System EZD PUW Employee's Manual

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Introduction to System EZD PUW

System EZD PUW, or more commonly named *System EZD*, is an Electronic Document Management system used on the Jagiellonian University.

The main purpose of this IT system is to provide the electronic documentation workflow across the University. The system allows to create, accept and proceed various electronic documents in every organization unit of the JU.

The system operates only in Polish, with no possibility of changing the language. This Employee's Manual explains the basic functionality of the system, which would allow non-Polish speakers to proceed electronic documentation in System EZD.

This manual contains polish names of the functions and operations, which are used in the system. These names are written in ***Bold italic*** font.

Accessing the System EZD

System EZD can be accessed by a web browser at https://ezd.uj.edu.pl

Recommended browsers are Google Chrome, Microsoft Edge and Mozilla Firefox. Please note, that Safari cannot be used to access the system.

When using the Microsoft Windows operating system, it is recommended to install additional software – EZD Add-In. This software allows to open Microsoft Word documents directly from the case file, or electronically sign the documents, among other things.

Access to the system is open from the internal University network or outside the network, using JU's VPN software (Pulse Secure).

When accessing the system using VPN, the SAP connection can be used to access the system. For more information, please contact your supervisor, IT helpdesk or EZD helpdesk.

The main concept of workflow

Every electronic document in System EZD is processed in a case file - ***Koszulka*** or ***Sprawa***. The case file contains one or more documents, notes or opinions. Every document added to the case file must be supplemented with its metadata - ***Metadane***.

The documents processed in System EZD can be accepted or digitally signed across their workflow by the employees. Every employee can accept a document in System EZD. The acceptance (*Akceptacja*) is equivalent to signing the document, as long as the document remains in the internal workflow

Employees, who have an electronic signature, can digitally sign the documents in System EZD. Digitally signed documents cannot by accepted using the acceptance function by subsequent employees, therefore the acceptance option is recommended in the internal document workflow. Digital signature may be required, when the document will be sent outside the University.

The case file, including the set of the documentation, can be forwarded to the next employee for proceeding using the Forward (*Przekaż*) function. The case file can be forwarded to any person at the University. Certain organization units, including Deans', Rectors', Chancellor's or Bursar's Offices, have a special unit's account, where the cases should be forwarded.

When forwarding the case, the employee should fill the decree description (*Uwagi*) with a short note describing the purpose of the forwarding.

At the end of the workflow, the case should be closed.

Any case may be proceeded with assigned case number or without it. The assignment should be done based on the case subject and legal regulations.

The main page interface

The main page consists of a number of sections:

- *Nowe pisma* (New case files)– a list of case files received by the employee, which hasn't been opened yet.
- *Pisma w realizacji* (Case files in processing) – a list of case files, that are in processing by the employee, and hasn't been forwarded or closed yet.
- *Osoby zastępowane* (Substitute persons) – a list of persons, which the employee can substitute for and process his/her case files.
- *Przypomnienia* (Remainders) – a list of set remainders for the employee's cases.
- *Kod kreskowy* (Barcode) – allows to scan the barcode from a paper document and view the case assigned to it. Usable only with the documents registered in the register of incoming letters.
- *Znak sprawy* (Case number) – allows to view the case based on its case number or case file ID.
- *Linki* (Other links) – it includes a New case (*Nowa koszulka*) button.

The left-sided menu includes folders (*Foldery*), where the proceeded cases can be found. The most important folders include:

- *Nowe* (New) – case files received by the employee, which hasn't been opened yet.
- *W realizacji* (In processing) – case files, that are in processing by the employee, and hasn't been opened yet.
- *Przekazane* (Forwarded) – case files previously owned by the employee, which has been forwarded.
- *Zakończone* (Closed) – case files previously owned by the employee, which has been closed.

The following image presents the basic view of the main page, with the English translations.
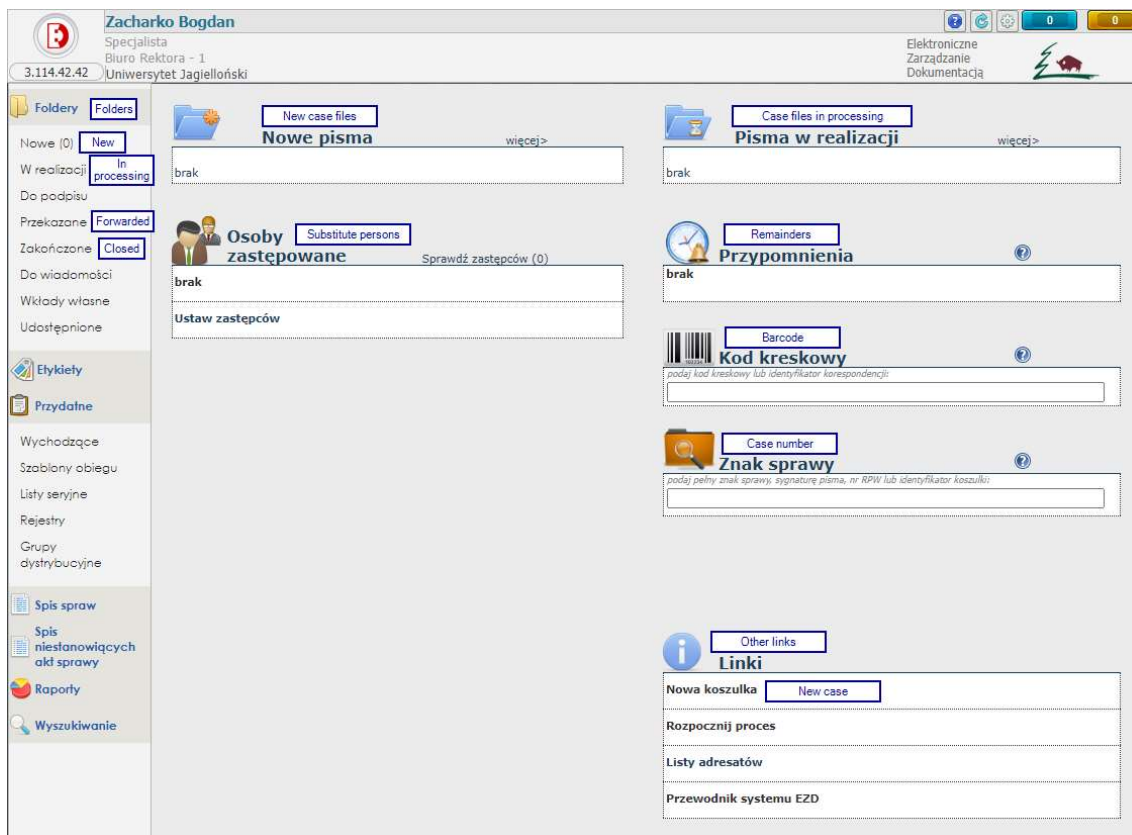
Creating the case file

In order to begin the process of a new case, an employee must create a new case file. This can be done on the main page of the system using the *Nowa koszulka* (New case file) button, under the links section.
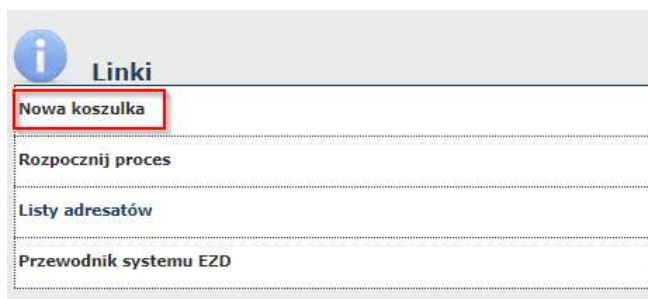
New case file can be also created from the view of any folder, using the *Nowa koszulka* (New case file) button.
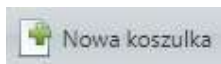
After clicking the button, an employee must fill a name of the case file in the popup window. The name should consist of at least 2 words.

The popup window has 2 buttons – *Dodaj* (Add), which creates a new case, and *Anuluj* (Cancel).

After successfully creating a new case, an employee will be redirected to the case view.

The case view interface

The main elements of the case view interface are the case description and the list of case documents - *Akta*. The interface also includes various operations and actions, which can be performed on the case file.

The elements of this view include:

- *Nazwa* – The case file name
- *Nadawca koszulki* – Information about the employee, who forwarded the case file, along with the decree description (if provided)
- *Akta* - List of case documents
- *Obieg dokumentów* – history of the case file workflow, along with the decree descriptions (if these were provided)

There are also action buttons, which allow adding new documents, notes or opinions to the case file:

- *Nowy* – create a new document based on the template. This option requires additional software – EZD Add-In and works only on Windows OS.
- *Notatka* – create a note, that will be included in the case file documents
- *Załącznik* – upload a new document from PC
- *Opinia* – create an opinion (similar to note), that will be included in the case file documents.
- *ePismo* – create an electronic message to be sent via ePUAP platform
- *Odśwież* – refreshes the list of the case file documents

In the upper part of the view, there are operations, which can be performed on the case file itself. These operations include:

- *Przekaż* – Forward the case file
- *Zwróć* – Return the case file to the sender. Operation available only, when other employee forwards us the case.
- *Udostępnij* – Share the documents from the case with one or more employees
- *Załóż sprawę* – Assign case number. Visible only if no number is assigned to the case.
- *Zakończ* – Close the case

## The case file document list

The document list consists of document names and actions, which can be performed on particular document.

Some documents may be highlighted with coloured background. This highlight indicates marking for acceptance. Documents with yellow highlight are marked for acceptance, but hasn't been accepted yet by anyone. Documents with green highlight ale also marked for acceptance, but has been previously accepted by one or more employees.

Next to the document name, there are action buttons available for the particular document. These include:

- 🔏 or 🔏 - sign the document using electronic signature. The red colour indicates, that the document was previously signed. This operation requires EZD Add-In installed on the PC.
- 📄 - mark the document for acceptance
- ✅ - accept the document
- ℹ️ - document information – list of the acceptances
- 📄 or 📄 - document metadata. The grey icon indicates, that the metadata hasn't been filled.
- 📄 - rename the document

On the right side, there are also buttons:

- ↻ - update the document file
- ▤ - document history
- 🗑 - delete the document

By clicking the document name with the right mouse button, a context menu pops up, with the full list of actions available on the document.

In order to view the document, an employee must click the document name or click the document with right mouse button opening the context menu, and click *Pobierz* (Download) button.

Opening documents in Microsoft Office format (DOCX, XLSX extensions) will be performed directly from the case file view, by using EZD Add-In software. Please note that saving the document will instantly update the document in the case file.

If an employee does not have EZD Add-In software installed, the Microsoft Office document must be downloaded from the document context menu using the *Pobierz* (Download) button:
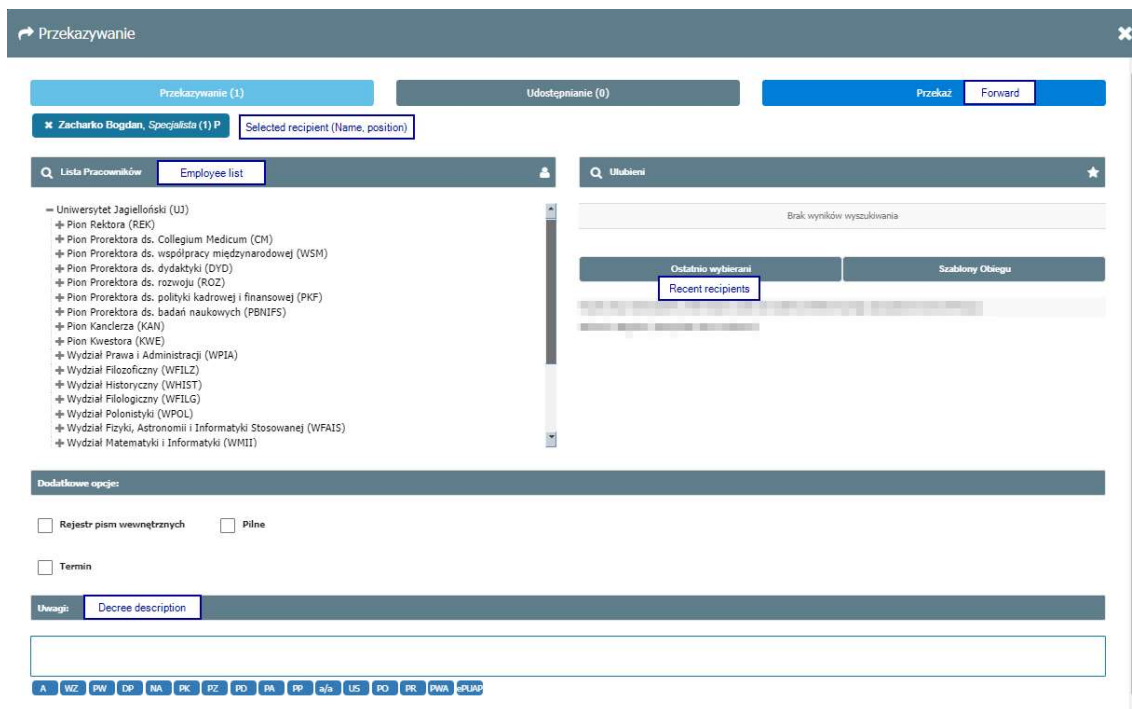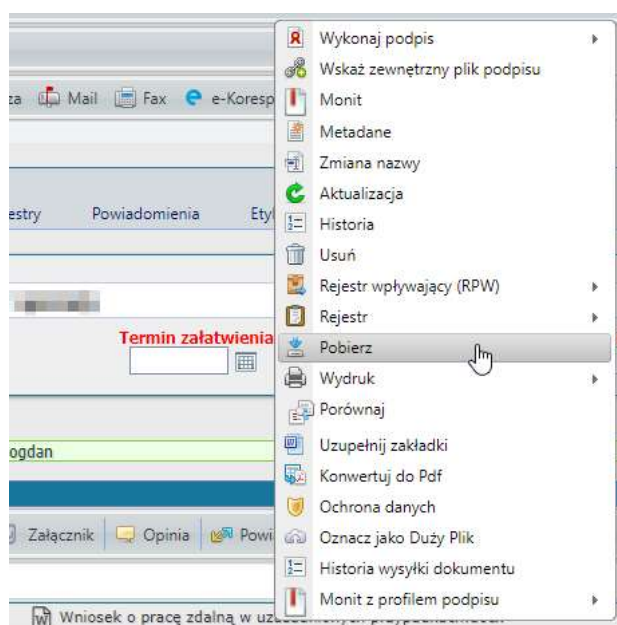

Forwarding a case

In order to forward a case to a specific employee of the JU, the current case owner must perform the operation of *Przekazanie* (Forwarding).

The starting point of this operation is the case file view. In order to forward the case, the employee should add or accept the case documents beforehand, if necessary.

To perform the operation of forwarding, an employee clicks the *Przekaż* (Forward) button, in the upper part of the case file view:
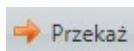
The popup window will appear, containing the forwarding form. The following image represents the form along with the translation its key elements. Please note, that the image shows the state, where the recipient has already been selected.

When opening the form, the cursor should be focused in the employee list (*Lista pracowników*) section. If not, clicking on the section header and typing the last name of the employee should list matching employees in the section body, which allows to quickly find the employee.

After typing, an employee must click the name of the desired person. His/her name will appear on the top of the window (as shown near the *Selected recipient* box).

Next, an employee should fill a short decree description in the *Uwagi* box, at the bottom of the form. To view this section, scrolling the window may be required. Completing the field is not required, but strongly recommended.

After completing the form, the employee should finish the process by clicking *Przekaż* (Forward) button at the top of the form. Clicking will result in another popup window appearing, with confirmation:

The popup window displays a confirmation message: *Do you confirm forwarding the documentation to 1 person?*

Clicking the blue *Tak* button will result in forwarding the case file. The employee will be redirected to the main page.

Scenario: Accept a document and return

This scenario will cover the process of receiving a case file, with documents for acceptance, accepting the documents and returning the case file to the sender.

- The employee needs to access System EZD through a web browser at https://ezd.uj.edu.pl
- On main page, the employee must open the case by clicking its name in the *New case files* (***Nowe pisma***) secition.
- The employee locates the document in the case file documents section. Document marked for acceptance is highlighted in yellow or green.
- Document should be read before accepting. In order to download the document, employee must click its name or open context menu by clicking its name with right mouse button and selecting ***Pobierz*** (Download).
- If there are no remarks regarding the document, an employee clicks the Accept button next to the document name: and confirms the acceptance in the popup window by clicking ***TAK*** (YES) button.
- After accepting, the employee returns the case file to the sender by clicking ***Zwróć*** (Return) button in the upper part of the case file view.
- In the text area, employee should write a short decree description, i.e. "I accept, please proceed with the case".
- The return is confirmed by clicking the ***Zwróć*** (Return) button at the bottom of the view and then clicking ***OK*** in the popup confirmation window.
- The case file, with the accepted document, is returned to the sender.