URSA Minor
User guide
After logging in, the Units that are available to administer are shown on the left of the start page.

Note: All links in the URSA interface are orange - not blue.

The Unit settings can be accessed by clicking the U[number] link. Other features are available via the Menu dropdown next to the URKUND logotype.
Choosing Receivers will display a list of all registered users belonging to the unit/s

Individual settings are available via the R-number in the far left column.

Units will display a list of the units available to the administrator, in essence the same as the items on the start page. When clicked, the details of the unit AND the users registered to it will be displayed

If a Receiver number is clicked, the settings of the individual user will be displayed (see below)
The top bar allows for some actions to be taken

[Change] will edit the following

**U693 - Edit**

Properties

- **Email:** pd@univ.fr
- **Contact person:** Pascal Diderot
- **Phonenumber:** +33 03 23 64 44 96
- **Language:** Français

Save  Cancel

This is the contact information that should refer to the person in responsible for URKUND at the organization. The language setting is global and will affect every new user account created after it has been changed. It will, not however, affect existing users.

[OrganizationLevels] lets the administrator set up a hierarchy in up to two levels to which users can be tied. This functionality will be used to facilitate aggregated usage statistics in a later version of URSA Minor.
[Create Accounts] allows the administrator to set up new URKUND users within the organization.

In the box, put in the email address and the full name of the person or persons that needs an account. No titles are required to be filled in during this process.
Multiple accounts can be created simultaneously if entered on separate lines.

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Create Accounts

Paste a list of the Receivers in the text area below, either as a list of mail addresses. Example:

- arne.arnesson@priinfo.se
- berit.beritsson@priinfo.se
- c.caesarsson@priinfo.se

Or a list with the mail address and a name. Example:

- arne.arnesson@priinfo.se Arne Arnesson
- berit.beritsson@priinfo.se Berit Beritsson
- c.caesarsson@priinfo.se Caesar Caesarsson

Only use one space or tab between the email and the name.

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arne.arnesson@priinfo.se Arne Arnesson
berit.beritsson@priinfo.se Berit Beritsson
c.caesarsson@priinfo.se Caesar Caesarsson
```

Click Next when ready

The next step is to tie the accounts to their Organization Levels, if desired, and then make a final check of the entries so that the email addresses and the names are in the correct boxes. Note that commas or spaces in email addresses may shift the subsequent text into the name column.

Click Next when ready
Select the Organization levels, if any apply, and decide if the users should receive the standard Confirmations of Registration from URKUND sent to the users, leave the check in the box.

The white boxes can be changed before the account is created but the grey boxes are locked. Click Next when ready.

If there are any problems detected, such as duplicate accounts or invalid email formats, the process will halt requiring any errors to be corrected before proceeding.

The created accounts are displayed afterwards. Note that this is the only time and place that the passwords are accessible to the administrator.
[Statistics] has three options

- **Statistics**
- Statistics for receivers per month
- Statistics for each receiver per year
- Export Receivers

**Statistics for receivers per month** will show the aggregated number of documents per month per year since the unit started using URKUND.

![Statistics for receivers per month](image)

**Statistics for each receiver per year** will show how many documents were submitted to each user.

![Statistics for each receiver per year](image)

These statistics can be exported to a CSV file and then opened in Excel. The [Export Receivers] option in the dropdown will generate a CSV of all the users in the organization.
Receivers (RXXXXXXX) can be accessed either via the list where the unit is displayed, via the [Receivers] menu option or via the free text search box. The search box works either by typing the exact desired name or address or with a wildcard at the end of the search word, which need not be complete. For example, a search for simo* will result in any user with these characters being displayed.

When opened, the Receiver card will display the individual settings for the user, of which some may be edited by the administrator via [Change], as well as any Source filters that may have been used.
The fields that can be edited are

(The settings are normally administrated by the users themselves by logging in at www.urkund.com)

A few notes on the options:

[Language -- ] means that the standard language of the Unit is used

[Send confirmation e-mails Null ] is the standard setting and means yes. This is edited in special cases

[Search in archive] and [Search in own archive] should be left checked for complete source coverage

[Change SourceFilters] lets the user or administrator add or remove Internet URLs from the searches made on documents submitted to the individual account. Please see the URKUND User Guide for a complete description on how they work.