ZyLAB

Student Administration

Electronic Document Management
ZyLAB User Manual
**Foreword**

This document outlines the correct procedures for scanning, retrieving and processing documents using ZyLAB and all associated packages. A user will only be able to view/action information appropriate to their position. If for any reason a user believes they cannot access any index/documents required to perform their role, they should have their manager contact the ZyLAB Operating Officer\(^1\).


As indicated above, an initial set of operating procedures has been developed for using ZyLAB. However, after the initial roll out, each section in Student Administration will need to review its operating procedures and amend them accordingly. Each Section is required to submit its business procedures for scanning to the ZyLAB Operating Officer for reference. Given that this is a new development, it presents an opportune time for each section to review its document handling and to ensure that we develop a **CONSISTENT** approach to the scanning, authorising, storage and retrieval of documents. Part B of this document is the draft ZyLAB Processes Document.

**Part A: Overview**

1. **Background**

Netlor Pty Ltd has been contracted to provide ZyLAB software for use in connection with the electronic storage and processing of hard copy student information as part of our Electronic Document Management Project. This functionality will achieve efficiencies of time and space and avoid the necessity of sending documents between campuses.

One of the most important aspects of the project is to establish the file structure for the indices (folders) to which documents will eventually be scanned; as well we need to define the Metadata Fields (Document Key Fields) for each tagged document. In establishing the file structure, it is important to realise that eventually all documents, not just documents relating to students, may be filed using the ZyLAB software. An extended detailed file structure for the processing and storing of scanned student files has been developed but in the initial rollout will not be used.

The ZyLAB software enables differing levels of security; thus not all staff will be able to access all indices. The file structures in ZyLAB are called indices and can be seen as folders in which documents are stored, in much the same way we now store documents, in folders, on our own PCs or in filing cabinets. While ZyLAB has the facility to import electronic documents for storage and retrieval, during the initial stages of the Project we will not be using this feature; rather we will be scanning hard copies of documents to the relevant indices. It is expected that as we develop more confidence and skills in using ZyLAB that we will start to store electronic documents, including emails.

A major function of ZyLAB is the Meta Data Fields that can be attached to documents. These fields can be defined for each tagged document and allow the relevant section to undertake the processing of this

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\(^1\) The “ZyLab Operating Officer” is located in Student Systems.
document and record the outcome. Each Section has developed a series of Meta Data Fields (commonly referred to as Document Key Fields – DKF) which are attached to each document tag. However, in the initial roll out of ZyLAB we will not be processing documents using the Meta Data Fields. It is expected that in stage two of the roll out documents will be scanned before being processed.

2. Our Approach to the File Structure
The approach taken for holding our scanned records uses a combination of an archive and functional classification system. This is preferred over an organisation classification, as the functions (of an organisation) are usually more stable than organisational structures. All documentation, in the initial roll out, is to be scanned to the Archives or Misconduct or Scholarships index as appropriate.

2.1 Disposal
A disposal policy and schedule consistent with the ACU National Retention and Disposal Schedule is being developed.

2.2 Security
Staff are reminded that access to ZyLAB requires approval and that at all times they should ensure that their access to ZyLAB via username and password is not shared with others. All information accessed through ZyLAB is to be handled in line with the ACU National Privacy Policy, Student administration Privacy Policy and Student Administration Confidentiality of Student Records Policy.

3. Initial Rollout of Web Version of ZyLAB
The initial roll out of the Webserver version of ZyLAB has been rolled out to the desk tops of Student Administration Staff. All current (November 2007) student files have been scanned. Past years student files have been scanned by Netlor on our behalf. All scanned files (including archived files – previously scanned records) are accessible via the web with the initial roll out of ZyLAB. These files, however, have no associated document tag. This means that, when looking at a list of documents from a student file, the displayed document list does not contain document descriptions. This means that staff may have to review more than one document before finding the document they seek.

ZyLAB is to be used for the scanning of student files/records. A cover sheet is produced for each document or group of documents (e.g. base admission application) being scanned. Document Tags are automatically loaded for Student Administration forms by the bar code, normally located in the left top corner, of Student Administration forms. If a document is not tagged at the time of scanning, a Super User may be required to add the appropriate document tag to the scanned document via a desktop version of ZyFIND.

It is important to remember that the move to holding student documentation electronically is, in part, driven by the fact that new students entering the University in many cases only have an electronic file on Banner and will never have a physical student file. A major benefit of the ZyLAB roll out is that documents, which previously needed to be faxed or sent between campuses, can now be accessed electronically from a staff member’s desk, thereby not only improving turnaround times for decisions, but also access by staff across campuses.
4. Hardware Configuration

The suggested hardware configuration for ZyLAB is:

- Super Users and Sys Admin
- ZyLAB Web Server and database
- Photocopiers/scanners
- Student CANs held in ZyLAB
- Student Administration staff
- Academic staff read only access
- Student Connect
- Senior University staff read only access
- Academic staff read only access
Part B: Operational Procedures

1. Software Installation

All staff granted access to ZyLAB (Student Records) will receive an email from the ZyLAB Operating Officer, supplying:
1. A ZyFIND icon
2. Installation instructions
3. User name and password
4. Login instructions.

The Icon supplied to each user/user groups may differ due to the differing roles of staff. Whilst security is built into all web clients, it is preferable that the URLs are not shared.

1.1 ZyFIND Installation instructions

Right click on the icon contained in the email.
Select "Save..." from the pop up menu.
Select "Desk top" from the save attachment pop up.
You have now installed ZyFind webclient to you desktop.

1.2 Logging into ZyLAB

User name is the user’s system login e.g. acustaff\adjay
Password is the same as the user’s system login
Click OK
Once again enter your system login and password. Press Register.

You are now logged into ZyLAB.

1.3 **ZyImage Screen Scraper**

ZyImage Screen Scraper is loaded at the PC level and requires the user to set parameters (including specifying function keys). This add-on allows users to coordinate searching within ZyFind from external sources such as Excel, Banner, or any other Microsoft based software. A detailed installation set up manual and user manual will be distributed in due course.
2. User roles and security levels

All users will be assigned access rights appropriate to their role. Categories of access include:

- View only
- Super User access.

Users may have different rights on different indices.

Currently the only Indexes having blocked access (viewing rights) for all Staff (unless authorized by the Academic Registrar) are:

- Misconduct
- Scholarships

Other than the indexes above all staff both from Student Administration and other areas of the University will be able to access all Archive files (Student Records)

2.1 Super User’s Role

Staff with Super User access are able to amend information held on a scanned document. Any such amendments must be made in accord with these procedures. However, no information should be changed without the relevant Manager approvals.

a) Approvals from Course Co-ordinators.

i. Super Users are able to record the name and date of approval by the Course Coordinator/Head of School for the following documents:

ii. Applications for Credit

iii. Academic Waiver

iv. Cross institutional Enrolment

v. Change of Major

vi. Late Addition of Unit.

b) Change of Name

Super Users are able to record a change of name in original scanned documents.

c) Correcting errors

Super users at Student Systems will be responsible for making changes to a scanned document where an error is identified. For example, two students’ records have been scanned together without the use of a separator page, creating one file. When identified, the user would email the file name to Student Systems with the requested changes. Other examples of scan errors would include a file without a student cover page, a document scanned to the wrong indices.

2.2 List of Super Users

The proposed allocation of the University’s 10 Enterprise Web server licences is:

- Timetabling Examinations and Results one,
- Information Resources Management one,
- Student Systems two,
- Enrolments two,
- Fees one
- Admissions two,
- Research Services one.

2.3 Academic Access

Academic staff are granted access to ZyLAB on an individual user basis. Academics wishing to gain access to ZyLAB need to submit a Request for Academic Access to ZyLAB to the ZyLAB Operating Officer (Refer to Appendix F).
3. Retrieving/Viewing a Document

3.1 Simple search
To search for a stored document in ZyLAB, double click on the ZyFIND icon, and login to ZyFIND.

Enter the desired search criteria into the search box, located on the upper left side of the screen.

Three documents have been located using the search criteria of S00039893. Click on the document in the results list to view the document.
3.2 Search an Index

It is possible to search the contents of ZyFIND in its entirety, or to localise your search to an index if you are sure of the location of a document.
### Extended Search Options

**Wild card ? *  
? replaces one character.  
* replaces zero or more characters.**

<table>
<thead>
<tr>
<th>Example of query</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>b?rn</td>
<td>born, barn, burn</td>
</tr>
<tr>
<td>?andy</td>
<td>candy, dandy, sandy</td>
</tr>
<tr>
<td>sh??e</td>
<td>shore, shade</td>
</tr>
<tr>
<td>60?</td>
<td>600, 601, 602, 603, 604, 605, 606, 607, 608, 609</td>
</tr>
<tr>
<td>*most</td>
<td>most, almost</td>
</tr>
<tr>
<td>auto*</td>
<td>auto, automobile, automotive, autobiography, autocracy, autograph</td>
</tr>
<tr>
<td>auto AND automo*</td>
<td>auto, automobile, automotive</td>
</tr>
</tbody>
</table>
Fuzzy search

Use Fuzzy search to find all occurrences of a word, including the ones that were not recognised correctly by the OCR engine. You can choose from 4 fuzzy degrees (the degree of closeness to your query).

<table>
<thead>
<tr>
<th>Example query</th>
<th>Fuzzy degree</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>computer</td>
<td>0</td>
<td>computer</td>
</tr>
<tr>
<td>computer</td>
<td>1</td>
<td>computer, commuter, compute, computter</td>
</tr>
<tr>
<td>computer</td>
<td>2</td>
<td>computer, commuter, compute, computter, computw, cumpoter, comput</td>
</tr>
<tr>
<td>computer</td>
<td>3</td>
<td>computer, commuter, compute, computter, computw, cumpoter, onputer, cumpotor, oncputter, compu</td>
</tr>
<tr>
<td>computer</td>
<td>4</td>
<td>computer, commuter, compute, computter, computw, cumpoter, onputer, cumpotor, oncputter, cncpoltcr, oompotor, cunnputcr, comp</td>
</tr>
</tbody>
</table>

It is recommended that for most searches you only need to set the fuzzy degree of 0 or 1.

Search within last results

Using the Search in Last Results option, a user can refine their search criteria to documents found in a previous search.

Search in documents

Using the Search in document function, a user can find data within a document already located. This is of great use when viewing a large student history file.

Concept search

A concept search is a stored set of criteria used for common complex searches. User’s can program their own concepts to match their needs. Users requiring assistance with stored concepts should contact the Super User in their section in the first instance.

Searching on Document Key Fields

A field search allows a user to search for details contained within the Document Key Fields. This search does not look for the search criteria within the document.
Enter search criteria into the available Document Key Fields

Use Advanced Search Options to define the and/or operators. Use the Clear button to reset the search values to blank.

**Boolean operators: AND, OR, NOT**

<table>
<thead>
<tr>
<th>Boolean operator</th>
<th>Recommended use</th>
<th>Example of query</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>OR</td>
<td>Broaden your search and look for terms that have similar meaning, or refer to similar subjects.</td>
<td>car OR transportation</td>
<td>car, transportation, car, transportation</td>
</tr>
<tr>
<td>AND</td>
<td>Narrow your search and look for terms that have different meanings.</td>
<td>new england AND north dakota</td>
<td>new england, north dakota</td>
</tr>
<tr>
<td>NOT</td>
<td>Narrow your search and look for documents that do not contain the word after NOT.</td>
<td>NOT cars</td>
<td>bikes, boats, anything but</td>
</tr>
<tr>
<td>AND NOT</td>
<td>Narrow your search and look for a term that is often connected to your search.</td>
<td>leaf AND NOT tree</td>
<td>leaf</td>
</tr>
<tr>
<td>AND NOT</td>
<td>Used cars AND NOT cars</td>
<td>No results</td>
<td></td>
</tr>
<tr>
<td>AND NOT</td>
<td>(cars) AND NOT used cars</td>
<td>cars</td>
<td></td>
</tr>
<tr>
<td>OR NOT</td>
<td>Used cars OR NOT cars</td>
<td>No results</td>
<td></td>
</tr>
<tr>
<td>OR NOT</td>
<td>(cars) OR NOT used cars</td>
<td>cars And all documents that do not contain the phrase &quot;used cars&quot;.</td>
<td></td>
</tr>
</tbody>
</table>
Positional operators: Context related
Use Positional operators to ensure that your search terms are contextually related. This is especially useful when searching long documents.

<table>
<thead>
<tr>
<th>Positional operator</th>
<th>Recommended use</th>
<th>Example of query</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>WITHIN: W/n</td>
<td>Limit your search to words that appear within a defined range (n (max. 16382)) in either direction.</td>
<td>client W/6 complaint</td>
<td>&quot;The client was determined to file a complaint.&quot; &quot;A complaint was filed by his client.&quot;</td>
</tr>
<tr>
<td></td>
<td>blue sky w/10 green grass w/10 clear water</td>
<td>From high in the blue sky, he could see the green grass and the sparkling clear water of the sea.&quot;</td>
<td></td>
</tr>
<tr>
<td>W/n/EOS (sentence)</td>
<td>Minnesota W/3/EOS Maine</td>
<td>Minnesota appears within 3 sentences of Maine, and vice versa.</td>
<td></td>
</tr>
<tr>
<td>W/n/ EOP (paragraph)</td>
<td>Minnesota W/3/EOP Maine</td>
<td>Minnesota appears within 3 paragraphs of Maine, and vice versa.</td>
<td></td>
</tr>
<tr>
<td>W/n/EOG (page)</td>
<td>Minnesota W/3/EOG Maine</td>
<td>Minnesota appears within 3 pages of Maine, and vice versa.</td>
<td></td>
</tr>
<tr>
<td>Precedence: P/n</td>
<td>Find terms in a specific order.</td>
<td>education P/100 fitness</td>
<td>Education precedes fitness within 100 words.</td>
</tr>
<tr>
<td>TO</td>
<td>Search for occurrences of a term falling between two other terms.</td>
<td>blue TO green {red}</td>
<td>&quot;Blue and red and green.&quot; Only red is highlighted, blue and green function as start and end delimiters.</td>
</tr>
</tbody>
</table>

Precedence and parentheses
When you use two or more operators, the order in which these operators are executed is determined by operator precedence. You can override this order by using parentheses (grouped terms). Contents within parentheses are interpreted as one unit. Always use parentheses in complex search statements (more than two operators).

The following operator precedence is executed:
1. NOT
2. OR
3. W/n, P/n (these operators are of equal precedence)
4. AND
5. TO
Examples | Results
---|---
(car AND sales) OR car dealer | Files with cars and sales are retrieved.
- From that group, files with car dealer are selected.

(disk drive AND printer AND modem) OR (sales AND revenue AND profit) | Files with all terms from at least one set of parentheses are retrieved:
- disk drive, printer, modem
- disk drive, printer, modem, sales, revenue, profit

((cars AND trucks) OR trains) AND (ships OR submarines) | Only files with terms from both sides are retrieved:
- cars, trucks, ships, submarines
- cars, trucks, ships
- cars, trucks, submarines
- cars, trucks, trains, ships, submarines
- cars, trucks, trains, ships
- cars, trucks, trains, submarines

chicago OR los angeles AND new york = (chicago OR los angeles) AND new york | Remember: OR precedes AND.
- chicago, new york
- los angeles, new york
- chicago, los angeles, new york

chicago OR (los angeles AND new york) | Parentheses override precedence.
- chicago
- los angeles, new york
- chicago, los angeles, new york

**Number range operator**
You can use these math operators in number range searches:
- `<` less than
- `<=` less than or equal to
- `=` equal to
- `<>` not equal to
- `>` greater than
- `>=` greater than or equal to

Example of query | Results
---|---
"60615" | 60615
60615 | 60615, 606154, 060615, etc.
>=65 w/10 social security | Number 65 or higher within 10 words from social security.
> 21 AND high school graduate | 22, high school graduate
23, high school graduate
etc.
>1 : <10 | All values between 1 and 10.
1,000000000001
2
3,333333
9,999999999999
Searches of this type take time to execute. A lack of system resources may cause the search to error out.
< 5 | Documents without value 5 are retrieved.
is identical to NOT 5

\[\text{ACU ZyLAB Process and Procedure Guidelines} \]
\[\text{Last Review Date: 7 November 2007 – Rollout stage 1} \]
\[\text{Last Update Date: 7 November 2007} \]
Quorum operator
Use Quorum operators to search for a specified number of terms within a search statement.
\( n \) of \{term, term, ...\}

<table>
<thead>
<tr>
<th>Example of query</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 of {history, english, social studies, french, dutch, german}</td>
<td>history, social studies dutch, german etc.</td>
</tr>
<tr>
<td>1 of {blue, green, red} equals blue OR green OR red</td>
<td>blue green red</td>
</tr>
<tr>
<td>3 of {blue, green, red} equals blue AND green AND red</td>
<td>blue, green, red</td>
</tr>
</tbody>
</table>

Separators
Use Separators to limit a search to a physically defined range of a text file. Separators are very useful when combined with the TO operator.

You can use these separators:
- EOP end of paragraph
- EOG end of page
- EOS end of sentence
- EOL end of line
- EOG end of page

<table>
<thead>
<tr>
<th>Example of query</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>experience TO EOP {\text{\text{\textit{(driver or chauffeur) and ( \geq 3 )}}}}</td>
<td>Locates resumes of persons with a minimum of three years' experience as a driver.</td>
</tr>
<tr>
<td>EOP TO EOP {economic and policy}</td>
<td>Locates a single paragraph that includes both economic and policy.</td>
</tr>
<tr>
<td>&quot;EOG&quot;</td>
<td>EOG</td>
</tr>
<tr>
<td>EOG</td>
<td>Retrieves all files with an End Of Page marker, which is, of course, every file.</td>
</tr>
</tbody>
</table>

Search rules and conventions
- Operators are placed only between search terms, except NOT.
- NOT can be placed at the beginning of a search statement, but never at the end.
- Two operators cannot appear in sequence, except NOT (AND NOT, OR NOT).
- Operators are noise words. Therefore, you cannot use them as content words. The search statement and OR will not be accepted.
- Uppercase and lowercase letters are considered identical. We show operators in upper case for emphasis and clarity.
- An operator can appear more than once in a search statement.
- The \text{W/n} operator must include an integer in the range 1 to 16382, followed by a space and a content word.
- You can use one term to retrieve both the hyphenated and non-hyphenated spellings of a term; for example, the search term:\text{database} retrieves database and data-base, but not data base.
● **data-base** retrieves data-base, but not database and data base
● **data base** retrieves data-base and data base, but not database.
● Searches with duplicate words in series also find single occurrences of that word; for example, the search statement, **sing sing**, would find single occurrences of **sing** as well as the phrase, **sing sing**.
● Words with normally appearing hyphens are recognised, for example, Winston-Salem.
● All printable characters in the ASCII character set are recognised.
● A sentence-ending period and other trailing punctuation marks are ignored, when a space or a carriage return follows. Periods are recognised when followed by a character, as in I.B.M. or in 292.004. Apostrophes are treated as null characters, and ignored.
● **fdate**: The date of a file can be searched with the **fdate** operator.
● **fname**: The file name of a document can be searched with the **fname** operator.

### 4. Scanning protocols

All Student Administration Sections have been provided with access to a Fuji Xerox 286 Document Centre or C250 Document Centre. These have been configured to allow users to directly archive documents to Archives Index. It is intended initially that only student related materials be stored within ZyLAB.

#### 4.1 General rules

- All copiers are set to remotely to ZyLAB requirements
- All copiers are set to 300DPI image quality
- Do not scan the instruction page of ACU forms (unless the student has written information on it).
- All documents should be date stamped at the point of receipt.
- All student files must have a cover sheet containing the student barcode for SZABARC. Where a student is pre-Banner, a cover sheet with the student’s name, student number and date of birth is required.
- **Note**: If more than one form or document for a student is to be scanned, each document scanned must be preceded by the cover sheet. For example if a student submits both a WEF and a Change of Major form each needs to have the cover sheet produced and scanned. Failure to use two separate cover sheet means that both forms would be scanned as one document. Therefore where documents for a particular student are **NOT related to they should be separately scanned**
- **An original** separator page is required to be placed between each student record to be scanned (see Appendix A).
- Scan and place into a folder/box each day, with a divider, indicating the scanning date.
- Each Friday shred/security pulp the file/box of scanned documents relating to the previous week, or as determined by the Disposal Schedule (refer to Section 10 of this document);

  **Exceptions**:
- Hard copies of **Changes of Grades** are to be stored for 6 months from the date processed.
- **Original Testamurs** and **Transcripts of Results** must not be destroyed. All original testamurs and academic transcripts of results should be returned to applicants after being scanned into ZyLAB.

#### 4.2 Action

- Stamp the document as received (with the date received)
- Print the student barcode sheet.
All documentation relating to a student is scanned with a cover sheet. Pre-Banner students must have a cover sheet containing the student's name, student number and date of birth. Students with a Banner record require a barcode to be produced from SZABARC. **NO DOCUMENTATION FOR ANY STUDENT** is to be scanned without first scanning the cover sheet. Where multiple scanning is required, the cover sheet must be scanned before each separate document or group of documents is scanned. An original separator page is to be used between each file. This page should be printed on coloured paper and can be re-used (refer to Attachment A).

- Where more than one student's form/file is to be scanned at a time, a separator page must be inserted between each student as well as including the Cover Sheet. (Separator pages can be re-used, and should be printed on green paper for ease.) A separator page is available in Attachment A.
- Log into your Document Centre using the appropriate PIN. Either a Fuji Xerox 286 Document Centre or C250 Document Centre is located for access by each Student Centre, Admissions, Timetabling Results and Examinations, Information Resources Management, Enrolments and Fees and Scholarship's Office Sections. Using the keypad of the Fuji Xerox 286/C250.
- From the “All Services” menu, select the button “Scan to Mailbox”. Select the Index to which the document(s) are to be scanned. (During stage 1, only the archive button should be used – unless you are scanning to the Misconduct or Scholarships indexes). Each Document Centre has an “Archive” button. This will directly send any document to the Archives index. The Archives index will be used to store Student Files, and forms already processed. All other buttons (by function name) will be used for unprocessed forms in Stage 2 of the ZyLAB roll-out.
- Place the documents face up in the document feeder; press the print button, the document(s) will now be scanned.

5. **Forwarding a document**

With the introduction of ZyLAB, it is no longer necessary to send (or fax) a document from one Section to another Section of Student Administration or to the wider University community. The ability for a user to look at a file in Melbourne at the same time a user views this file in Queensland, creates a greater flexibility and access to information for all users. Viewing of any documentation held by ACU should strictly adhere to ACU’s Privacy Policy, which is available at http://my.acu.edu.au/studentadmin/legal/privacy/

5.1 **Forwarding a document to a ZyLAB User**

All Student Administration staff have been granted access to ZyFIND. A user will only have access to indices pertaining to their role. When one Section needs to discuss a ZyLAB file with another, an email containing the file name and student number (in the subject line) is appropriate. This email will then constitute evidence/approval/declination upon its return.
5.2 Forwarding a document to a Non-ZyLAB User

Academics are granted access to ZyLAB on an individual user basis. Academics wishing to gain access to ZyLAB need to submit a Request for Academic Access to ZyLAB to the ZyLAB Operating Officer (refer to Appendix F). Please limit any printing of documents contained within ZyLAB.

When a Section needs to consult with an academic regarding a document in ZyLAB, the following procedure should be followed:

- Find the document for consultation.
- View the document for consultation.
- Click on the PDF icon.
- Select the “Attach to email” icon.
- Select “Send copy”.
- This document will automatically be attached to a new email.
- Any forwarding of documentation from ZyLAB should include the student’s name and student number in the subject line.
6.  Printing

As all documents contained within ZyLAB once existed in a paper format, it is resource intensive and wasteful for users to print a stored document. Users are requested to examine the need to print prior to printing. As a consequence of this the print button has been removed.

Where a user can justify printing a stored document (for example when a student’s file is required for evidence in a court case), the user can use the PDF option.

**Action**

- Open the document to be printed,
- Click on the PDF button on the menu bar
- Click on the print button on the PDF menu bar

7.  Personal settings

ZyFIND allows users to set some of the search options at a user level. The screen dump below shows all settings that can be manipulated at a user level.

All settings on this menu can be set by the user to suit the individual’s preferences.

**Look for**

- ZyImage query
- All Words (automatically AND operators are inserted between the words)
• Any Word (automatically OR operators are inserted between the words)
• Exact Phrase (automatically all words are quoted)

**Date**
Select a date to define the search period.

**Results per page**
Select the maximum number of files you want to display in the View Page.

**Control which page will be viewed first**
Choose whether you want to view the first page of a file, or the first hit within a file.

**Rank Search results on**
Define the way files are ranked. You can choose between number of hits, hit density, file size, file date, comment, file name and file path.
Choose between ascending and descending order.

**Choose what to display**
Choose the files you want displayed: images and/or original format.
Specify whether search statements must be highlighted, and whether the document properties must be shown.

**Choose image quality**
Choose the image quality. You can choose between low, medium, high, 200% enlarged, 280% enlarged, 400% enlarged and TIFF.

**Load default settings**
With the load default settings button the original settings are restored.

**8. Altering stored data**
With the exception of a super user, it is not possible for users to alter stored metadata (Document Key Fields), remove, delete, split or merge documents. Where an error is discovered within the metadata (tagging of a document) or within a scanned file, the user should notify the ZyLAB Operating Officer of the file name and recommendation for changes.

**9. Creation of Free Text Description**
In order to ensure that each document relating to a student is correctly scanned and stored, the following steps are to be undertaken. If a Document Tag is not available then consult with ZyLAB Operations Officer. He/she will advise whether a new Document Tag will be created or whether a Free Text Description will be needed. If a Free Text Description is needed, please complete. The form in Appendix G A Super User is able to add, delete, change and create new Indices, Activities, Subjects and Document Tags, as well as adding a Free Text Description to a document after it has been scanned (whether tagged or untagged). In the initial rollout ONLY Student Systems staff are permitted to create a new Index, split or amend documents.

The ZyLAB Operating Officer will search for the document in ZyLAB, and having found the document, add the free text in the field provided and refile the document. The document can be found by searching ZyLAB using the information provided on the Document Free Text Instruction Sheet. After the free text has been added, the document should be placed in the scanned documents file for later destruction. Refer also to 5.2 Forwarding a Document To a ZyLAB User.

---

2 Initial roll-out only; thereafter, Manager, Information Resource Management.
10. Disposal Schedule

The ACU Retention and Disposal Schedule allows the destruction of the paper record of the student history file and its recording electronically provided we comply with the Evidence Act 1997 (all states) as amended and satisfying the archival film standards of the Archive Office of the relevant State. The Head, Student Business Services is developing a Document Destruction Policy.

All scanned paperwork should be date stamped prior to scanning and disposed of securely on a biweekly basis.

The exceptions to this rule are:

- Original **Testamurs** should be removed and returned to the student
- Original **Academic Transcripts** should be removed and returned to the student
- Original **Change of Grades** are required to be kept in a physical file for 6 months after processing, and then destroyed.
- Any allegation or evidence of criminal activity needs to be kept physically until the Statute of Limitations expires (different for each state).

Each Section is required to submit to the Head, Student Business Services an intended Disposal Schedule meeting both the Section’s needs and University policy.

All ACU Student Administration staff should be aware of ACU’s:

- Student Administration Records and Archive Management Policy and

11. Hot Keys

**General**

- Enter: Search

**ZyRESULT**

- CTRL+P: Print file(s)

**ZyVIEW**

- TAB: Next hit
- SHFT+TAB: Previous hit
- HOME: First page (images only)
- END: Last page (images only)
- CTRL+P: Print file
- Page Up: Go to next TIFF or next text screen
- Page Down: Go to previous TIFF or previous text screen
- CTRL +: Zoom in
- CTRL -: Zoom out
12. **Acronyms**

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACU</td>
<td>Australian Catholic University</td>
</tr>
<tr>
<td>DKF</td>
<td>Document Key Field</td>
</tr>
<tr>
<td>SID</td>
<td>Student Identification Number</td>
</tr>
</tbody>
</table>
Appendix A – Separator page

Appendix B – Button functions

Previous page

Previous page with hit

Previous Document. Allows a user to view the previous document in the results list without returning to the results list.

All pages

All documents (results list)

Next document. Allows a user to view the next document in the results list without returning to the results list.

Next page with hit
A fuzzy search can locate all occurrences of a word, plus all other words that are close in spelling to the original word. The fuzzy level determines the degree to which ZyFIND will look.

Select the Contents tab to obtain a full list of the table of contents

History – Allows a user to view their search history (if enabled at the user level)

Concept search. A concept search is a set of predefined parameters for a search that is performed regularly. Concepts can be created and stored at a user level.

Field search. Allows a user to search on metadata fields (Document Key Fields).

Options. Allows a user to set their options. See Advanced Options screen dump below.

Allows a user to view the contents of their document basket. See Document Basket screen dump.

Log out as this user

Help button. Displays a comprehensive help system.
Appendix C – Barcodes to be attached to incoming correspondence

The following barcodes are designed to be printed on Avery DL45 stickers. These barcodes are to be placed on incoming correspondence identifying the section to which they are to be delivered within ZyLAB.

Academic Matter

![Barcode]

Complaint/Grievance

![Barcode]

Client Services Issue

![Barcode]
Appendix D – Barcode Format

All barcodes used in ZyLAB are code 39 with no check digit. This matches the format of barcoded student cover pages produced from SZABARC. No other format of barcode should be used. Ad hoc barcodes can be produced at http://www.idautomation.com/java/linearservlet.html ensuring that the correct barcode format is used.

Appendix E - Document Key Fields

Document Tags and Meta Data Fields/Document Key Fields
Listed in this section are the details of each of the document tags and Meta Data Fields (Key Document Fields) determined by each Section in Student Administration. In most cases the document tag and associated Key Document Fields are automatically loaded when a document is scanned. This is done through the use of a pre-printed barcode that appears on most forms and other documents regularly used by Student Administration. Incoming correspondence will be tagged using a sticker barcode to determine the appropriate In-Box. Other documents do not have a pre-determined barcode and as such
require a document tag to be added after scanning. Only a super user will have the rights to add a document tag after scanning.

Details of each document tag and key document fields (metadata fields) are provided below.

For all documents identified, the date scanned and location scanned are automatically populated fields.

**Document Tag Descriptions**

Below are the details of each of the document tags (including a depiction of the relevant barcode) and the associated Key Document Fields as determined by the relevant Section of Student Administration. The appropriate barcode is placed electronically on all Student Administration forms prior to their being placed on the ACU website.

Note: The barcodes supplied should not be edited apart from removing the number.

This section includes details of:
- Drop down menus developed
- Barcodes for each form under the metadata fields
- Barcodes for each folder that is non-form based (i.e. folders 9 through 16)

The use of a standard set of drop down menus enables staff to process a scanned document without the need to make notations on the original hard copy. The drop down menus are described below.

**Drop down menu values**

- **Drop down list no. 1** - Default no value/Yes/No
- **Drop down list no. 2** - Default no value/Yes/No/Not Applicable
- **Drop down list no. 3** - Default no value/CSP/Dfee
- **Drop down list no. 4** - Default no value/CSP/Dfee/Conditional
- **Drop down list no. 5** - Default no value/CSP/Dfee/Ineligible
- **Drop down list no. 6** - Default no value/Psychology/Postgraduate
- **Drop down list no. 7** - Default no value/Approved/Declined
- **Drop down list no. 8** - Default no value/Approved/Declined/Not Applicable
- **Drop down list no. 9** - Default value Received/Processed/Incomplete form
- **Drop down list no. 10** - Default Prior to census/Within 30 days after census/> 30 Days after census
- **Drop down list no. 11** - Default no value/$50.00/$150.00/$200.00/Waived
- **Drop down list no. 12** - Default no value/Student Admin/Library

Document tags and the application of Key Document Fields are detailed below together with a depiction of the relevant barcode.

1.1 **Base Application**

![Barcode Image]

1.1

1.2 **Transfer Course/Campus/Fee Status**
1.3 Individual Unit Studies

1.4 Re-admission for Terminated/Excluded Students

1.5 Cross-institutional Study

1.6 UniAccess Australia

1.7 Deferment of Offer

1.8 Elite Athlete Scheme

1.9 YS Form - Bachelor of Social Science (Youth Studies) – Same as 1.8
1.10  GV Form - Graduate Diploma in Education (Secondary) and Master of Teaching (Secondary) – Same as 1.8

1.11  CA Form – Bachelor of Arts (Creative Arts) – Same as 1.8

1.12  Letter of Support – Same as 1.8

1.13  Transcript of Results

1.14  Referee Reports – Same as 1.8

1.15  Work History - Same as 1.8
1.16 Other - Same as 1.8

1.17 Honours Supplementary Information - Same as 1.8

1.18 Supplementary/Supporting Documentation

1.19 A Form – Additional Information ATSI Direct Applicants

1.20 H Form – Additional Information DipEd & Bed (Habilitation)

1.21 Results Release Letter MPsysc DPsysc

1.22 N Form – Postgraduate Nursing Additional Information (Clinical Nursing)
1.23  S Form – MTeach GDipED NSW/ACT/QLD Additional Information

1.24  XH Form – Cross Institutional Home Institution Approval

1.25  Master/Doctor Psychology Academic Referee Report

1.26  Master/Doctor Psychology Professional/Personal Referee Report

1.27  Psychology Honours PGDip Results Release Letter 2007

1.28  HE Form – Additional Information Grad Cert Higher Education

1.29  DCS Form – Additional Information Grad Cert Catholic Studies National Online
1.30 M Form – Postgraduate Nursing Additional Information (Midwifery)

1.31 ISD Form – Inclusive Education and Disability Studies – Add Info

1.32 PR Form – Permanent Residency Transfer Application
### 2.1 to 2.10 Correspondence Inward

<table>
<thead>
<tr>
<th>Academic Matter</th>
<th>2.11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Services issue</td>
<td>2.12</td>
</tr>
<tr>
<td>Complaint/Grievance Response</td>
<td>2.13</td>
</tr>
<tr>
<td>Enrolment Issue</td>
<td>2.14</td>
</tr>
<tr>
<td>Examination Issue</td>
<td>2.15</td>
</tr>
<tr>
<td>Fee Issue</td>
<td>2.16</td>
</tr>
<tr>
<td>Graduation Issue</td>
<td>2.17</td>
</tr>
<tr>
<td>Timetabling Issue</td>
<td>2.18</td>
</tr>
<tr>
<td>Selection and/or admission</td>
<td>2.19</td>
</tr>
<tr>
<td>Other</td>
<td>2.20</td>
</tr>
</tbody>
</table>

### 2.11 to 2.20 Correspondence Outward
3.1 School Notification of Unsatisfactory Progress

3.2 Letter of Termination

3.3 AW Form - Application for Academic Waiver

3.4 AX Form - Application for Cross-institutional Enrolment

3.5 FP Form - Application for Adding a Unit on a Fee-Paying Basis

3.6 Enrolment Form

3.7 Change of Major
3.8 CR Form - Application for Credit

3.9 LAU Form - Application for Late Addition of Unit's

3.10 RC Form - Application for Right of Correction

3.11 Transfer from Single to Dual degree – same as 3.10

3.12 WEF Form - Application to Waive Late Enrolment Fee – same as 3.10

3.13 WC Form - Application for Withdrawal from Course – same as 3.10

3.14 ACC Form - Application to Course Complete (Autumn Graduation)
3.15 ACC Form - Application to Course Complete (Spring Graduation)

3.16 CE Form – Student Exchange

3.17 AAT Form – Authorisation for Release of Full Academic Transcript

4.1 DE Form - Application to sit for a Deferred Examination

4.2 EC Form - Notification of Examination Timetable Clash

4.3 MC Form - Student Medical Certificate

4.4 SA Form - Application for Special Adjustments
4.5 SC Form - Application for Special Consideration

5.1 Misconduct Correspondence General

5.2 Letter of Exclusion

6.1 CC Form - Change of Citizenship

6.2 FE Form - Request for Extension of Time to Pay Fees

6.3 RF Form - Application for Refund of Fees

6.4 RE Form - Re-credit of Student learning Entitlement (SLE) and Refund of Fees in Special Circumstances
6.5 RI Form - Application for Reinstatement of Enrolment

8.1 CN Form - Change of Name form

8.2 AAT Form - Release of Full Academic transcript

8.3 TR Form - Request for Transcript

8.4 ID Form - Replacement ID Card

8.5 UD Form – Request for Unit Description

8.6 RT Form – Replacement Testamur
Barcodes for each folder that is non-form based

9. Timetabling

10. Results

11. Publications

12. Student Systems

13. Academic Registrar

14. Head Client Services

15. Head Student Business Services

16. Head Student Systems
Appendix F - Request For Academic Staff Access To ZyLAB

REQUEST FOR ACADEMIC STAFF ACCESS TO ZyLAB

Faculty staff seeking access to ZyLAB are required to complete this form and return it by fax to the Manager, Information Resource Management Section 07 3623 7457.

You will be notified of your access by email.

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>School/Department Code</td>
</tr>
<tr>
<td>Campus</td>
</tr>
<tr>
<td>*Role</td>
</tr>
<tr>
<td>Staff Signature</td>
</tr>
<tr>
<td>HOS Approval</td>
</tr>
<tr>
<td>Name:</td>
</tr>
<tr>
<td>Signature:</td>
</tr>
</tbody>
</table>

*Please indicate if you are a HOS, CC, LIC, Administrative Officer

<table>
<thead>
<tr>
<th>Approved by HBS³</th>
<th>Signature:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actioned by ZyLAB Operating Officer</td>
<td>Date:</td>
</tr>
<tr>
<td></td>
<td>Academic informed:</td>
</tr>
<tr>
<td></td>
<td>Signature:</td>
</tr>
</tbody>
</table>

³ Initial roll-out only; thereafter, Manager, Information Resource Management Section.
### Appendix G - Document Free Text Instruction Sheet

<table>
<thead>
<tr>
<th>Student Administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Free Text Instruction Sheet</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Staff Member’s Name: _____________________________________________</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>File Name: ________________________________________________________</td>
</tr>
<tr>
<td>Student Number: _________________________________________________</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Suggested Free Text Title: ________________________________________</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Index to which Document has been Scanned</td>
</tr>
<tr>
<td>Index Name: _____________________________________________________</td>
</tr>
<tr>
<td>Date and Time of Scanning</td>
</tr>
<tr>
<td>Date: <strong>/</strong>/____  Time: ______</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Super User Name: _________________________________________________</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Free Text Title Added: ____________________________________________</td>
</tr>
</tbody>
</table>
| Date Entered: Date: __/__/____  Time: ______}