to enter and read. In an online form information is entered once and then may be used by other forms, reports and jobs in any module.

Each form in Banner has a name (ie. Identification Form) and a seven character abbreviation (ie. SPAIDEN). The form name and abbreviation is displayed on the title bar once you have accessed the form. Each of the seven characters in the abbreviation identifies information about the form.

To access a form use one of the following options:

1. If you are at a menu you may select the form name from the menu. The form names are listed as well as their seven-character form name directly beside them. Menus are denoted with a (*) to the left of their name, a form will not have the (*).
2. If you are at the Main Menu you may type the 7-letter form code into the Go To…Box and press Enter.
3. If you are already in a form you may access any other form using the menu:
   a) Choose File, Direct Access or F5
   b) Type the 7-letter code of the form you wish to access
   c) Press Enter

   **Go To…**

---

Welcome,
E. Blocks

Some paper forms have multiple pages and are divided into specific areas (such as name and address, program information, etc.). BANNER uses the “block” to indicate a portion of a form. For example, the Identification Forms (SPAIDEN, APAIDEN, PPAIDEN) have a number of blocks within it including Current Identification Block, Previous Identification Block and Address Block. Moving from block to block may be done a number of ways.

The first block in most forms is called the Key Block. This block usually must have some data entered before the other blocks in the form may be viewed. The key block usually stays on the form as subsequent blocks appear.

To get to the next block do one of the following:
1. Choose Block, Next from the menu.
3. Click the Next Block button on the toolbar

To get to a previous block do one of the following::
1. Choose Block, Previous
2. Press Ctrl+PageUp
3. Click the Previous Block button on the toolbar

To get to a specific block:
1. Choose ‘Options’ from the top menu bar and select the block you want from the list

F. CASPUR List Serve

The Caspur Email List was set up to send important messages to users of the CASPUR/Banner system. These include important announcements as well as hints and ideas. While everyone who uses Banner should sign up to receive messages on the Caspur List, it is especially important that anyone involved with Student Registration received these messages.

To Subscribe:
1. Open and Log into ExecMail or other Email Program.
2. Compose a new message.
3. Address To: Majordomo@majordomo.uregina.ca
4. Leave the Subject: area blank.
5. Text of the Message is to be one line only, as follows:
   
   SUBSCRIBE CASPUR first.last@uregina.ca

6. Send Message.
7. You will receive an email confirming that you have been successfully added to the List.

To Unsubscribe:
1. Compose a new message as above To: Majordomo@majordomo.uregina.ca
2. Leave the Subject: area blank.
3. Text of message to read as follows:

   UNSUBSCRIBE CASPUR first.last@uregina.ca
4. Send Message.
4. You will receive an email confirming that you have been successfully removed from the List.

Note: In this example we have shown the standard U of R email address, where ‘first’ is Your First Name and ‘last’ is Your Last Name. You could also substitute another valid Email Address.
SECTION 8
REPORTS FROM BANNER: CASPUR REPORTS

Some special reports have been created in Microsoft Access to provide information in a wide variety of areas and enable printing data in summarized form. These reports are used by all areas of the University. Each menu has several sub-menus that categorize the different reports available. To access Caspur Reports, you must have a valid Banner Username and Password.

A. Starting Caspur Reports

1. Click Start, Programs, Banner, Caspur Reports
   OR

   Select Caspur Reports on the desktop

2. The Caspur Reports Main Menu will open.

3. When the Caspur Report opens you will be prompted for a user name and password.

4. These will be the same as you use to logon to Banner.
B. Tips for Caspur Reports

These are a few helpful tips for finding Caspur Reports.

I. The Search Function

There is a search function on the Caspur Reports menu that can assist by finding a specific report. It is particularly useful if you know the name of the report but cannot remember which folder it is stored in.

To search for a report:
1. Select the search function off the menu bar.
2. Enter the keyword(s) that may be in the report title.
3. Select “Search Now”
4. A list of all the reports with that(those) word(s) in the title will appear.
5. Select the report you would like to run
6. If you do not get the report you wish, check to make sure that the “Case Sensitive” checkbox is unchecked and run the search again.

II. Customizing CASPUR Menu

You can customize Caspur with a list of the reports you commonly run using Favorites.

To add a report to your Favorites list:
1. Navigate to the report you would like to bookmark.
2. Select the report without actually opening it.
3. Select “Favorites,” to open the Favorites pane and click the Add button OR
4. Right click on the report and select “Add to Favorites.”
5. This will open up the Add window, which will allow you to give the report an alternate title or alias. If you change this, it should be named something that will indicate the reports functionality to you.
6. Select OK
Note: This will only change the name in your Favorites, not in the Caspur Reports menu

To make change to your favorites:

1. Click the Favorites button
2. Select the Organize button on the Favorites menu.
3. This will open the “Organize Favorites” window.
4. From here you can delete or rename your Favorites.

Note: This will only rename or delete the report name in your Favorites, not in the Caspur Reports
SECTION 9
UR SELF-SERVICE

A. UR Self-Service Homepage

1. Open an Internet Browser
2. Go to the University of Regina homepage: www.uregina.ca
3. Click on ‘UR Self Service login’

B. Logging in to UR Self Service

1. Click ‘UR Self Service’

   ![User Login form]

   - **User Login**
   - Enter your **User ID** (your staff/student number, consisting of nine digits) and **PIN** (consisting of six digits) below, then select “Login”.

   When you are finished using UR Self Service, please Exit (top, right corner) and close your browser to protect your privacy.

   - **User ID:**
   - **PIN:**

   ![Login and Forgot PIN buttons]

2. Enter your 9-digit University of Regina ID Number
3. Enter your 6-digit PIN (password)

   **Note:** This ID and PIN will be sent to you by the IT Support Centre, after your faculty administrator has request a staff account
4. Click ‘Login’
5. The UR Self Service main menu will appear:

   **Note:** The options you have will depend on your status. You will only see the Student menu if you are a Student and you will only see the Alumni menu if you are an Alumnus.
C. Looking up Personal Information

1. Click “Personal Information”
2. The Personal Information Menu will appear

- Change PIN
- Change Security Question
- View Address(es) and Phone(s)
- Update Address(es) and Phone(s)
- Check/Set E-mail Forwarding
- View Emergency Contacts
- Update Emergency Contacts
- Update Marital Status
- Name Change Information
- Social Insurance Number Change Information

3. Click the area you wish view
4. Make updates as required
5. Click Menu at the top of your screen to return to the Personal Information menu

D. Looking up Employee Information

1. Click “Employee Services”
2. The Employee Services Menu will appear

Benefits and Deductions
View your retirement plans, Health insurance information, miscellaneous deductions; and your beneficiary information.

Pay Information
View your Direct Deposit breakdown; View your Earnings and Deductions History; View your Pay Stubs.

Tax Forms
View your T4 form or your TD1/TP-1015.3 information.

Current and Past Jobs

Time Off Current Balances and History

I. Benefits and Deductions

1. Click Benefits and Deductions
2. The Benefits & Deductions Menu will appear

- Retirement Plans
- Health Insurance
- Miscellaneous
- Beneficiaries and Dependents

3. Click the area you wish to view.
4. Click the Return to Menu to go back
5. Click Employee tab at the top of your screen to return to the Employee Services Menu
II. **Pay Information**
1. Click Pay Information
2. The Pay Information Menu will appear
   - Direct Deposit Breakdown
   - Earnings History
   - Pay Stub
   - Deductions History
3. Click the area you wish to view
4. Click the Return to Menu to go back
5. Click Employee tab at the top of your screen to return to the Employee Services Menu

III. **Tax Forms**
1. Click Tax Forms
2. Choose the topic you want to view
   - TD1 Personal Tax Credits / TP-1015.3 Source Deductions (Quebec only) Return Slips for Income Tax Return
3. Click the Return to Menu to go back
4. Click Employee tab at the top of your screen to return

IV. **Current and Past Jobs**
1. Click Current and Past Jobs
2. A listing of your Employment History will be shown

<table>
<thead>
<tr>
<th>Title</th>
<th>Begin Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banner Trainer</td>
<td>Jan 01, 2007</td>
<td></td>
</tr>
<tr>
<td>Temporary Assignment of Duties</td>
<td>May 24, 2005</td>
<td>Dec 31, 2006</td>
</tr>
<tr>
<td>Assistant Trainer</td>
<td>Oct 12, 2004</td>
<td>Dec 31, 2006</td>
</tr>
<tr>
<td>Alumni Services Office</td>
<td>Feb 01, 2000</td>
<td>Oct 11, 2004</td>
</tr>
<tr>
<td>Clerk I</td>
<td>Aug 23, 1999</td>
<td>Jan 31, 2000</td>
</tr>
<tr>
<td>Clerk II</td>
<td>Jan 25, 1999</td>
<td>Aug 31, 1999</td>
</tr>
</tbody>
</table>

3. Click on a position to view more details
4. Click the Return to Menu to go back
5. Click Employee tab at the top of your screen to return to the Employee Services Menu

V. **Time Off Current Balances and History**
1. Click Time Off Current Balances and History
2. A listing of your Float Days and Sick Leave will be shown
3. Click either Float Days or Sick Leave to see more detail
4. Click the browser’s Back button to return to the list
5. Click the Return to Menu to go back
5. Click Employee tab at the top of your screen to return to the Employee Services Menu

E. Student Services

1. Click “Student Services”
2. The Student Services Menu will appear
3. Click the area you wish view
4. Look up information as required
SECTION 10
WHAT IS A FOAPAL?

What is a FOAPAL?

F = FUND CODE

- Designates the type of funds i.e. APEA, Research, Capital
- ie: 10000=General Operating

O = ORGANIZATION CODE

- Designates the Faculty, Department or Area the Fund is a part of i.e. Science, Printing Services
- ie: 2100 = Arts

A = ACCOUNT CODE

- Designates the type of goods being purchased i.e. Travel, Books, Printing, Software
- ie: 6102 = Materials & Supplies

P = PROGRAM CODE

- Designates the general classification of the FOAPAL i.e. Administrative budget, Faculty budget
- ie: 120 = Faculty

A = ACTIVITY CODE

- Designates what area within a department the funds are being expended for. These are set up by departments if requested for individual department use
- ie: DEAN

L = LOCATION CODE

- Not Used

If we put the examples above together, we have the FOAPAL:

10000-2100-6102-120-DEAN
SECTION 11
ACCOUNT CODES

Using the example above you will be changing the ‘A Account Code’ often as you use your FOAPAL. Commonly used accounts are listed on the Financial Services website: http://www.uregina.ca/fs/documents/common_accounts.pdf

The account portion of the FOAPAL: 10000-2100-6102-120-DEAN must be changed depending on how the FOAPAL is charged. For example, 6102 is used when purchasing General Materials & Supplies while 6242 is used when charging Staff Travel.

<table>
<thead>
<tr>
<th>CODE</th>
<th>DESCRIPTION</th>
<th>Number</th>
<th>Item</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>5000</td>
<td>Gifts and Donations:</td>
<td>5000</td>
<td>Individual Donations With Receipt</td>
<td>120</td>
</tr>
<tr>
<td>5001</td>
<td></td>
<td>5001</td>
<td>Individual Donations No Receipt</td>
<td>120</td>
</tr>
<tr>
<td>5101</td>
<td>Corporate Donations</td>
<td>5101</td>
<td></td>
<td>120</td>
</tr>
<tr>
<td>5201</td>
<td>Non Profit Donations</td>
<td>5201</td>
<td></td>
<td>120</td>
</tr>
<tr>
<td>6504</td>
<td>Foundation Donations</td>
<td>6504</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5091</td>
<td>Fees:</td>
<td>5091</td>
<td>Fees Non-Credit</td>
<td>120</td>
</tr>
<tr>
<td>5101</td>
<td>Miss Fees</td>
<td>5101</td>
<td></td>
<td>120</td>
</tr>
<tr>
<td>5102</td>
<td>Indian Language Fees</td>
<td>5102</td>
<td></td>
<td>120</td>
</tr>
<tr>
<td>5403</td>
<td>Evaluations/Rewards</td>
<td>5403</td>
<td></td>
<td>120</td>
</tr>
<tr>
<td>5105</td>
<td>Library fines</td>
<td>5105</td>
<td></td>
<td>120</td>
</tr>
<tr>
<td>5100</td>
<td>Lost Book Charges</td>
<td>5100</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6001</td>
<td>Materials</td>
<td>6001</td>
<td>Materials</td>
<td>120</td>
</tr>
<tr>
<td>6012</td>
<td></td>
<td>6012</td>
<td>Educational Equipment</td>
<td>120</td>
</tr>
<tr>
<td>6042</td>
<td></td>
<td>6042</td>
<td>Cardiac Nurses</td>
<td>120</td>
</tr>
<tr>
<td>6033</td>
<td></td>
<td>6033</td>
<td>Minor Officials</td>
<td>120</td>
</tr>
<tr>
<td>6050</td>
<td></td>
<td>6050</td>
<td>Professional Fees &amp; Honoraria</td>
<td>120</td>
</tr>
<tr>
<td>6020</td>
<td>Benefits:</td>
<td>6020</td>
<td>Benefits</td>
<td>120</td>
</tr>
<tr>
<td>6081</td>
<td></td>
<td>6081</td>
<td>Fitness Appraisals</td>
<td>120</td>
</tr>
<tr>
<td>6102</td>
<td>Materials and Supplies:</td>
<td>6102</td>
<td>General Materials &amp; Supplies</td>
<td>120</td>
</tr>
<tr>
<td>6103</td>
<td></td>
<td>6103</td>
<td>Clinical Supplies</td>
<td>120</td>
</tr>
<tr>
<td>6104</td>
<td></td>
<td>6104</td>
<td>Janitorial Supplies</td>
<td>120</td>
</tr>
<tr>
<td>6105</td>
<td></td>
<td>6105</td>
<td>Publications</td>
<td>120</td>
</tr>
<tr>
<td>6106</td>
<td></td>
<td>6106</td>
<td>Linen, Crockery</td>
<td>120</td>
</tr>
<tr>
<td>6107</td>
<td></td>
<td>6107</td>
<td>Calendars</td>
<td>120</td>
</tr>
<tr>
<td>8007</td>
<td>Operating Leases/Rentals:</td>
<td>8007</td>
<td>Elevator Maintenance</td>
<td>120</td>
</tr>
<tr>
<td>8108</td>
<td></td>
<td>8108</td>
<td>Roads and Walks</td>
<td>120</td>
</tr>
<tr>
<td>8221</td>
<td>Travel:</td>
<td>8221</td>
<td>Equipment Under Operating Lease</td>
<td>120</td>
</tr>
<tr>
<td>8222</td>
<td></td>
<td>8222</td>
<td>Equipment Rental</td>
<td>120</td>
</tr>
<tr>
<td>8223</td>
<td></td>
<td>8223</td>
<td>Space Rental</td>
<td>120</td>
</tr>
<tr>
<td>8241</td>
<td></td>
<td>8241</td>
<td>Travel</td>
<td>120</td>
</tr>
<tr>
<td>8242</td>
<td></td>
<td>8242</td>
<td>Staff Travel</td>
<td>120</td>
</tr>
<tr>
<td>8343</td>
<td></td>
<td>8343</td>
<td>Visiting Scientist</td>
<td>120</td>
</tr>
<tr>
<td>8544</td>
<td></td>
<td>8544</td>
<td>Field Trips</td>
<td>120</td>
</tr>
<tr>
<td>8745</td>
<td></td>
<td>8745</td>
<td>Recruiting</td>
<td>120</td>
</tr>
<tr>
<td>8901</td>
<td></td>
<td>8901</td>
<td>Staff Development</td>
<td>120</td>
</tr>
</tbody>
</table>
SECTION 12
TRANSFERRING BETWEEN FOAPALS

To transfer money between FOAPALS you must fill out a JV or Journal Voucher form and send the form to Financial Services. Below is an example of a Journal Voucher form found on Financial Services website:
http://www.uregina.ca/fs/forms.shtml

The first line in this JV is debiting or taking out $60.50 from the FOAPAL 10000-3345-6109.
The second line in this JV is crediting or putting in $60.50 from the FOAPAL 10000-3330-6109.

<table>
<thead>
<tr>
<th>Index (Opt)</th>
<th>Fund (Required)</th>
<th>Org (Required)</th>
<th>Account (Required)</th>
<th>Prog (Default)</th>
<th>Act (Optional)</th>
<th>Loc (Optional)</th>
<th>Description (29 Characters)</th>
<th>Debit (Dr.)</th>
<th>Credit (Cr.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000</td>
<td>3345</td>
<td>6105</td>
<td>110</td>
<td></td>
<td></td>
<td></td>
<td>Conference Food</td>
<td>60.50</td>
<td></td>
</tr>
<tr>
<td>10000</td>
<td>3330</td>
<td>6105</td>
<td>110</td>
<td></td>
<td></td>
<td></td>
<td>Conference Food</td>
<td></td>
<td>60.50</td>
</tr>
</tbody>
</table>

Requested by: Michele

Date: 28/02/2007

Document Total (Dr. + Cr.): $2100
SECTION 13
FINANCIAL REPORTING: FAST REPORTING TOOL

A. General Information

The Financial Administration Support Tool (FAST) is a web based financial reporting package and is a product of Millennium Computer Systems. It was implemented to enable advanced searching, retrieving and reporting of information currently stored in the BANNER system. Reports can be run based on various criteria, and you may select one or many criteria, depending on your needs. This system will also facilitate reporting for periods that do not coincide with the University of Regina fiscal year.

The main features of this product are:

- date range reporting, which is useful for March Research funds
- gives an overall summary by account for a fund
- ability to drill down into accounts to see detailed transactions
- can see open commitments, and can drill down to see their composition
- can click on invoices, PO's, revenue feeds or payroll feeds to get more information
- can see Balance Sheet for Capital and Research, which has a small table at bottom indicating uncommitted funds available or overspent
- ability to lookup the fund or org codes that you have access to
- only need to put in a fund code or an org code, not both
- indicates whether a fund is active or closed
- can get summaries or detail by activity code across funds and orgs
- can query on rollup funds and orgs

B. Navigation

The following are important concepts to keep in mind:

- Click on anything green to get more information.
  i.e: If you click on a blue dollar amount, it shows you the transactions that make up that dollar amount
  i.e: If you click on an invoice number (starts with an ‘I’ or an ‘M’), a purchase order number (begins with a ‘P’), or a feed number (begins with an ‘F’), you will get more information about that invoice, purchase order, or feed. The feed could be payroll or revenue.
- Click on any column heading to sort by that column/ Click it a second time to reverse the sort.
- Click on ‘Next>’ to go to the next page of records.
- Click on ‘Show All Records’ to have all records appear on one screen.
- Use your web browser’s "Back" button to go back to previously viewed pages.
- Export information to Excel by clicking the link at the bottom of each web page.
- Return to the Menu from any web page by clicking the link at the bottom of each page.

Note: FAST is updated nightly from Banner’s production database; therefore, the data is 'one day old'.
C. **Logging into Fast**

To Log into FAST:
1. Access University of Regina homepage
2. Select Quicklinks>>FAST
3. You may wish to Bookmark this page now, for future use.
4. Type in your 9-digit user ID and press the tab key.
5. Type in your 6-digit password and press the tab key.
   Note that the password appears as asterisks (*) for security reasons.

   **Please provide your User ID and PIN**

   - **User ID:** [190******]
   - **PIN:** [******]
   - **ENTER**

6. Click the “Enter” button, and the main menu page will appear:

   **Please input your desired report parameters:**

   - **Chart**
   - **Fund**
   - **Orgn**
   - **Acct**
   - **Prog**
   - **Actv**
   - **Locn**
   - **Period:** [Mar-2007 (Open)]
   - **Desired Report:** [Operating Statement]
   - **ENTER**

**Note:** If PIN is unknown, call the IT Support Centre to reset at 4685.

**Note:** For security purposes, and to ensure the system runs at optimal speeds, you will automatically be logged off after a certain time of inactivity. If this happens, you will be prompted to log in again when you attempt to access information.
SECTION 14
PURCHASING CARD

A. General Information

The University of Regina Procurement Card program has been in place since January 1998. Individuals are issued MasterCard Purchasing Cards that can be used to purchase University-related goods and services.

The Purpose of the program is to:
1. Provide a convenient method for purchasing lower cost goods and services
2. Streamline the procurement process
3. Reduce transaction costs
4. Improve customer service

The Benefits to the University of Regina - Cardholders and Administration:
1. More direct and efficient means of obtaining goods and services
2. Reduce administrative effort, data entry & expense:
   - requisitions & purchase orders
   - forms, envelopes, postage, filing and cheque costs
   - multiple charges on one bill - one payment
   - petty cash reimbursement and processing reduced
3. Improve customer service
4. Enhanced management information - to identify and negotiate better Supplier contracts

The Benefits to the Suppliers:
1. Lower overhead (billing & collection paperwork)
2. Opportunity to strengthen customer relations
3. Improve payment terms
4. Reduce credit risk

B. How to Apply

To obtain a Procurement Card, you must attend an online training session. The training provides information on the rules and restrictions regarding the use of the card, as well as information on the re-allocation of funds to cover the purchases made on the card.

To apply for a card, an online request for application form must be filled out on the Supply Management Services website.

1. Go to Supply Management Services website: www.uregina.ca/sms
2. Select Purchasing Card from the side menu
3. Click Application Request Form
4. Fill out the information
5. Click the Submit button

Supply Management Services will forward an application form to the individual, which must be signed by both the person requesting the card and their dean, director or department head.
Note: You must attend Purchase Card/BMO detailsOnline training to be approved for a card.

C. detailsOnline Reconciliation

TO SIGN IN:

1. Go to www.bmodetailsonline.com
2. Enter User ID, Password
3. Select Language
4. Select Go

Note: After 3 failed attempts your password has to be reset by Supply Management Services.

EDIT TRANSACTION FOAPALS:

1. Select TRANSACTION in top menu
   OR use Quick Links – View/Modify Transaction Details
2. Set View to General Ledger to access FOAPAL information
3. Select Date range. For example, 05/05/2007 to 06/04/2007 to display
   transactions
5. Select Locate Transaction from the Transaction side menu
6. On the General Ledger Module screen, edit FOAPAL information as
   necessary
7. Add meaningful Descriptions for auditors
8. Save Changes from the General side menu
9. Save Changes BEFORE proceeding to the next page of transactions or
   changes will not save

STATEMENT OF ACCOUNT REPORT:

Note: Hard copy statements will no longer be sent by the Bank of Montreal

1. Log on to details Online.
2. Select REPORT in the menu selection
3. Click on the Custom folder
4. Click on Statement of Account Report
5. Under Parameters: Date Switch should be Processing Date
6. From Date May 5, 2007
7. To Date June 4, 2007
8. These dates will change
   for each statement period
9. Select the Submit button

Note: If you are experiencing difficulties, please make sure your pop-up-blockers in your browser is turned off.

DOWNLOAD REPORT:

11. Run ‘Statement of Account Report’ see instructions above
Select Download from top menu
A new browser window opens
Select Export Type RTF
Select Page Range ‘All’
Select View Report OR Save Report
Note: Please reconcile MasterCard Statement before the 18th of the month in detailsOnline and send all supporting documentation including the signed statement of accounts to Financial Services before the 25th of the month.
SECTION 15
ENTERING GRADES ONLINE: WEB MARK ENTRY

The Web Mark Entry (WME) is the application used to enter final marks. Marks for all courses managed by the Banner system will be entered through Web Mark Entry. WME is to be used by instructors, department heads, and deans from all faculties, all federated colleges, the Language Institute, Centre for Continuing Education (credit courses), and remote sites such as Saskatoon and Prince Albert (e.g. Social Work and SIFC).

A. Important Information about Web Mark Entry:

1. For Web Mark Entry to function properly, as well as the tight security around grades DO NOT SAVE YOUR PASSWORD in Web Mark Entry and disable any kind of AutoComplete password saving that may be on in your web browser, and DO NOT USE THE BROWSERS ‘BACK’ BUTTON, use the navigational buttons on the website. Instructions are below.
2. Web Mark Entry is available from 6:00AM to 9:00PM Monday to Friday and 24 hours Saturday and Sunday.
3. The University of Regina Executive Council Regulations state that examinations must be reported to the Office of the Registrar’s within five calendar days of the writing of the exam.
4. Web Mark Entry is used for the submission of final grades ONLY. Do not try to submit grades until after final exams.

Open your web browser (Internet Explorer, Netscape Navigator, or Mozilla Firefox)

Turn OFF AutoComplete in Explorer:

1. While in Explorer, click on the Tools menu in your browser
2. Choose Internet Options
3. Click on the Contents Tab
4. Under the heading Personal Information, click AutoComplete
5. Deselect the Forms check box for AutoComplete option
6. Click OK

Turn OFF Password Manager in Netscape:

1. While in Netscape, click on the Edit menu
2. Choose Preferences.
3. Click once on the Privacy & Security option located on the left side of the screen.
4. Click on Passwords
5. In the password manager deselect Remember Passwords to turn the function off.
6. Press Manage Stored Passwords button.
7. Passwords stored will be displayed and the option to remove or remove all will appear.

Turn OFF Password Manager in Firefox:

1. While in Firefox, click on the Tools menu.
2. Choose Options.
3. Choose the Privacy option on the left.
4. Click on Saved Passwords.
5. Deselect the Remember Passwords checkbox
6. Press View Saved Passwords button
7. From here you can delete any previously saved passwords on the computer.

B. Access the Web Mark Entry Page:
   1. Go to the U of R Home page (http://www.uregina.ca)
   2. Point to the ‘Faculty and Staff’, link choose Web Mark Entry.
   3. Underneath the Web Mark Entry v3.0.0 column, click on the “Click here to logon” link

To Log In:
   1. Click in the User ID field.
   2. Type in your 9-digit Banner User ID (employee/student)
   3. Press the tab key or click in the PIN field.
   4. Type in your PIN (Personal Identification Number). Change your Pin periodically for security.
   5. Click on the ‘Web Mark Entry Access’ button. You will now have your Main Menu on the screen.

Note: Once you are in Web Mark Entry DO NOT use the Back button of your browser. Use the navigation buttons on the web page.

C. Entering Grades

To Select a Term (if the term displayed is not the one you want):
   1. In the Main Menu click on Select Term.
   2. Click on the term you wish to work in.
   3. Click the Select button.

To Select a Role (if you have more than one):
   1. If you are both an instructor and a department head/dean or have a proxy to act for someone, you will be asked to select a role. Click on the one that is relevant to what you want to do.

Valid Grades for Web Mark Entry:

<table>
<thead>
<tr>
<th>Grading Mode</th>
<th>Accepted marks in WME</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal</td>
<td>00% - 100%</td>
<td>Percentage Values using minimum of TWO digits</td>
</tr>
<tr>
<td>NP</td>
<td></td>
<td>No Paper - Student fails to write final exam, complete a mandatory component of a course, or has never attended.</td>
</tr>
<tr>
<td>Credit/No Credit</td>
<td>C</td>
<td>credit for hours shown.</td>
</tr>
<tr>
<td></td>
<td>N</td>
<td>no credit for hours shown.</td>
</tr>
<tr>
<td>Pass/Fail</td>
<td>P</td>
<td>pass standing.</td>
</tr>
<tr>
<td></td>
<td>F</td>
<td>failing standing.</td>
</tr>
<tr>
<td>Maintenance of Candidacy</td>
<td>MC</td>
<td></td>
</tr>
</tbody>
</table>

NR (Not yet reported) ** valid with approval of Dean or Designate is an interim grade used when a student’s completion of a course is delayed for reasons intrinsic to the course, or when an investigation or appeal is in progress.

To Enter Marks:
   1. In the Main Menu click on Enter Marks.
2. Click on “by name” OR “by ID” to view the roster.
3. Click in the first Mark field.
4. Type in the mark for the student.
5. Press the tab key twice to get the next mark field or use your mouse to click in it.
6. Save your marks often by clicking the Save Marks button at the bottom of the page.
7. Remember to use the Log off button for security.

To Enter a Note (Optional):
1. Click on the note/line number button for the student.
2. Click in the box on the Note screen.
3. In the note field type the information required by your faculty.
4. Once the note is complete click the “Save Note” button.
5. Click the Class List link to return to the grade roster.

To View the Statistics:
1. While in the Grade Roster go to the bottom of the page.
2. Click on the Class Stats link to view the class statistics.
3. Click on the Class List link at the bottom of the screen when finished.

To View the List of Students Who Have Withdrawn or have been Graded In Banner:
1. While in the Grade Roster go to the bottom of the page.
2. Click the Graded in Banner link.
3. Click back to Class List link at the bottom of the page after you are finished viewing the list.

Note: If a student(s) do not appear please go to the Graded in Banner Link, they should be located there.

To Submit Your Marks:
1. While in the Grade Roster go to the bottom of the page.
2. Re-enter PIN in the space provided at the bottom of the roster, and click the ‘Sumit Marks For Approval’ button. A pop-up message will confirm submission of marks.
3. Once the marks have been submitted you may ONLY view. If you discover and error contact your department head or dean to reject the roster.
4. 48 hours after submitting, their should be a ‘Complete’ indicating that all necessary approvals have been done OR a ‘Reject’ indicating the department head or dean did not approve.
5. **Always remember to use the Log off button for security.**
6. **Always remember to use the navigation buttons on the web site, DO NOT USE THE BROWSERS BACK BUTTON.**

Note: Please be sure to periodically check the status of your submitted grades. Remember that they are not finished until all statuses are labeled “Complete.”

If you have any questions or concerns about recording grades, please contact your dean or designate, the Records Clerk (585-4173), or the Assistant Registrar, Records (585-4176).

Training on Web Mark Entry is provided on request, and at Friday afternoon Drop-In Sessions. Email Computer.Training@uregina.ca for more information, or to schedule a session. Full documentation is available at www.uregina.ca/compserv/training.
SECTION 16
UR COURSES

A. Introduction

UR Courses is based on Moodle. Moodle is a course management system (CMS) and open source software package designed using sound pedagogical principles, to help educators create effective on-line learning communities or enhance face-to-face courses.

UR Courses allows an instructor to easily organize and distribute course materials and grades in a secure environment. It also facilitates communication between the instructor and the students, as well as encouraging discussions among students.

B. Getting Setup to Use UR COURSES

To gain access to the UR Courses system to create or upload course materials, you must have the course initially created for you in UR Courses by the UR Courses Administrator in Information Services. If you are planning on using UR Courses to supplement your course, you must complete a Faculty Course Request Form for the creation of your UR Courses account. To access the form, go to www.uregina.ca/webct. The Technology Learning Centre offers a monthly UR Courses course to get faculty started. UR Courses quick sheets are available at:

All Students registered in a given term will be automatically given access to the UR Courses system, and they will only be able to see the courses that they are registered in.

C. Logging in to UR Courses

To Login to UR Courses:

1. Open the website: http://urcourses.uregina.ca
2. Click the ‘Login to UR Courses’ button
3. Enter your username and password, then click ‘Log in’
   Note: Your UR Courses username and password will be the same as your Novell and Email Login
4. The UR Courses screen will appear different to different users, depending on the options and courses available. Students will only see the courses they are registered in, while Instructors will have the tools to make changes to the course materials.

The Technology Learning Centre offers a number of short videos to get you started. Located at http://www.uregina.ca/compserv/training/manuals/videos.shtml
SECTION 17
LIBRARY SEARCHING: VOYAGER

A. Introduction

The Web Voyager program is an online database search tool used to electronically search the selves of the libraries of the University of Regina, Campion College, Luther College, and First Nations University. Voyager allows you to search the libraries using keywords and is capable of searching by author, subject, and call number.

Voyager is available 24 hours a day, 7 days a week and can be accessed using any web browser, on or off campus.

B. Searching with Voyager

To reach the Voyager landing page:

1. Open a web browser.
2. From the U of R home page: Go to: http://www.uregina.ca/library/
3. Select “Search Catalog” from the libraries drop-down menu.

To search the libraries

1. Click on “Basic Search.”
2. Select your search method from the “Find Results in:” field.
3. Enter the keywords in the “Find This:” field.
4. Select search.
5. A list of possible matches will be displayed. Scroll down to find the correct person (the name may not be at the top of the list, regardless of how accurately you entered it).
Note: If you are searching by keyword, you will likely be taken directly to step 7.

6. Click on the link of the author’s name.
7. A list of the available titles will appear.

8. Each title includes (From left to right):
   a. The author and his/her dates
   b. The title and publication date
   c. Which library the book is in (Dr. John Archer, Campion, or Luther).
   d. The books call number (this will give you the exact location of the book).
   e. The books status (not charged means the book should be on the shelf).

9. To find the book you will now need to copy down the call number and go to that location on the shelf (in the John Archer library call numbers A-M are located on the 3rd floor, and N-Z are on the 4th).
10. Click on the name of the book to see more details.
Antony and Cleopatra; edited by John Inglew. -

Database: University of Regina Libraries
Main Author: Shakespeare, William, 1564-1616.
Title: Antony and Cleopatra, edited by John Ingledew. -
Type of Material: Book

Subject(s): Antony, Marcus, 337-30 B.C. --Drama
Cleopatra, Queen of Egypt, d. 30 B.C. --Drama

Location: ARCHER
Call Number: PR 2802 A215
Number of Items: 1
Status: Not Charged

Location: ARCHER
Call Number: PR 2802 A215
Number of Items: 1
Status: Not Charged

Location: ARCHER
Call Number: PR 2802 A215
Number of Items: 1
Status: Not Charged

11. If there are multiple holdings of the book, you will be able to see them listed.
A. Turning on the System

Determine if system is on:
1. Move Mouse to determine if monitor is in sleep mode
2. If a green light appears, monitor power is on
3. If no green light appears, press the power button on the front of the monitor
4. Check if the computer tower unit has a green light, to indicate power is on
5. If not on, Press the power button on the front of the computer tower

B. Logging in to Windows 7

Since Windows XP Professional is a network based product you must log in each time your computer is booted up. The login username and password are the same as currently used for logging in to Novell.

To login to Windows 7:
1. Hold down the CTRL, ALT and Del buttons on your keyboard
   This will open the login screen
2. Enter your Novell Username and Password
3. Click OK or press Enter
C. Logging off Windows

This will enable another user to log in to the system with their own username, and use the system with their own personalized settings.

1. Click
2. Click the arrow beside Shut down to see more options and choose Log off
3. Click OK
4. The current user will be logged off, and the login screen will appear

D. Shutting down your system

1. Click Start
2. Click Shut Down
3. Click OK
4. The system will Shut Down, and will automatically turn off system power

E. Restarting your Computer

1. Click
2. Click the arrow beside Shut down to see more options and choose Restart
4. Click OK
5. The system will reboot and the initial login screen will appear
APPENDIX B
WINDOWS 7 - NOVELL NETWARE SECURITY MENU

To open the Novell Security Menu:
Hold down Ctrl, Alt and Delete
The Task List Menu will appear

A. Lock/Unlock Workstation

To lock the workstation:  To Unlock the workstation:
Click Lock Workstation  Enter your Novell Username and Password

B. Log Out

To log the current user out of the system:
Click Logout...
The current user will be logged off, and a new login screen will appear

C. Shutdown

To Shutdown the system:
Click Shutdown...
The system will shut down and automatically power off

D. Change Password

To Change your Novell Password:
1. Click Change Password...
2. You will be prompted to enter your old password, then your new password twice
   Note: This password also gives you access to your local account on the machine.

E. Task List

To open a list of tasks currently running on the system:
1. Click Task List...
2. A list of the current applications that are running will appear

To end a task:
1. Click the task you want to end
2. Click the End Task button
   Note: The words ‘Not Responding’ will show in brackets after the task name for a task that is not responding.
F. **Cancel**

To close the Security Menu and return to normal operation Click Cancel
A. Windows Explorer

The Explorer is the main tool for viewing and managing the files and folders on your hard drive, floppy drive, or any other storage medium. Using the Explorer you can do everything from copying a file to another folder to launching an application to examining how much space is available on your hard drive.

To open the Explorer:

1. Click the Start button
2. Point to All Programs, Accessories
3. Click on Windows Explorer

I. Expanding and Collapsing

The left pane of the Explorer is referred to as the directory tree. In Explorer’s terms, the Desktop is the top of the hierarchy with My Computer and all its pieces connected to it. The dotted lines show the connections, like in a flow chart. Folders with plus signs next to them have subfolders. In order to view the subfolders they must be expanded.

To expand a folder:
1. Click on the plus sign in front of the folder you wish to expand

Once a folder has been expanded and its contents displayed the plus sign changes to a minus sign. The minus sign is used to collapse folders contents.

To collapse a folder:

1. Click on the minus sign in front of the folder you wish to collapse

II. Viewing the Contents of a Folder

The right side of the Explorer displays the contents of a folder.

To view the contents of a folder:

1. Click on a folder in the left pane of the Explorer

III. Working with the Explorer Toolbar

The Explorer Toolbar is a collection of icons that provide quick access to the functions on the menus.

From left to right, the functions on the toolbar are:

- Move back or forward to a previously visited folder in the left Explorer pane
- File Path
- Refresh the current folder
- Search the current folder
- Change the view or how the Explorer’s contents appear
- Show the preview pane
- Window’s help and support
IV. Sorting Buttons

The sorting buttons are only visible and accessible in Details view. These buttons allow you to change the order in which the folder’s contents are displayed.

<table>
<thead>
<tr>
<th></th>
<th>Name</th>
<th>Date Modified</th>
<th>Type</th>
<th>Size</th>
</tr>
</thead>
</table>

Click a button to get the following results:

- **Name**: Clicking this button will sort contents in alphabetical order. A second click will sort the files in reverse alphabetical order.
- **Date Modified**: Clicking this button will sort files by the date they were last changed from most recent to oldest. A second click will reverse the order.
- **Type**: Clicking this button will sort alphabetically by type (extension), with folders first, then files. A second click will reverse the order.
- **Size**: When you click the Size button, files will be sorted in ascending size order. A second click will reverse the size order.

B. My Computer

They My Computer icon is on every Windows 7 Desktop. The My Computer utility provides you with the same functionality as the Explorer.

To access My Computer:

1. Double click on the My Computer icon.
C. Working with Folders and File

To manage your files efficiently you’ll need to be know the basics of making and manipulating files and folders, and getting them organized in ways you find comfortable. Many of the commands described below can be used when working with My computer or Windows Explorer.

I. Selecting Files and Folders

Before any action can be taken on an object such as a file or a folder, it must first be selected. Once an object is selected, you can then move or rename or copy the object.

To select a single file or folder:

1. Click once on the file or folder
2. When the file/folder is selected it will appear in reverse color

To select a continuous group of files or folders:

1. Click on the first file that you wish to select
2. Hold down the SHIFT key and click on the last file you want to select

Note: An alternative method for selecting a group of files that are next to each other is to hold down the mouse button and drag a rectangle around the files you want to select. You must start to do this in a white area of the screen.
To select a non-continuous group of files or folders:

1. Click on the first file you wish to select
2. Hold down the CTRL key and click any other files you want to select

To select all the files and folders in the window:

1. Choose Edit from the menu
2. Then choose Select All

II. Creating a New Folder

Folders are used to organize your information in a manageable way. Folders can contain subfolders, shortcuts and/or files. They can be placed on your desktop for easy access or left in your hard drive.

To create a folder:

1. Open the folder in which you want to create a new folder
2. Choose the New folder icon
4. A new folder is now visible on the screen with the title New Folder selected. Simply type a name for the new folder over top of the temporary name
5. Press Enter

III. Copy

Good file management involves knowing how and when to move, copy delete, and rename files and folders. We’ll start with copying files and folders. There are at least three different methods for copying files or folders. You can adopt one method and use it all the time, or you can pick and choose from the various methods. Whatever works for you is the best way. Remember that when you copy a file or folder the original remains where it was a duplicate is created (and perhaps place in a new location).

To copy a file or folder:

1. Locate the file or folder you wish to copy
2. Select the file or folder by clicking once on it
3. Copy the information using one of the following methods:
   a) Choose Edit, Copy from the menu
   b) Click the Copy button from the toolbar
   c) Click with the Right Mouse Button on the file and then select Copy from the shortcut menu
4. Locate the destination folder and open it
5. Paste the file or folder using one of the following methods:
   a) Choose Edit, Paste from the menu
   b) Pick the Paste button from the toolbar
   c) Click with the Right Mouse Button on the window where the copy is be located and then select Paste from the shortcut menu
IV. Move

Remember that when you move a file or folder, it is no longer in the original place it was created.

To move a file or folder:

1. Locate the file or folder you wish to move
2. Select the file or folder by clicking once on it
3. Cut the information using one of the following methods:
   a) Choose Edit, Cut from the menu
   b) Click the Cut button from the toolbar
   c) Click with the Right Mouse Button on the file and then select Cut from the shortcut menu
4. Locate the destination folder and open it
5. Paste the file or folder using one of the following methods:
   a) Choose Edit, Paste from the menu
   b) Pick the Paste button from the toolbar
   c) Click with the Right Mouse Button on the window where the copy is to be located and then select Paste from the shortcut menu

V. Deleting Files and Folders

When you delete a file or folder the Recycle Bin protects the user from over-hasty deletions because the deleted file or folder is not instantly deleted but can be retrieved from the Recycle Bin if you later decide you want it back.

To delete a file or folder:

1. Locate the file or folder you want to delete
2. Select the file or folder by clicking once on it
3. Delete the information using one of the following methods:
   a) Click on the Delete button from the toolbar
   b) Click with the Right Mouse Button on the file or folder and select Delete from the shortcut menu
   c) Click the Delete button on the toolbar
4. Click the Yes button to complete the process

Note: You can also drag file or folder icons onto the Recycle Bin icon.
VI. **Restore**

If you inadvertently deleted vital documents and want to restore them you must get them from the Recycle Bin.

**To restore:**

1. Double Click on the Recycle Bin
2. Select the file(s)/folder(s) you want restored
3. Restore the file(s) using one of the following methods:
   a) Choose File, Restore
   b) Click on the file(s)/folder(s) with the RIGHT mouse key and then pick Restore

VII. **Renaming Files or Folders**

Occasionally you will need to rename a file or folder. If you rename a file be sure that you include the original extension name (such as .doc or .xls) in the new name otherwise Windows may not know what type of file it is and may not be able to create any type of association.

**To rename a file or folder:**

1. Select the file or folder you wish to rename by clicking once on it
2. Rename the file or folder using one of the following:
   a) Click a second time on the name of the file or folder
   b) Right click on the file or folder and select Rename from the popup menu
3. Type the new name for the file or folder
4. Press Enter

VIII. **Undo Command**

When you move, copy or rename something, the command to undo that action is remembered by Windows. And Windows remembers the last action you performed first, the next to last second, and so forth. The most important thing about Undo is to use it as soon as you realize you’ve made an error. You don’t want to continue working and then use Undo because you will undo what you’ve just done and not what you want to undo. So if you do make a mistake, stop and use Undo right away to set things straight.

**To undo an action:**

1. Use one of the following to undo:
   a) Click the Undo button on the toolbar
   b) Right click in a free area of the folder and choose Undo
   c) Choose Edit, Undo from the menu
IX. Finding Files or Folders

It's not at all unusual for even an experienced Windows user to “lose” a file. What this means is that a file is created and saved, but it just can’t be found when the time comes to work with it again. Fortunately Windows comes with a very sophisticated file-finding tool that makes it possible to find almost anything on your hard disk, even if you know very little about it.

The Find tool lets you look for documents based on:

- document name
- the date range the document was modified
- a specific text string inside the document
- the size of the document

To find a file or folder by name:

1. Click the Start button
2. Type your file name, either in whole or in part, in the ‘Search programs and files’

Windows 7 will display a list of files matching the search criteria.