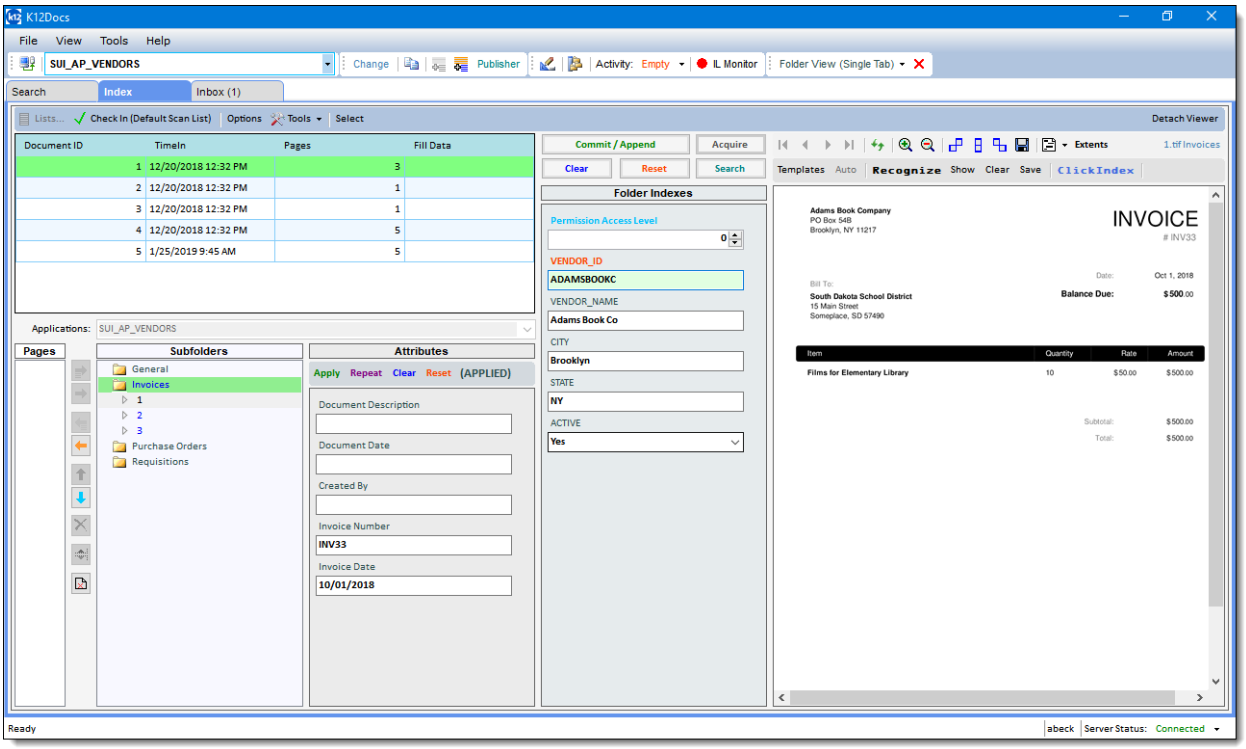
K12Docs GX

Indexing End User Manual



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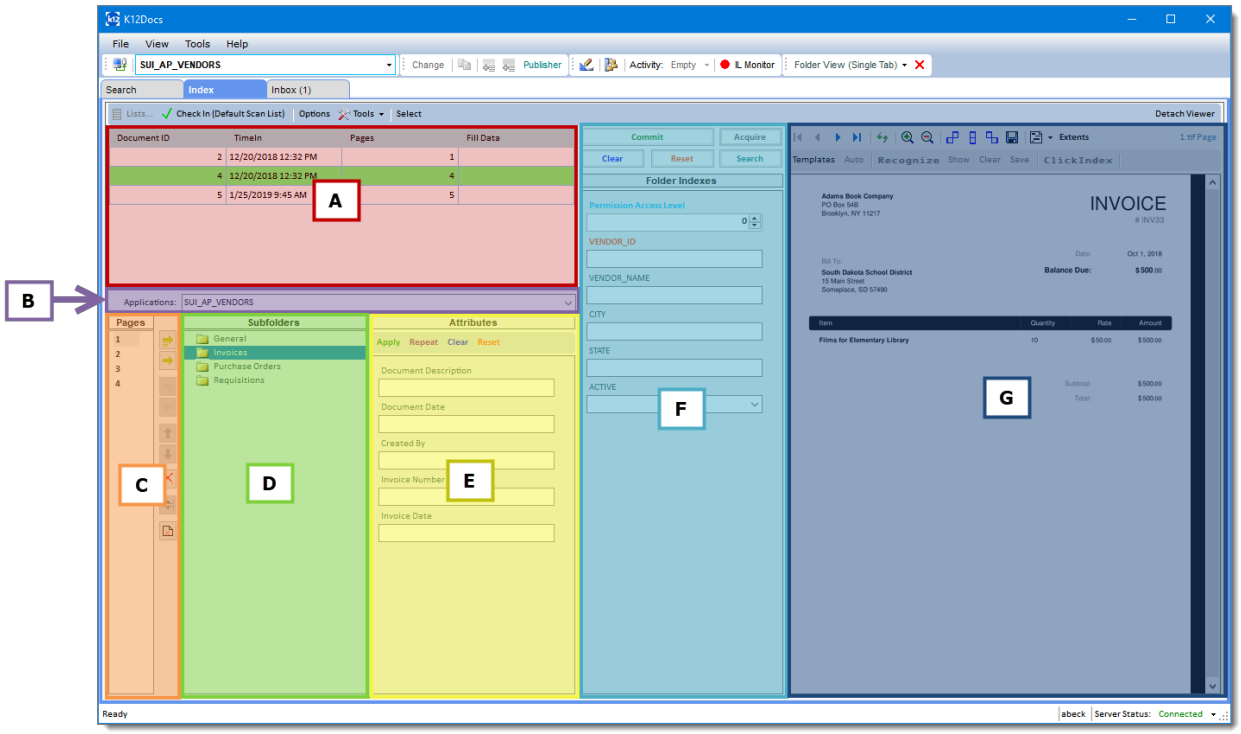
Overview & Layout

Indexing is the process of associating data with a scanned document, which is then used to retrieve the document at a later point in time. Indexing is similar to labeling a folder you put into a filing cabinet for later retrieval. K12Docs GX also gives you the ability to perform some additional actions to scanned documents before they are indexed. Some of these actions include separating scanned documents, combining scanned documents, deleting select pages or entire documents, adding bookmarks and notes to scanned documents.



A: Document Area

When an Index Document List is checked out, a list of scanned documents, which have been previously separated into individual document, will appear in this area. The information included with each document is: the document number, the date and time the document was scanned, how many pages the document contains and a fill data indicator that informs you if the document contains metadata. The document Area also allows you to combine separate documents into one document and delete selected documents or all documents.

B: Application Area

When an Index Document list, which is tied to a specific application, is checked out, the application will be automatically selected and displayed in the Application Area. If the Index Document List that is checked out is not tied to an application, no application will appear in the Application Area, so one will need to be selected.

C: Page Area

When a document is selected from the document area, all pages for it will be displayed here. To the right of the Page Area are page level controls that allow you to: Delete a single page or multiple pages and separate pages into a new document.

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D: Subfolder Area

The subfolder area allows you to categorize the selected document into the appropriate subfolder. To the left of the Subfolder Area are page level controls that allow you to: Add all pages to a subfolder, Add a single page to a subfolder, Remove all pages from a subfolder, Remove a selected page from a subfolder, Move a page up, and Move a page down. Depending on the selected applications design, the Subfolder Area may appear differently.

E: Document Attribute Area

Once a document has been moved into a subfolder, document attributes can now be applied to it from the Document Attributes area. Document attributes help identify the document quickly and easily when it is searched for at a later point in time. Depending on the selected applications design, the Document Attribute Area may not appear.

F: Folder Indexes Area

Once a document has been moved into a subfolder, folder indexes can now be applied to it from the Folder Indexes area. Folder indexes help identify which folder the selected document is located in when it is searched for at a later point in time. Depending on the selected applications design, if the Document Attribute area appears, the document attributes will need to be applied to the before the folder indexes are applied.

G: Image Viewer Area

When a document is selected, the first page will automatically load in the Image Viewer Area. The Image Viewer Area provides image viewing tools that allow you to: Navigate between the pages in the selected document, refresh the image displayed in the Image Viewer Area, Zoom in, Zoom out, Rotate and save the selected page, Add page redactions, bookmarks, and notes, detach the Image View Area, use Realtime Zonal OCR, and build Zonal OCR recognition templates.

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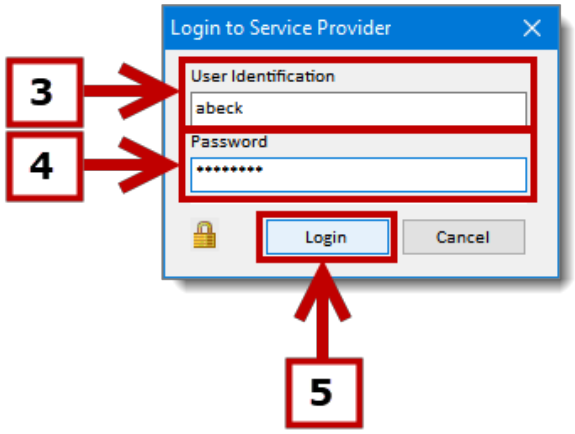
Login

Before you can start indexing, you must first login to the K12Docs GX. To login, follow the steps listed below:

Steps:

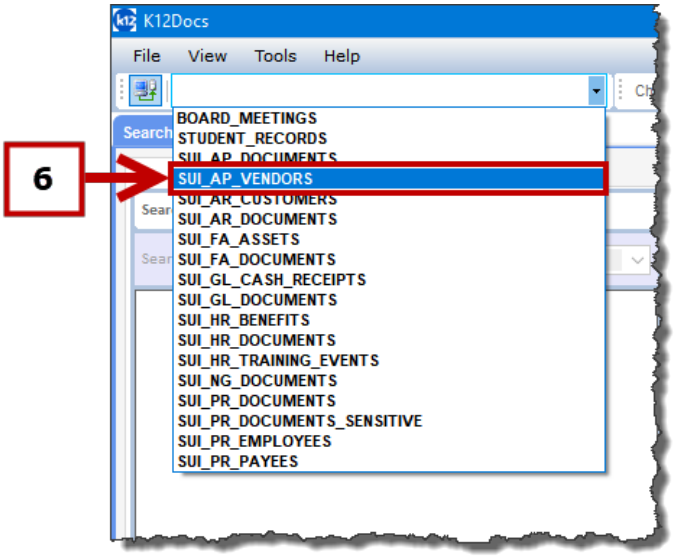
1. Launch the **K12Docs GX** software.
2. A **Login to Service Provider** window will pop up (*see Figure 1.1*).
3. Enter a user name into the **User Identification** field (*see Figure 1.1*).
4. Enter a password into the **Password** field (*see Figure 1.1*).
5. Click on the **Login** button (*see Figure 1.1*).

Figure 1.1



6. Once logged in, select the application you want to index documents into (*see Figure 1.2*).

Figure 1.2



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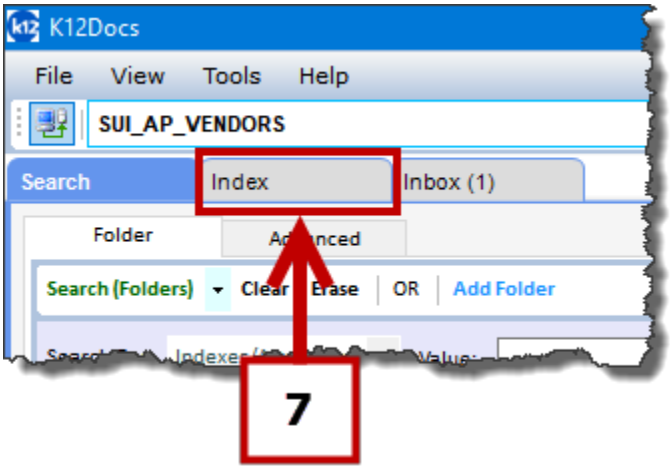
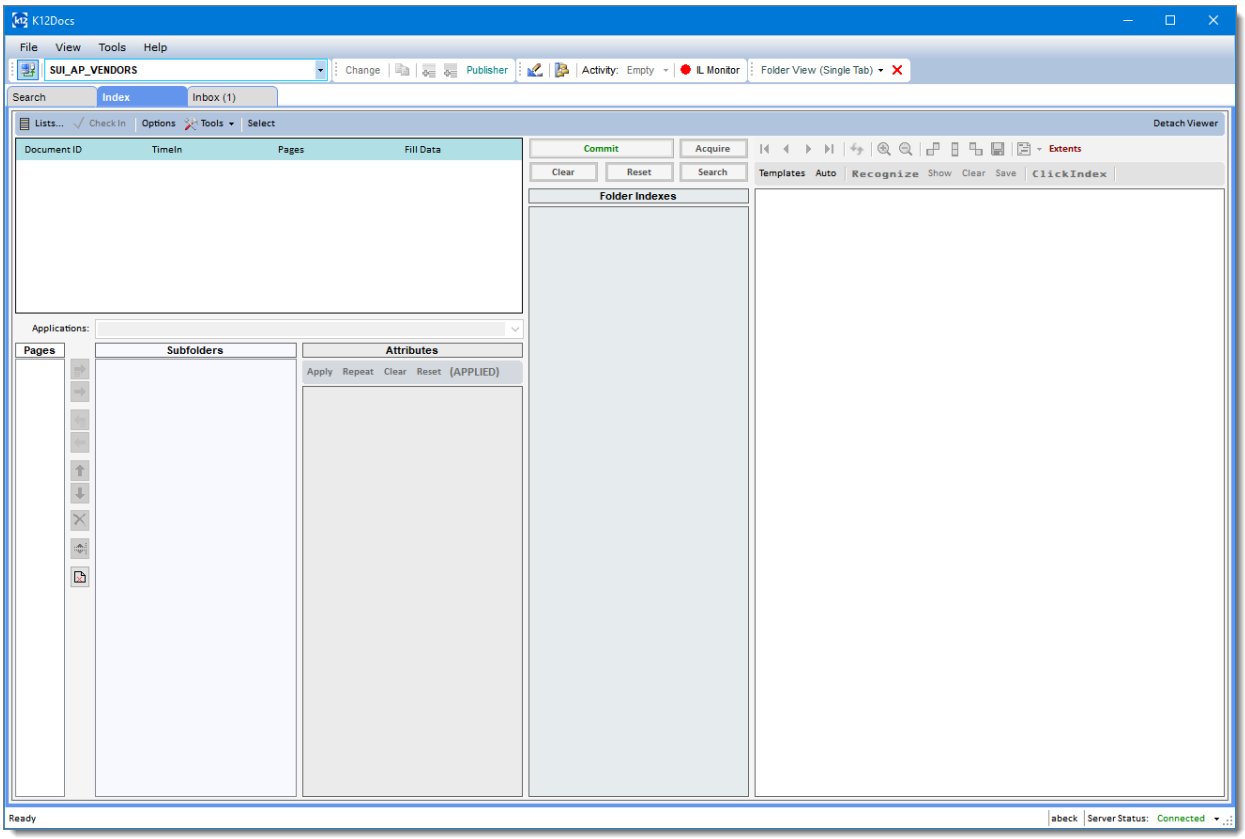
7. Click on the **Index** tab (*see Figure 1.3*).

Figure 1.3



8. The **Index** tab will load and the indexing process can begin (*see Figure 1.4*).

Figure 1.4



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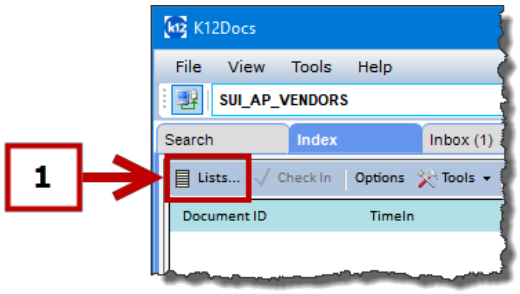
Opening an Index Document List

An Index Document List is a temporary storage location for scanned documents that are ready to be indexed. Checking out an Index Document List allows you to open a specific list of scanned documents to index into a selected application. To check out an Index Document List, follow the steps listed below:

Steps:

1. Click on the **List...** button (*see Figure 1.5*).

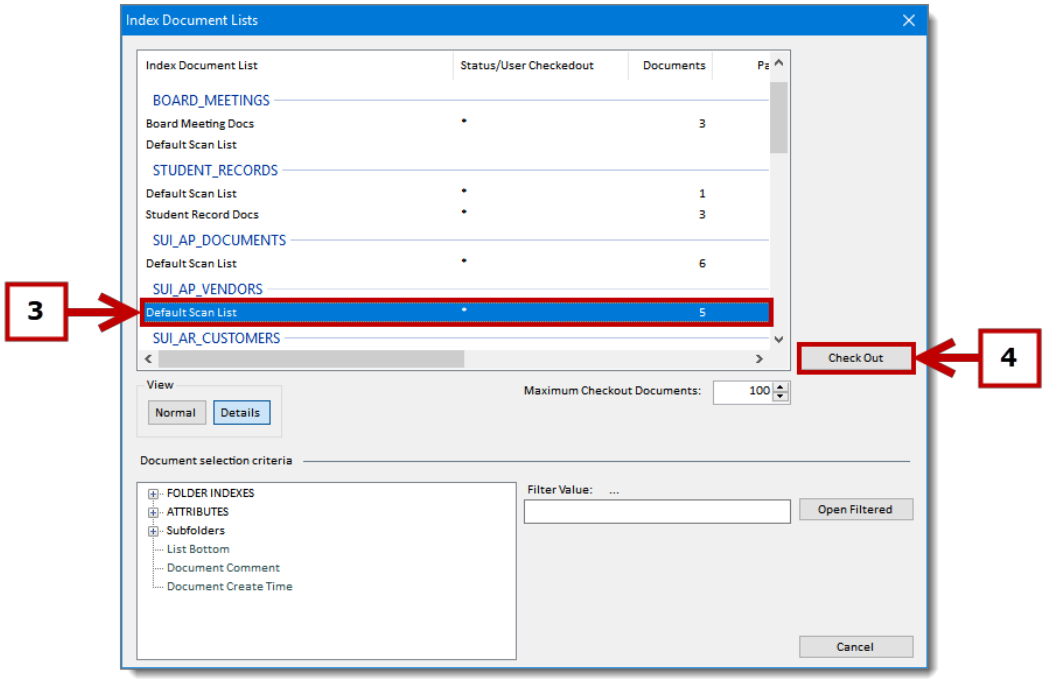
Figure 1.5



2. An **Index Document Lists** window will pop up (*see Figure 1.6*).
3. Select the **Index Document List** you would like to check out (*see Figure 1.6*).
4. Click on the **Check Out** button (*see Figure 1.6*).

> **Note** a) *You can also check out an Index Document List by selecting the desired List and double-clicking on it.*

Figure 1.6



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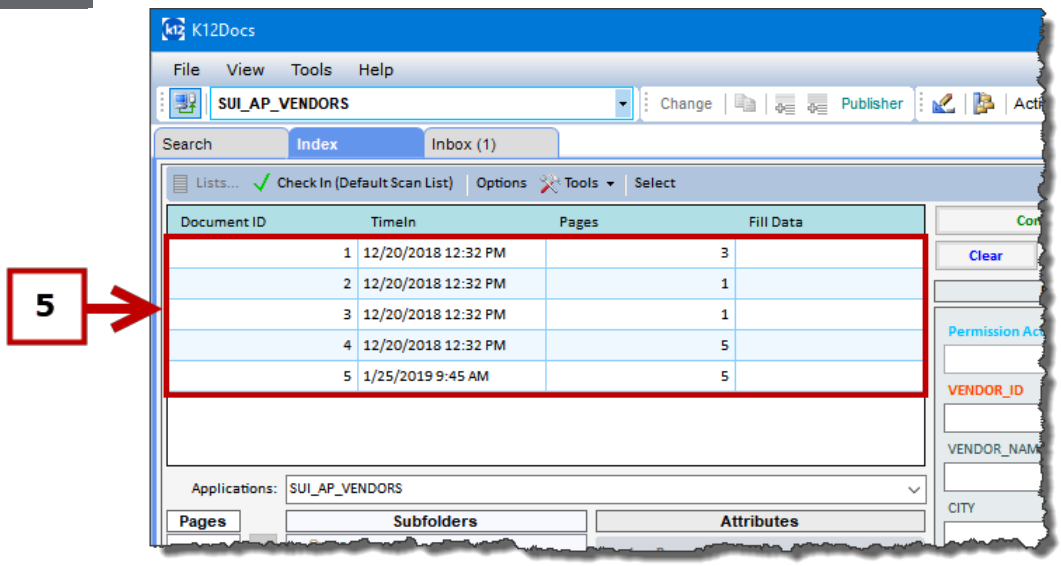
5. The selected **Index Document List** will now open in the **Index** tab (*see Figure 1.7*).

Figure 1.7



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Indexing a Document

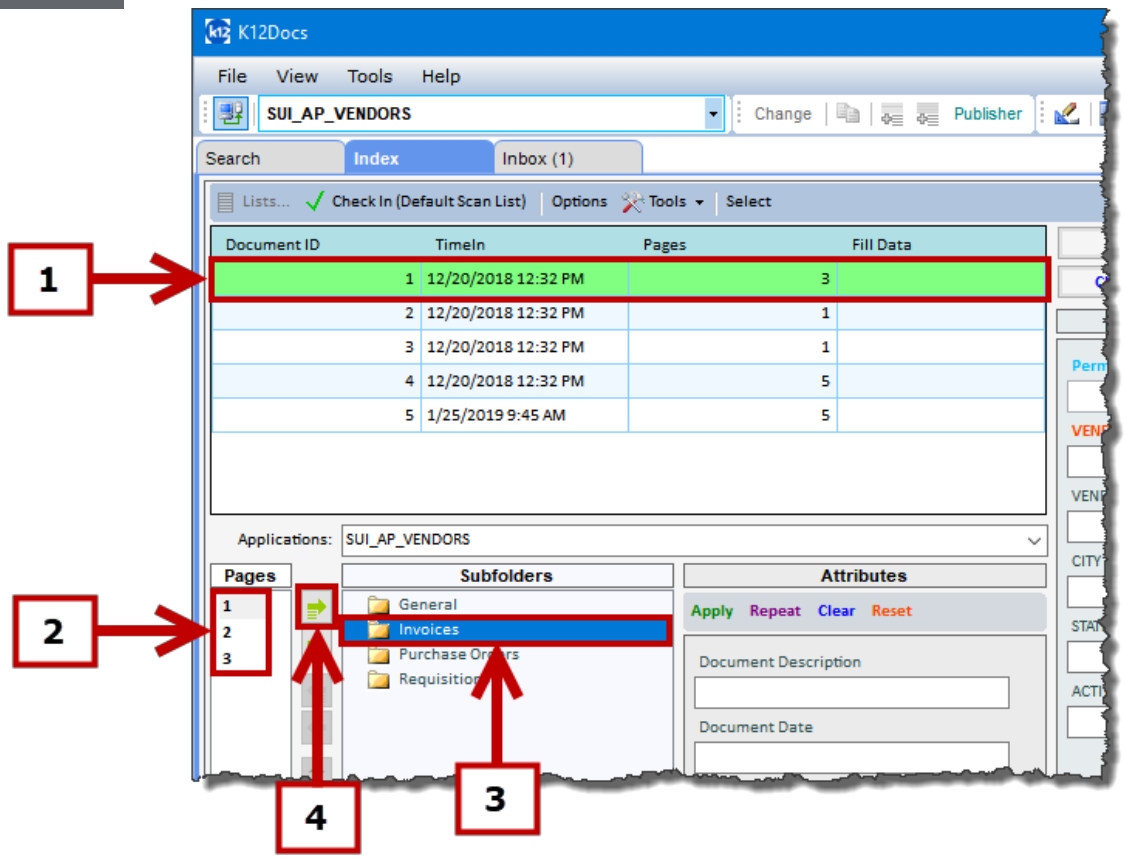
After documents have been scanned and added to an index document list, they are ready to be indexed. The sections below will help explain indexing a document in more detail and other options that are available when indexing a document. To index a document, follow the steps listed below:

Steps:

1. Select the **Document** you want to index (*see Figure 1.8*).
2. The individual pages for the selected document will be displayed in the **Pages** area (*see Figure 1.8*).
3. Select the **Subfolder** you want to add the selected document to (*see Figure 1.8*).
4. Click on the **Add All Pages** button (*see Figure 1.8*).

Note	a) *You can also drag and drop the document pages into a subfolder. For a single page, select the page with your cursor and drag to the desired subfolder. For a selection of pages, hold down the **CTRL** key, select the pages with your cursor and drag them to the desired subfolder. For all pages, select the first page with your cursor, hold down the **SHIFT** key, select the last page and drag all pages to the desired subfolder.*

Figure 1.8



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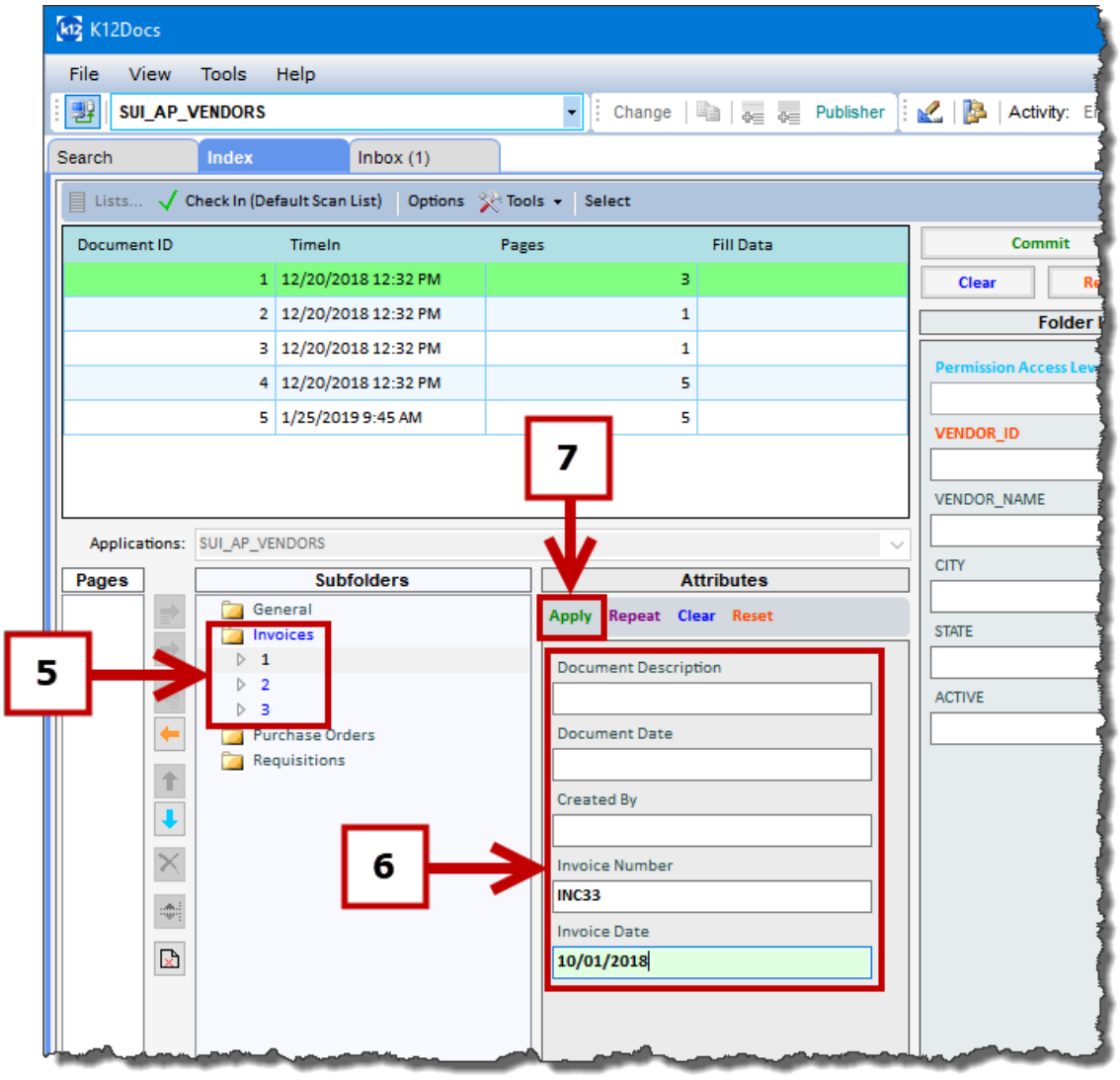
5. The selected document will now appear in the selected subfolder (*see Figure 1.9*).
6. In the **Attributes** area, enter the desired document label information into the provided field(s) for the selected document (*see Figure 1.9*).
7. Click on the **Apply** button (*see Figure 1.9*).

Note	a) *Once the document attributes have been applied to the selected document, the same attributes can also be applied to another document. To do this, click on the **Repeat** button to save the document attribute data and when you are ready to apply the data to the new document, click on the **Repeat** button again.* b) *To clear the data out of the document attribute fields, click on the **Clear** button.* c) *To reset the default data in the document attribute fields, click on the **Reset** button.*

Figure 1.9



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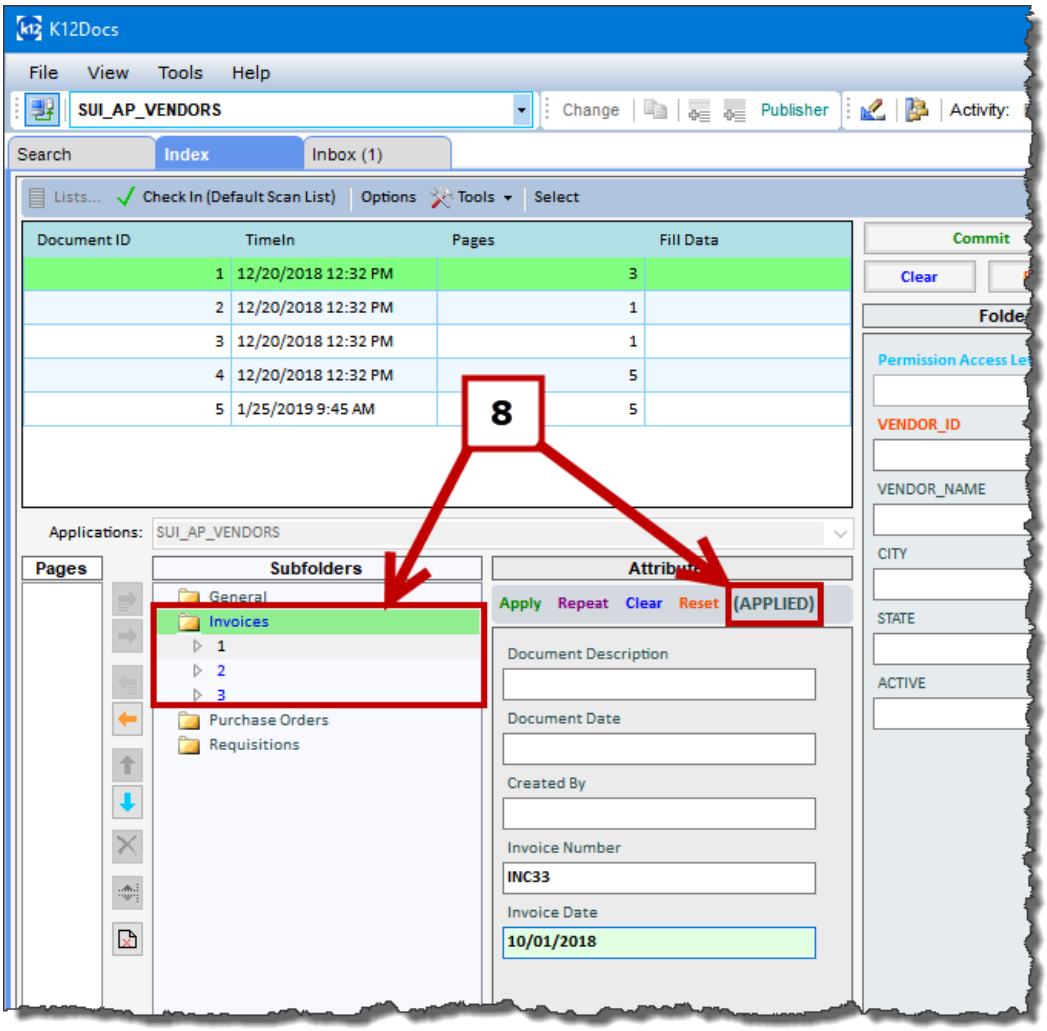
8. The document attribute(s) are now applied to the selected document (*see Figure 1.10*).

Figure 1.10



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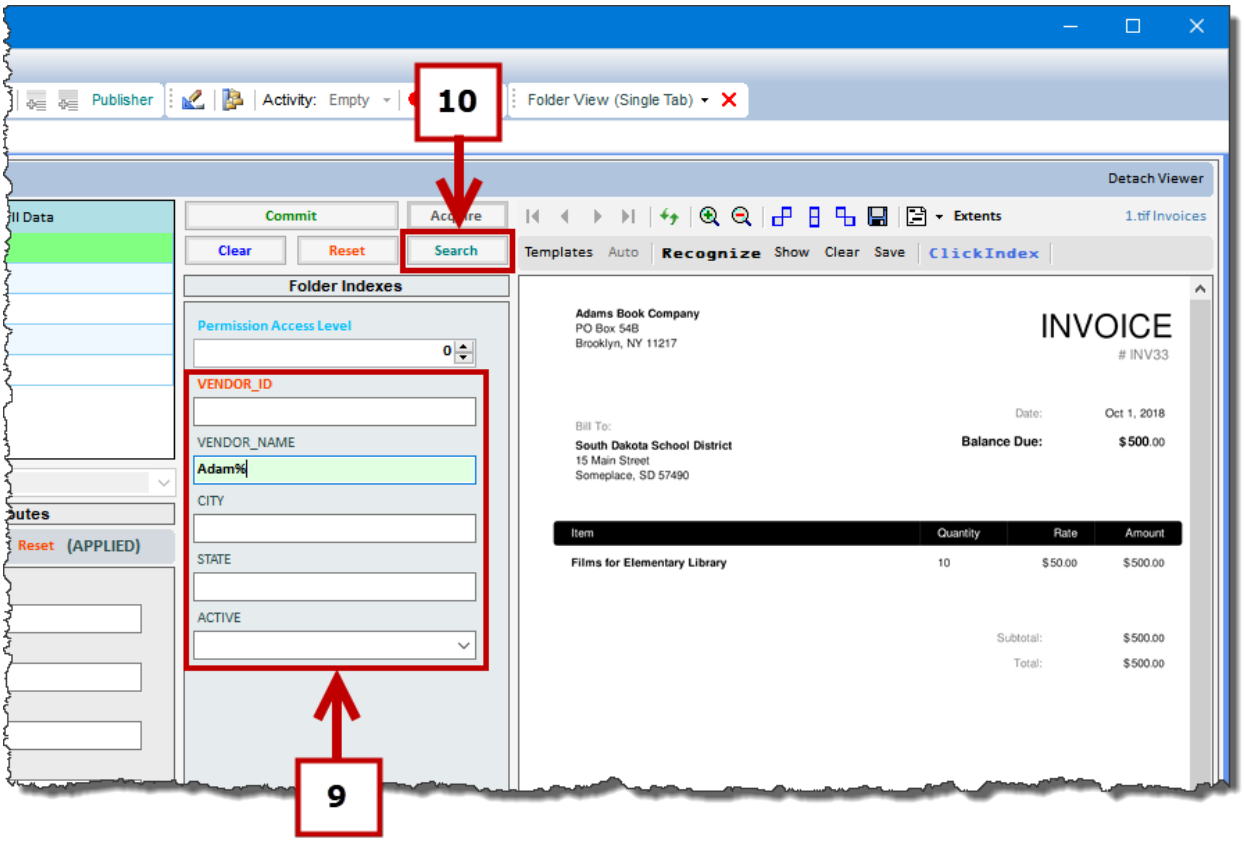
9. Search for the folder you want to add the document to by entering your search criteria into the **Folder Index** fields (*see Figure 1.11*).

   Note *a) You can use the Wildcard (%) symbol when searching.*

10. Click on the **Search** button (*see Figure 1.11*).

Figure 1.11



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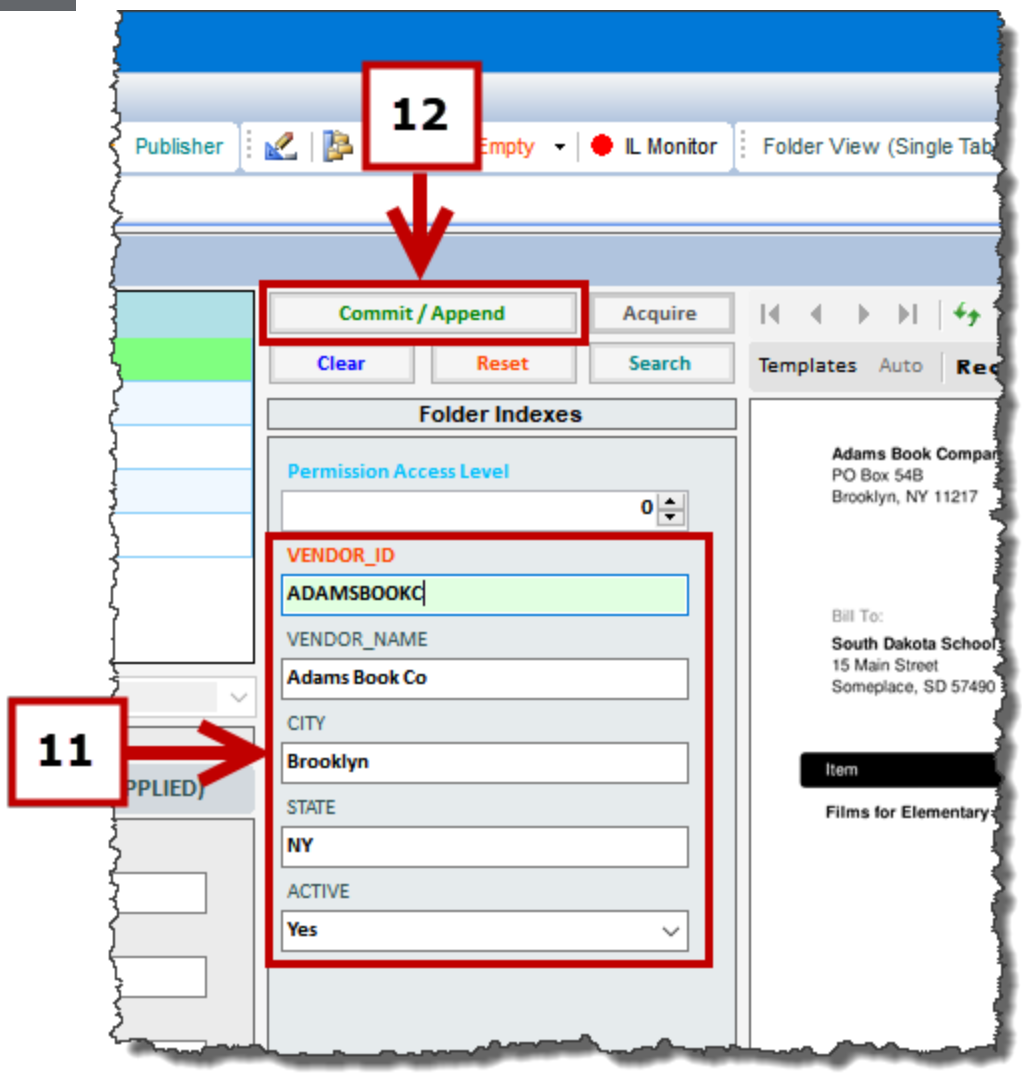
11. If a folder with the correct search information is found, the Folder Index fields will then auto populate with the folders information (*see Figure 1.12*).

Note	*a) If a folder is not found, this means you can either enter other search criteria and try the search again or you can manually enter in the necessary information into the Folder Index fields to create a new folder.* *b) To clear the data out of the folder index fields, click on the **Clear** button.* *c) To reset the default data in the folder index fields, click on the **Reset** button.*

12. Click on the **Commit/Append** button (*see Figure 1.12*).

Figure 1.12



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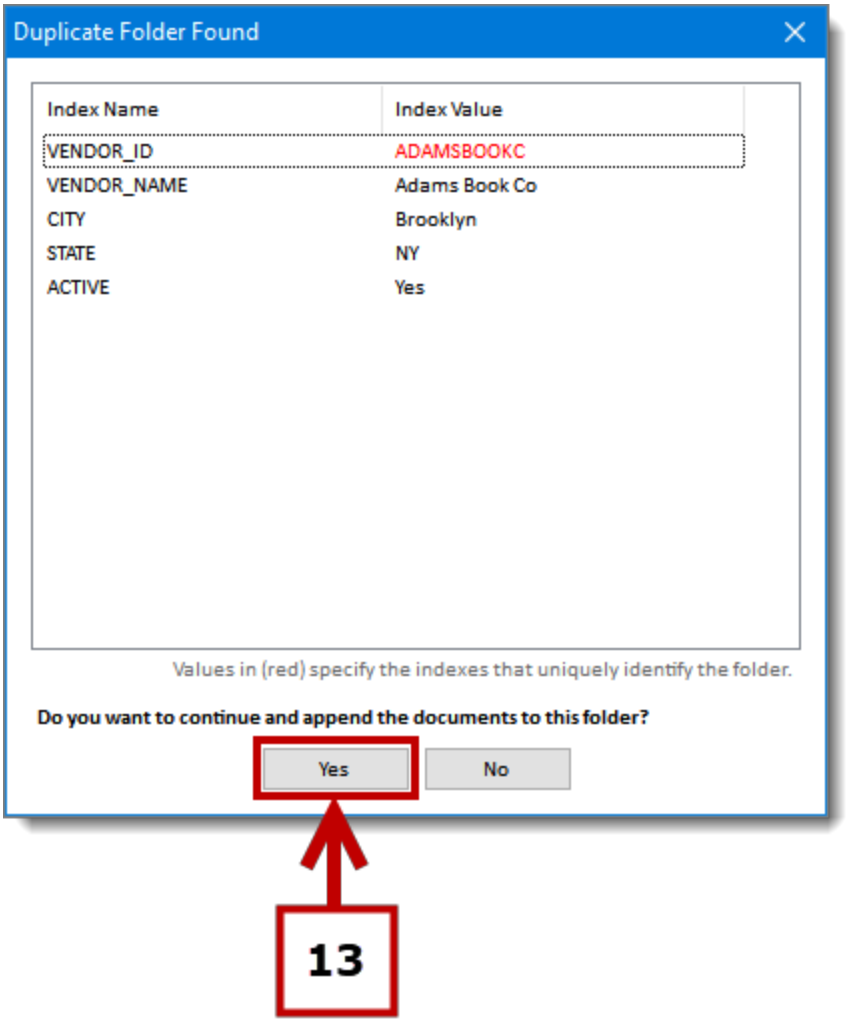
13. If you searched for a folder to append the document to, a **Duplicate Folder Found** window will pop up. Click on the **Yes** button to confirm you want to add the document to this folder (*see Figure 1.13*).

Note	a) *If you are creating a new folder, move onto **Step 14**.* b) *If you do not want to see the **Duplicate Folder Found** window pop up every time you index, you can turn this window off in the **Index Options** by selecting the option "Do not show commit append confirmation window."*

Figure 1.13



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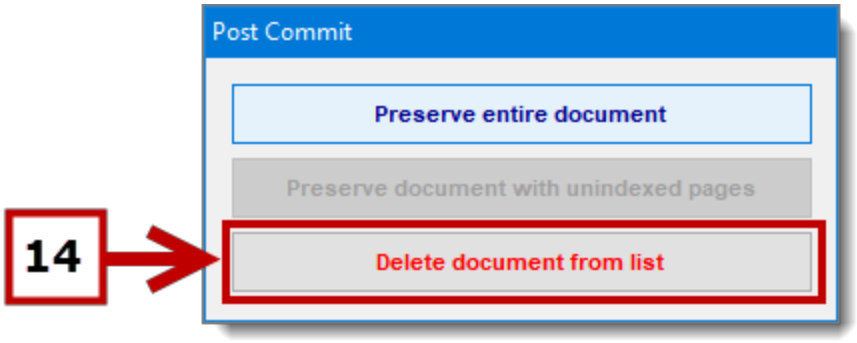
14. A **Post Commit** window will pop (*see Figure 1.14*).

Note	*a) The **Preserve entire document** button allows for the selected document to remain in the Index List until you manually delete it, allowing for the selected document to be indexed into multiple folders without rescanning the document.* *b) If you decided to index only part of the selected document, the **Preserve document with unindexed pages** button allows for the remainder of the selected document that is unindexed to remain in the Index List until you index it.* *c) The **Delete document from list** button allows for the selected document to be permanent deleted from the Index List and filed into the chosen application.* *d) If you do not want to see the **Post Commit** window pop up every time you index, you can turn this window off in the **Index Options** by selecting which button option you want to use when selecting the "Commit" button.*

15. Click on the **Delete document from list** button (*see Figure 1.14*).

Figure 1.14



16. The selected document is now indexed and removed from the selected Index Document List.

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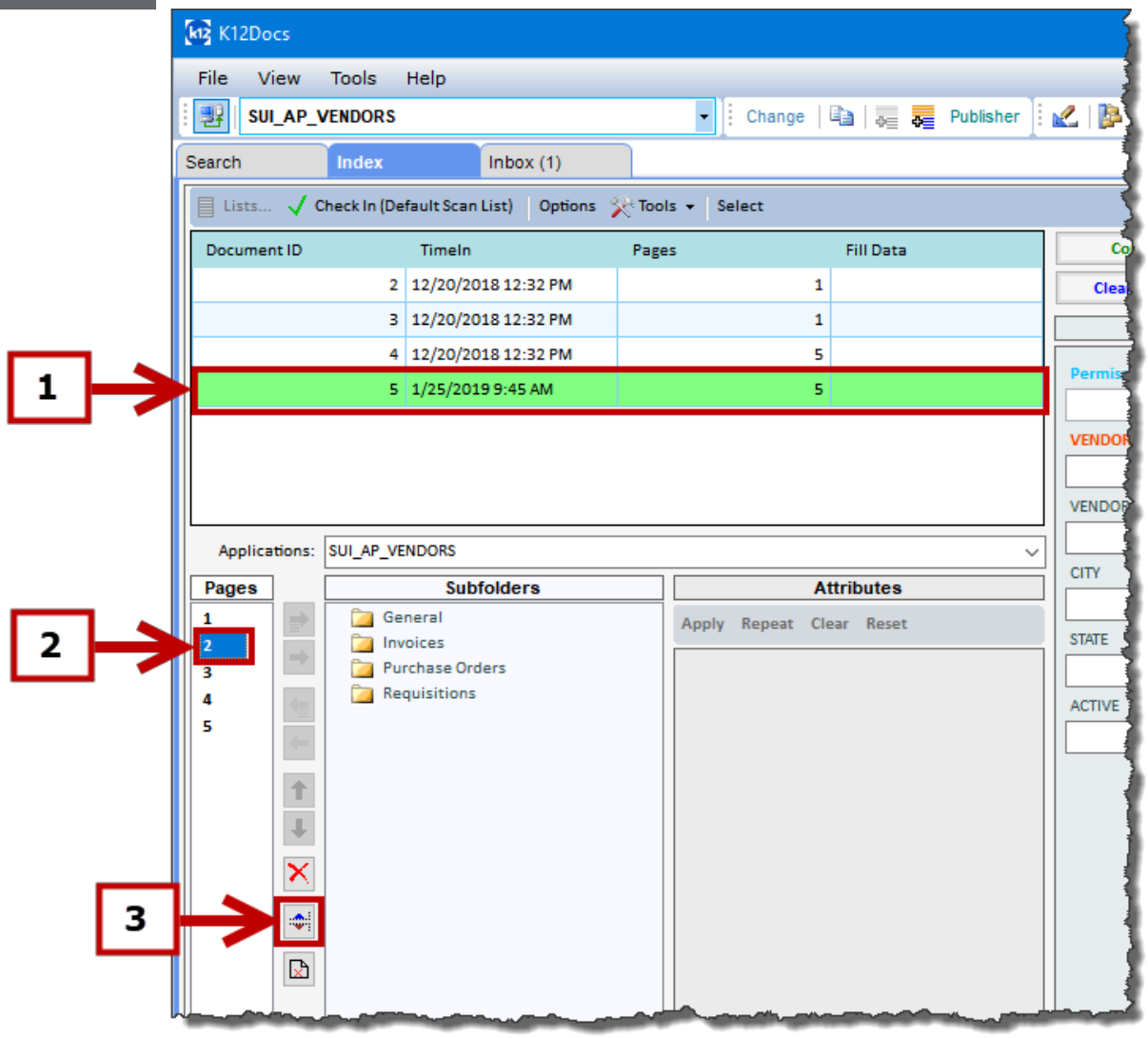
Separating a Document

Separating a document enables you to select pages within a document and separate them into another document for indexing. To separate a document, follow the steps listed below:

Steps:

1. Select the document that contains the pages you would like to separate into a new document (*see Figure 1.15*).
2. Select the beginning page of the pages you would like to separate into a new document (*see Figure 1.15*).
3. Click on the **Separate Document** button (*see Figure 1.15*).

Figure 1.15



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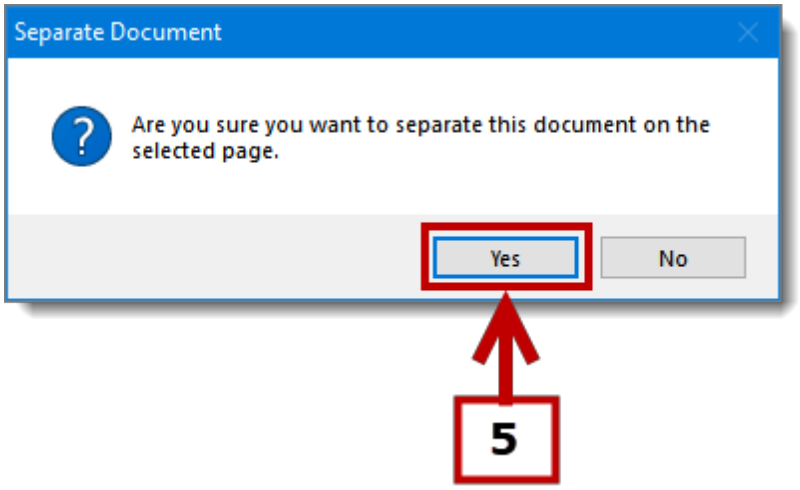
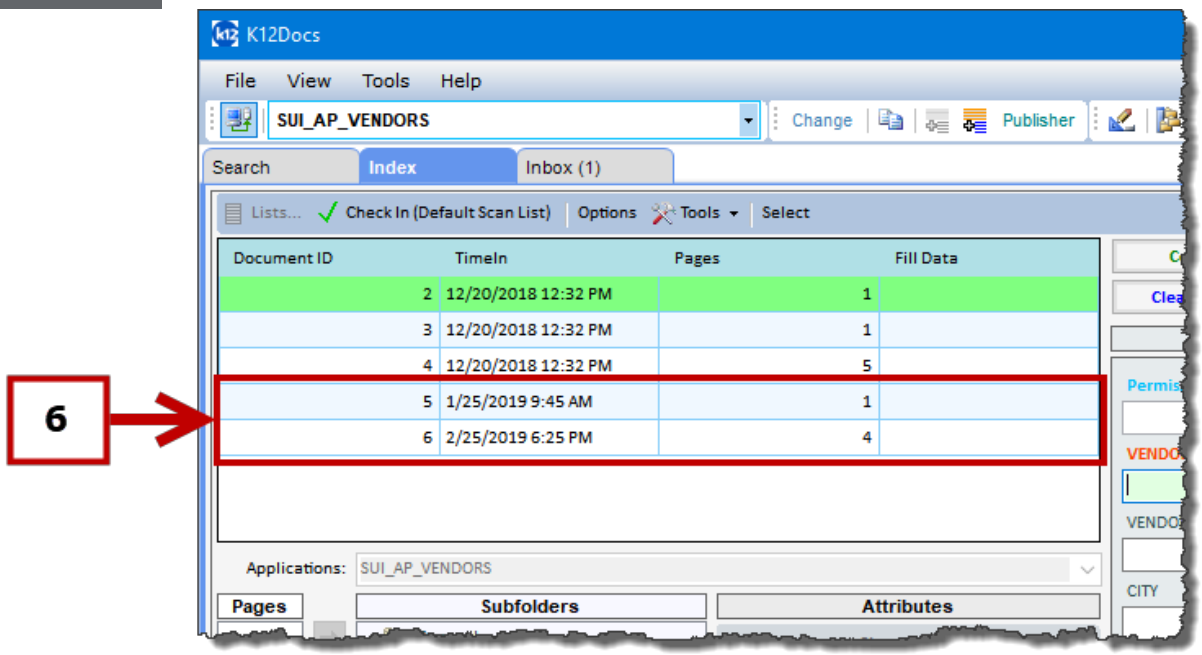
4. A **Separate Document** window will pop up asking if you want to separate the selected document on the selected page (*see Figure 1.16*).
5. Click on the **Yes** button (*see Figure 1.16*).

Figure 1.16



6. The selected document has now separated into two separate documents (*see Figure 1.17*).

Figure 1.17



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Combining Documents

Combining documents allows for separated documents to be combined together before being indexed. To combine documents, follow the steps listed below.

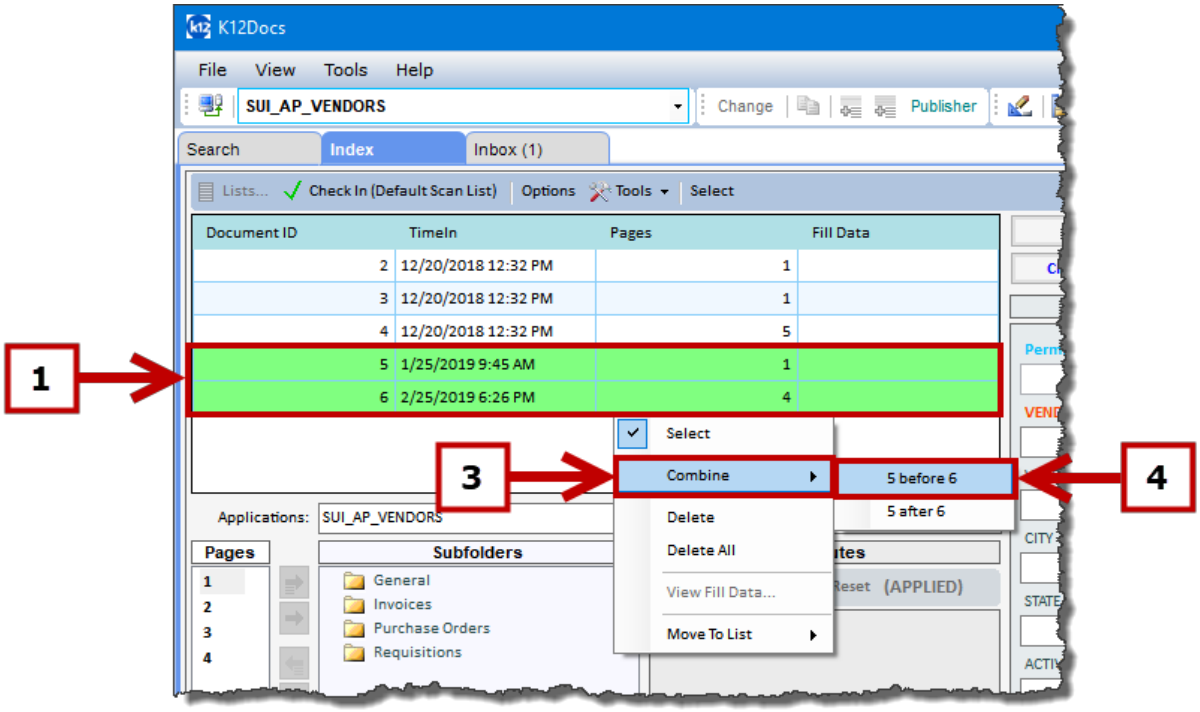
Steps:

1. Select the two documents you would like to combine (*see Figure 1.18*).

Note	a) *To select two documents at once, hold down the **CTRL** key and select the two documents you wish to combine with your curser.* b) *Only two documents are able to be selected at a time when combining documents.*

2. Right click on one of the selected documents. An option window will appear (*see Figure 1.18*).
3. Click on the **Combine** button (*see Figure 1.18*).
4. Select which document you want to insert before or after the other document (*see Figure 1.18*).

Figure 1.18



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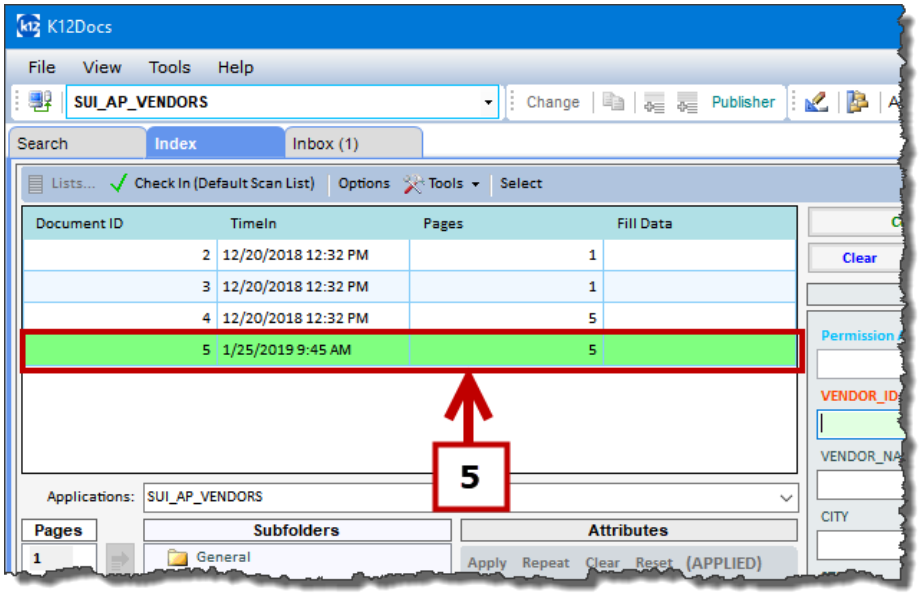
5. The selected documents are now combined into a single document (*see Figure 1.19*).

Figure 1.19



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Deleting

Deleting allows you to delete a single page, a single document, or all documents from the selected index document list. To delete a page/document, follow the steps listed below:

Deleting a Document

To delete a document, follow the steps listed below:

Steps:

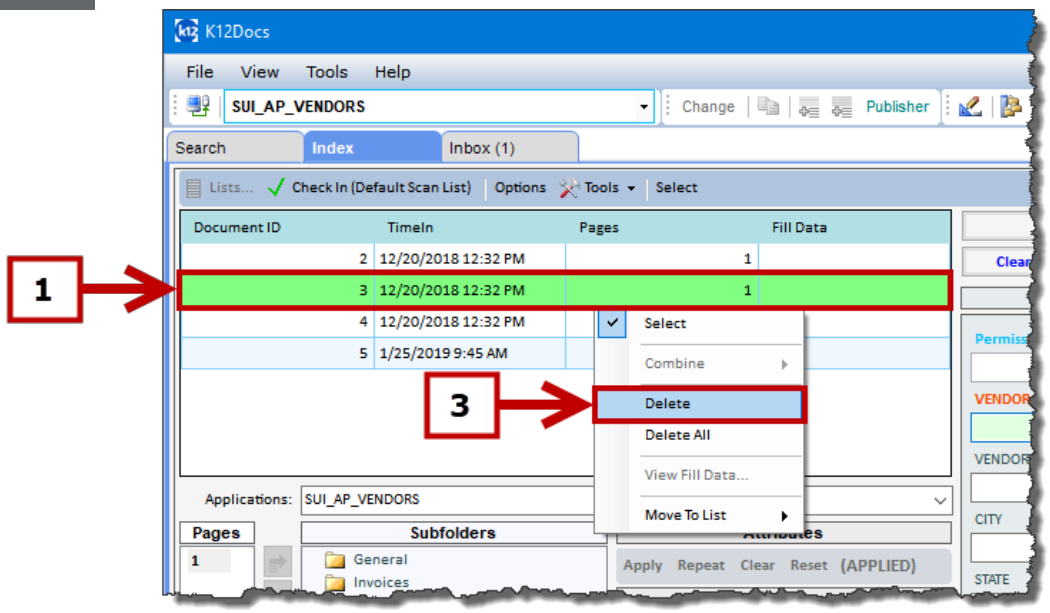
1. Select the document you would like to delete (see *Figure 1.20*).

Note	a) *To delete multiple documents at once, hold down the **CTRL** key and select the documents you wish to delete.*

2. Right click on the selected document. An option window will pop up (see *Figure 1.20*).
3. Click on the **Delete** button (see *Figure 1.20*).

Note	a) *If you want to delete all of the documents, select the **Delete All** button.*

Figure 1.20



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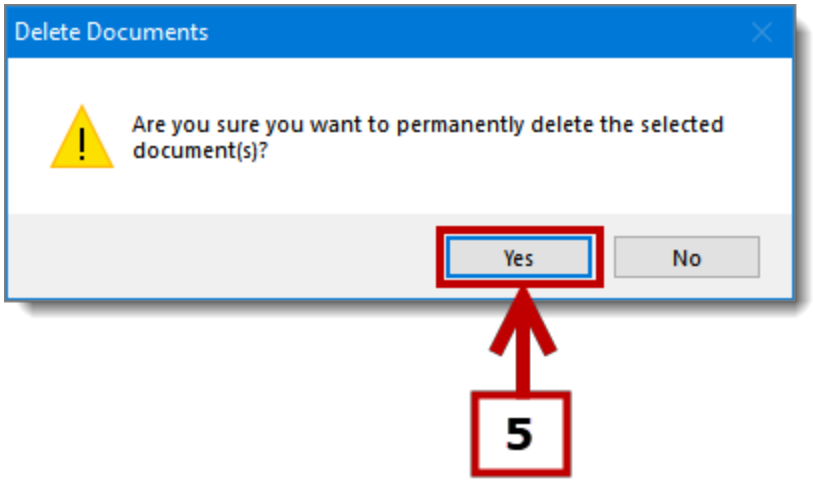
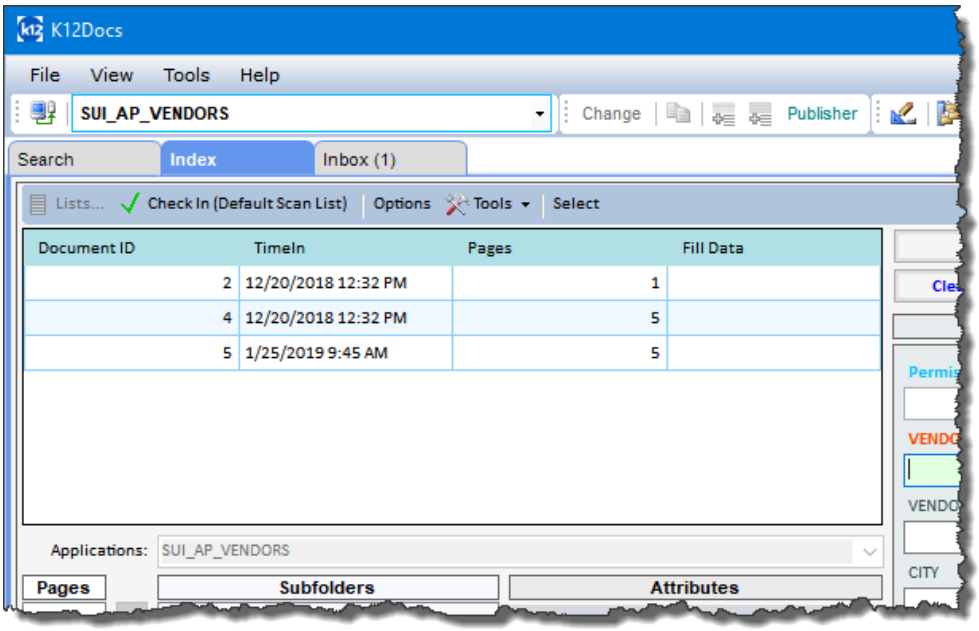
4. A **Delete Documents** window will pop up asking if you want to delete the selected document (*see Figure 1.21*).
5. Click on the **Yes** button (*see Figure 1.21*).

Figure 1.21



6. The selected document is now deleted (*see Figure 1.22*).

Figure 1.22



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Deleting a Page

To delete a single page, follow the steps listed below:

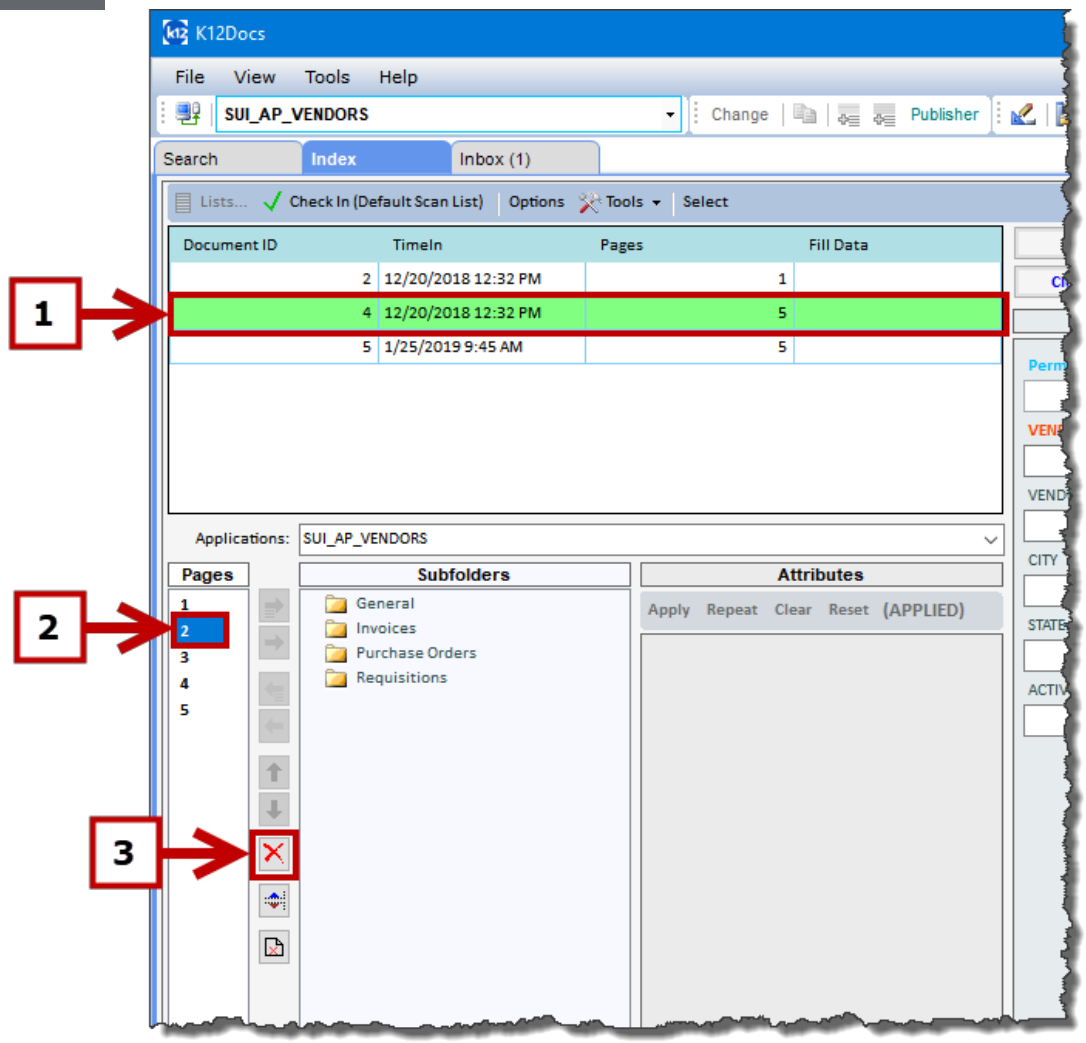
Steps:

1. Select the document the page is located in (*see Figure 1.23*).
2. Select the page you wish to delete (*see Figure 1.23*).

> **Note** *a) To delete multiple pages at once, hold down the **CTRL** key and select the pages you wish to delete.*

3. Click on the **Delete Page** button (*see Figure 1.23*).

Figure 1.23



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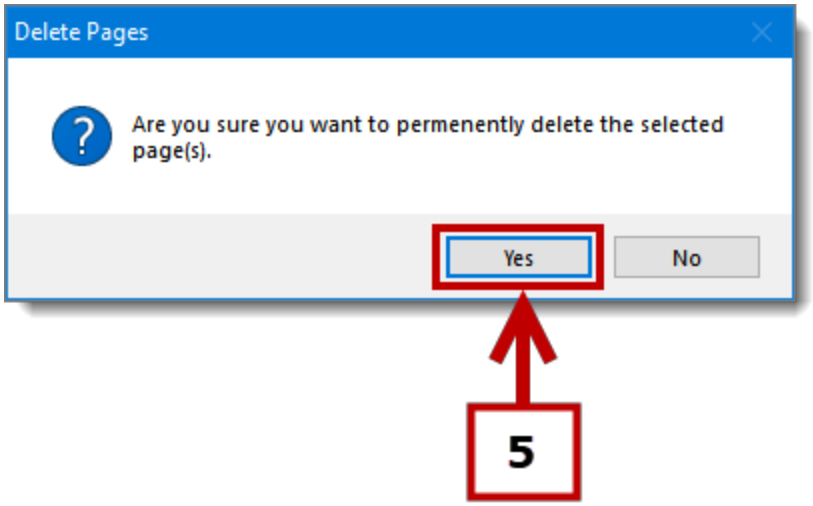
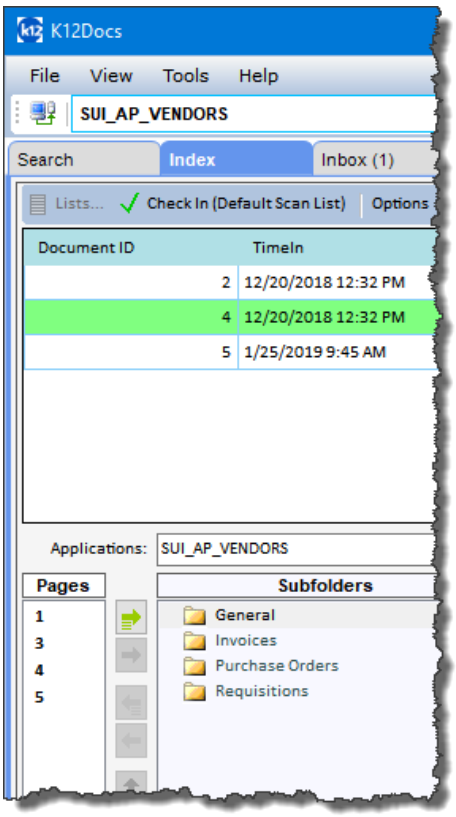
4. A **Delete Pages** window will pop up asking if you want to delete the selected page (*see Figure 1.24*).
5. Click on the **Yes** button (*see Figure 1.24*).

Figure 1.24



6. The selected page is now deleted (*see Figure 1.25*).

Figure 1.25



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Page Rotation

Page rotation allows you to rotate all pages within a selected document to a new position or a selected page within a selected document to a new position. To rotate a page(s), follow the steps listed below:

Steps:

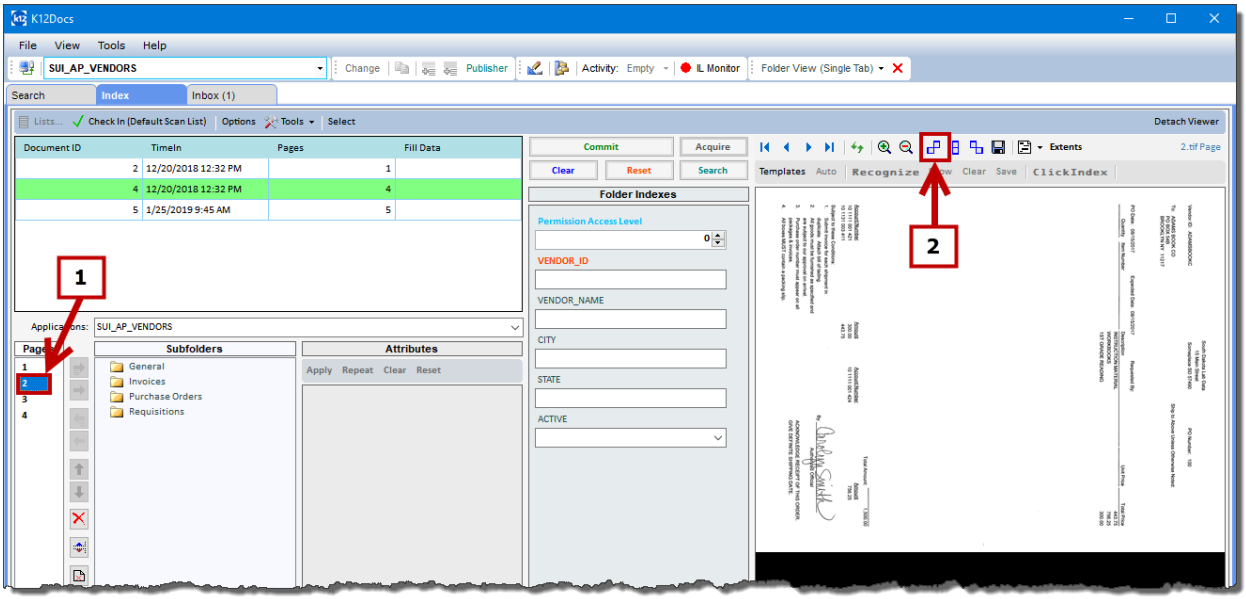
1. Select the page you want to rotate (*see Figure 1.26*).
2. Choose one of the three rotation buttons to rotate the selected page in the desired direction (*see Figure 1.26*).

   a. **Rotate Left** – Rotates the selected page 90 degrees to the left.

   b. **Flip** – Rotates the selected page 180 degrees.

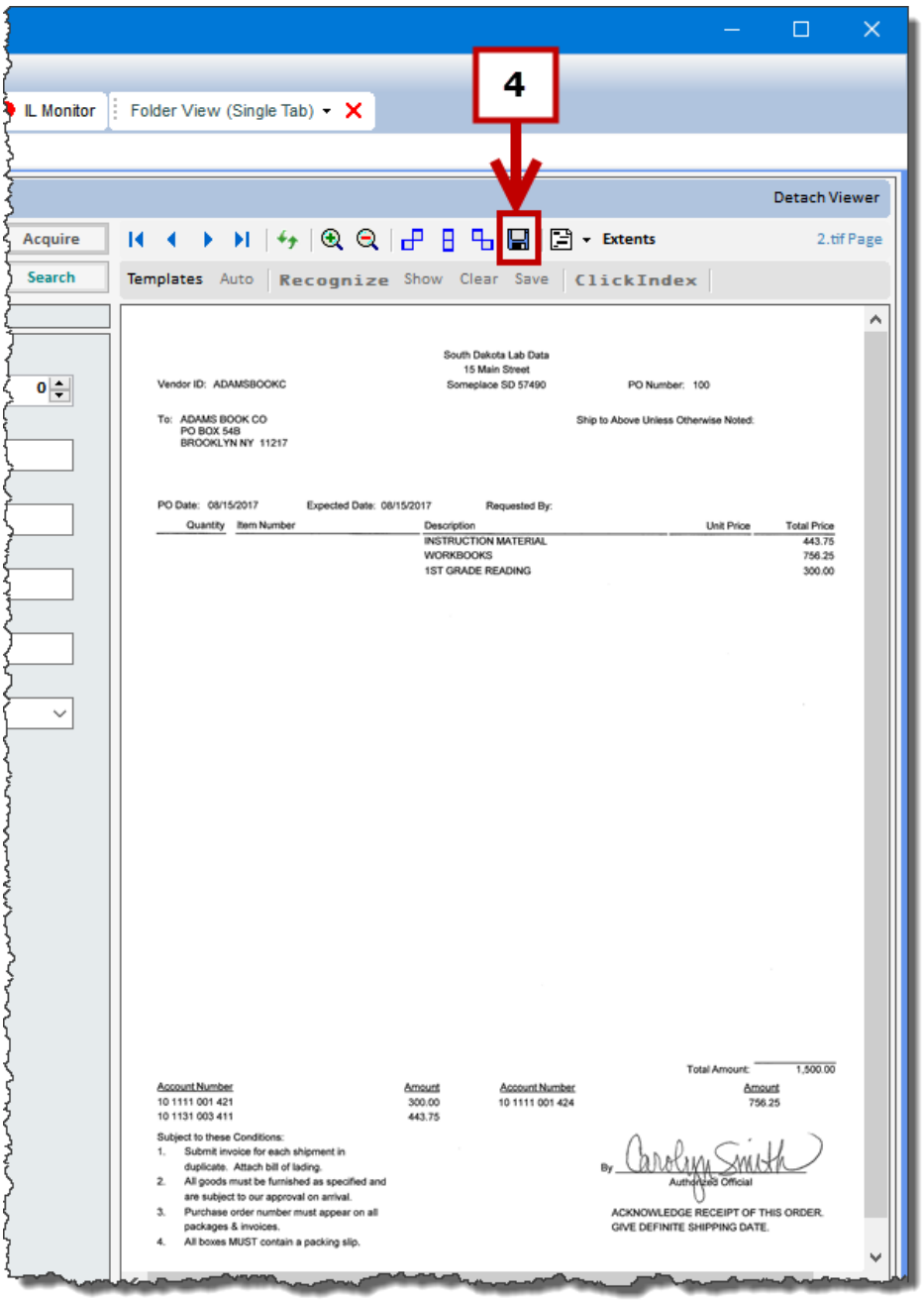
   c. **Rotate Right** – Rotates the selected page 90 degrees to the right.

Figure 1.26



3. The selected page is now rotated to the desired position (*see Figure 1.27*).
4. To save the selected page in its new position, click on the **Save Rotated Page** button (*see Figure 1.27*).

Figure 1.27



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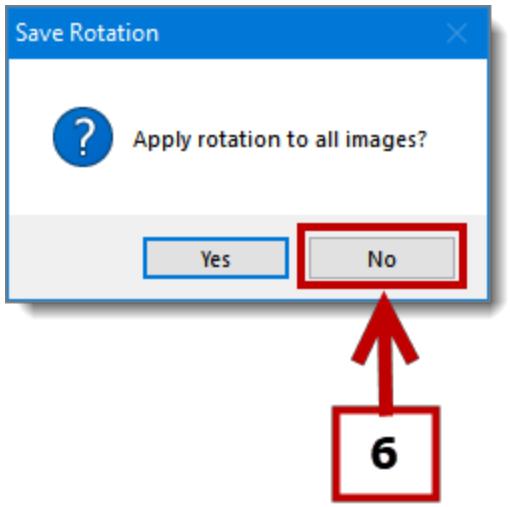
5. A **Save Rotation** window will pop up (*see Figure 1.28*).
6. Click on the **No** button to only apply the rotation to the selected page (*see Figure 1.28*).

> *Note* *a) If you want to rotate all of the pages in the document in the selected direction, click on the **Yes** button.*

Figure 1.28



7. The selected page is now rotated and saved.

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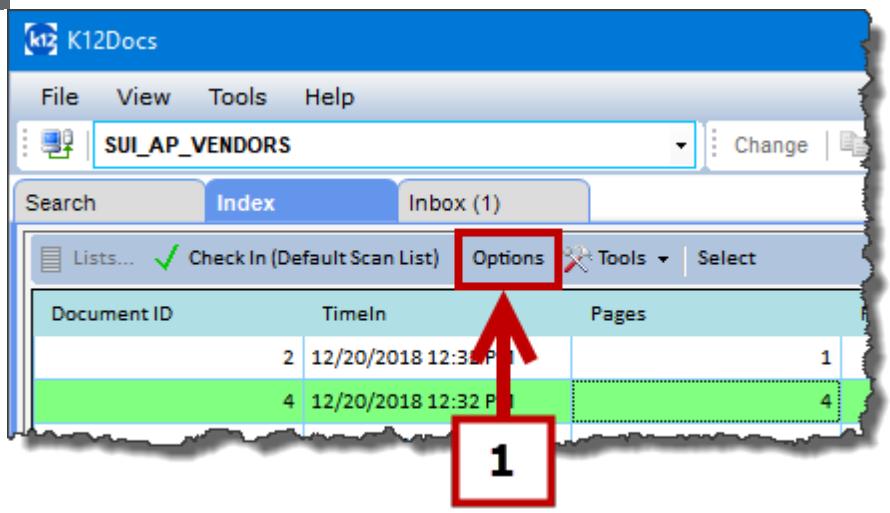
Indexing Options

The Indexing options allow you to customize how you index a document. To apply Indexing Options, follow the steps listed below:

Steps:

1. Click on the **Options** button, located on the **Index** tab (*see Figure 1.29*).

Figure 1.29



2. An **Indexing Options** window will pop up (*see Figure 1.30*).
3. Select the options you want to apply (*see Figure 1.30*).
    a. **Enable Auto Exchange –** If the selected document has meta data associated with it, the data will be automatically applied.
    b. **Enable Auto Acquire –** If the selected application has been configured to retrieve folder index data from a third party software based on the information entered into one of the folder index fields, this option will automatically acquire the rest of the folder index information for the selected document and place it into the configured folder index fields.
    c. **Post Commit (Retain Index Values) –** After a document has been indexed, this option will retain the values previously entered into the folder index fields to be used with another document.
    d. **Do not show commit/append confirmation window –** This option will prevent the Commit/Append Confirmation window from appearing.
    e. **Enable Auto Open Non-Image Pages Natively –** Allows you to view virtual files automatically in the original application they were created in.

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f. **Enable detached viewer always on top –** If the indexing image viewer is detached, it will always remain on top of any other K12Docs GX windows that are opened.

g. **Hide folder permission access level –** This option hides the Permission Access Level field located in the Folder Indexes area.

h. **Move pages to Document on select (non-subfolder application) –** If an application does not have any subfolders, this option will automatically move the pages of a document into the default subfolder when the document is selected.

i. **Enable Date Picker for date fields –** This option will add a calendar widget icon next to all date fields allowing you to choose a date from a calendar pop up.

j. **Post Commit –** Choose what should happen to the selected document listed in the index document list after it is indexed.

    i. **Prompt for Action –** A Post Commit window will pop up, allowing you to manually choose what will happen to the selected document. The options to choose from are *Preserve entire document, Preserve document with unindexed pages, or Delete entire document from the list*.

    ii. **Preserve entire document –** This option will automatically keep the selected document in the index document list until you manually delete it, allowing for the selected document to be indexed into multiple folders.

    iii. **Preserve document with unindexed pages –** If you decide to index only part of the selected document, this option will automatically keep the remainder of the document that is unindexed in the index document list until it is indexed.

    iv. **Delete entire document from the list –** This option will automatically delete the selected document from the index document list.

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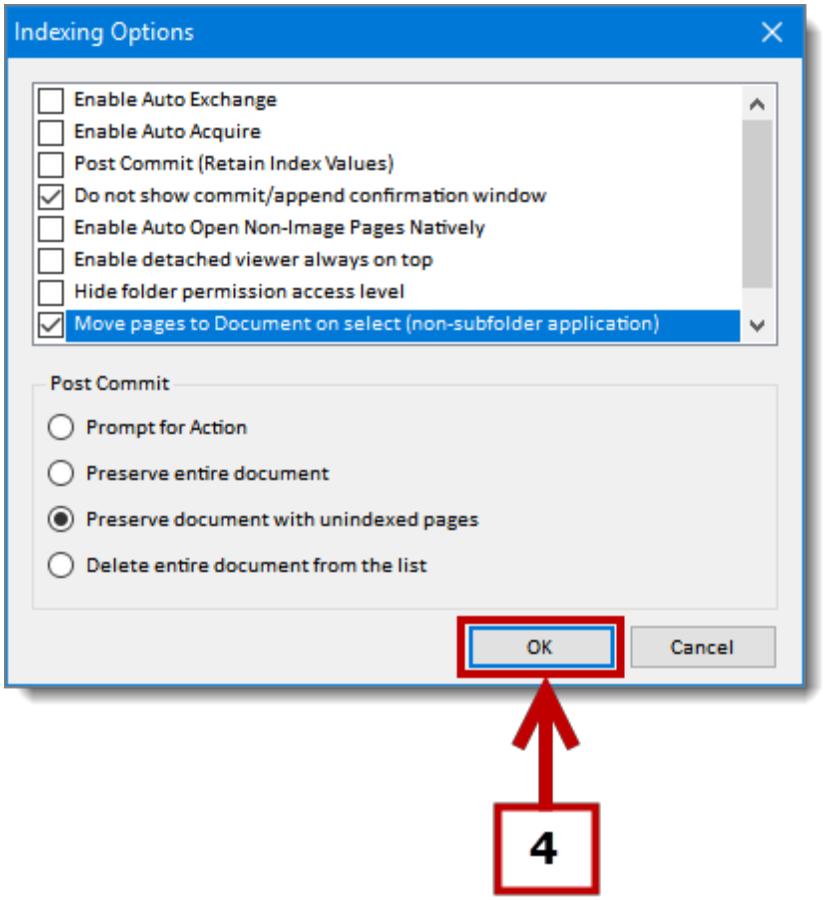
4. Click on the **OK** button (*see Figure 1.30*).

Figure 1.30



5. The selected indexing options are now applied.

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