



K12Docs End User Manual

EMPLOYEE_ID	LAST_NAME	FIRST_NAME	SSN	DEPARTMENT	EMPLOYEE_STATUS	LOCATION	DATE_OF_HIRE	DATE_OF_TERMINATION	TEST	CreateUser	CreateTime
41000	Eckard	Michael	111-11-1111	IT	Active	Dallas	05/01/2001			hsmadmin	07/20/2023 16:44:08
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011			hsmadmin	10/29/2023 21:46:34
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011			hsmadmin	10/29/2023 21:49:01
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011			hsmadmin	10/29/2023 21:49:01
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011			hsmadmin	10/29/2023 21:58:52
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011			hsmadmin	10/29/2023 21:47:57
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011			hsmadmin	03/01/2024 09:54:14
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011			hsmadmin	10/29/2023 21:46:04
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011			hsmadmin	10/29/2023 21:46:54
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011			hsmadmin	10/29/2023 22:11:03
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011			hsmadmin	10/29/2023 21:45:09
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011			hsmadmin	10/29/2023 21:49:23
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011			hsmadmin	10/29/2023 22:11:51

Date	Pages/Files	Year	Administrative Document Type	Misc
10/29/2023	1-2 2	2023	Application	
10/29/2023	3-8 6	2023	Background Check	
10/29/2023	9-9 1	2023	Drivers License	
03/01/2024	10-11 2	2024	Application	

VER. 2001

Application for Employment

APPROVED

Position(s) applied for: Administrative Assistant II Date of application: 3/20/00

Name: Ashford Paulette Social Security #: 999-99-9999

Address: 143 Helen Rd. Columbus OH 43201

Telephone #: (614) 455-5166 Mobile/Beeper/Other #: e-mail Address:

If you are under 18, and it is required, can you furnish a work permit? ☐ Yes ☒ No

Have you ever been employed here before? If yes, give dates and positions ☐ Yes ☒ No

Are you legally eligible for employment in this country? ☒ Yes ☐ No

Date available for work: 3/21/00 What is your desired salary range? \$28,000

Type of employment desired: ☒ Full-Time ☐ Part-Time ☐ Temporary ☐ Seasonal ☐ Educational Co-Op

Are you able to meet the attendance requirements of the position? ☐ Yes ☒ No

Have you ever pled "guilty" or "no contest" to, or been convicted of a crime? ☐ Yes ☒ No

If yes, please provide date(s) and details

Answering "yes" to these questions does not constitute an automatic bar to employment. Factors such as date of the offense, seriousness and nature of the violation, rehabilitation and position applied for will be taken into account.

Driver's license number if driving is an essential job function: State:

Employment History

Starting with your most recent employer, assignments or volunteer activities, provide the following information.

From: 2/98 To: 3/00 Employer: Ohio State University Telephone #: (614) 262-0762

Street Address: 143 Helen Rd. City: Columbus OH

No part of this document may be reproduced or transmitted in any form for or by any means, electronic or mechanical, including photocopying or recording, for any purpose without the express written permission of Software Unlimited Inc. The software described in this document is furnished under a license agreement or nondisclosure agreement. It is against the law to copy the software on any medium except as specifically allowed in the license or nondisclosure agreement.

Copyright © 2024 Software Unlimited Inc. All rights reserved.



Table of Contents

Login:.....	4
Selecting an Application:.....	6
Searching: Folder Level	7
Searching: Folder Level (Documents)	10
Searching: Document Attributes	13
Searching: Full Text	16
Searching Portfolio: Bookmarks/Notes	19
Searching Portfolio: Create Time/Create User	21
Searching Portfolio: Electronic File Title	23
Searching Portfolio: Document Attributes	25
Searching Portfolio: Fulltext	27
Searching Portfolio: Document Attribute Fields in Subfolder	29
Publishing: Quick Print of Page in Image Viewer	30
Publishing: PDF a Folder	32
Publishing: PDF a Document	35
Importing: Add an Electronic Document to a Folder	38
Transfer in Same Folder: Move a Document to Another Subfolder	42
Transfer in Same Folder: Move a Page to Another Subfolder	44
Transfer to Another Folder: Move a Document	46
Transfer to Another Folder: Move an Entire Subfolder of Documents	49
Modify: Folder Indexes	52
Modify: Document Attributes.....	54
Notes: Folder	56
Notes: Page	58
Bookmarks:	60
Annotations:.....	62
<i>Annotations: Highlighter</i>	<i>62</i>
<i>Annotations: Box</i>	<i>64</i>
<i>Annotations: Text</i>	<i>66</i>
<i>Annotations: Stamp</i>	<i>68</i>



<i>Annotations: Additional Options</i>	70
Redactions:.....	71
Delete: Folder.....	74
Delete: Document	75
Delete: Page	76
Adding a New Folder:.....	78
E-Sign Documents:	79
Rotation: Page.....	82
Sorting: Document Attribute Fields in Folder	84
Exporting Search Results:.....	85
Indexing: Opening Document Indexing HUB	86
Indexing: Indexing/Filing a Document	87
Indexing: Separating a Document from a Bulk Scan.....	92
Indexing: Empty Indexing List After All Documents Indexed/Filed	93
Indexing: Deleting a Page.....	94
Indexing: Deleting a Document	95
Indexing: Deleting All Checked-Out Documents in Indexing List	96



Login:

To access K12Docs, you must first login with your user credentials, as assigned by the System Administrator. To login to K12docs, follow the steps listed below:

Steps:

1. Go to the **K12Docs** web page.
2. Enter the domain name into the **Domain Name** field.
3. Enter your user name into the **User Name** field.
4. Click on the **Continue** button.

A screenshot of a web browser window displaying the K12Docs Signin page. The browser's address bar shows the URL `intellicloud2.intellinetics.com/intellicloudvue/signin`, which is highlighted with a red rectangle. The page features the K12Docs logo in the top left and the copyright notice "© 2024 Intellinetics, Inc." in the top right. The main heading is "Signin". Below it, a form is displayed with two input fields: "Domain Name" containing the text "ABC_Company" and "User Name" containing the text "abeck". This form is enclosed in a red rectangular box. A "Continue" button is located at the bottom of the form.

5. Enter your password into the **Password** field.
6. Click on the **Signin** button.

A screenshot of the K12Docs Signin page, showing the second step of the login process. The page layout is consistent with the previous screenshot, including the K12Docs logo and the "© 2024 Intellinetics, Inc." notice. The "Signin" heading is centered. Below it, a form is displayed with a single input field labeled "Password" containing seven dots. This field is highlighted with a red rectangular box. At the bottom of the form, there are two buttons: "Signin" (in green text) and "Back" (in blue text).



7. You will now be logged into **K12Docs**.

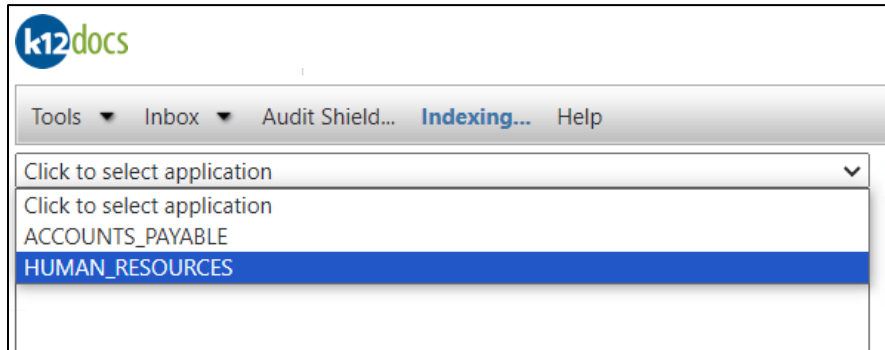
A screenshot of the K12Docs web application interface. The interface has a top navigation bar with the K12Docs logo, a user profile icon, and a menu with items: Tools, Inbox, Audit Shield..., Indexing..., and Help. Below the navigation bar is a search bar with a dropdown menu labeled 'Click to select application'. The main content area is split into two columns: the left column is for selecting folders, and the right column is for search results. At the bottom, there are buttons for 'Folders', 'Search', 'Clear', 'Reset', and 'Add Folder'. There is also a checkbox for 'Use OR' and a button for 'Export'. A status bar at the bottom indicates the condition: 'Condition: Replace 'AND' with 'OR''.

Selecting an Application:

After you have logged into K12docs, an application needs to be selected. To select an application, follow the steps listed below:

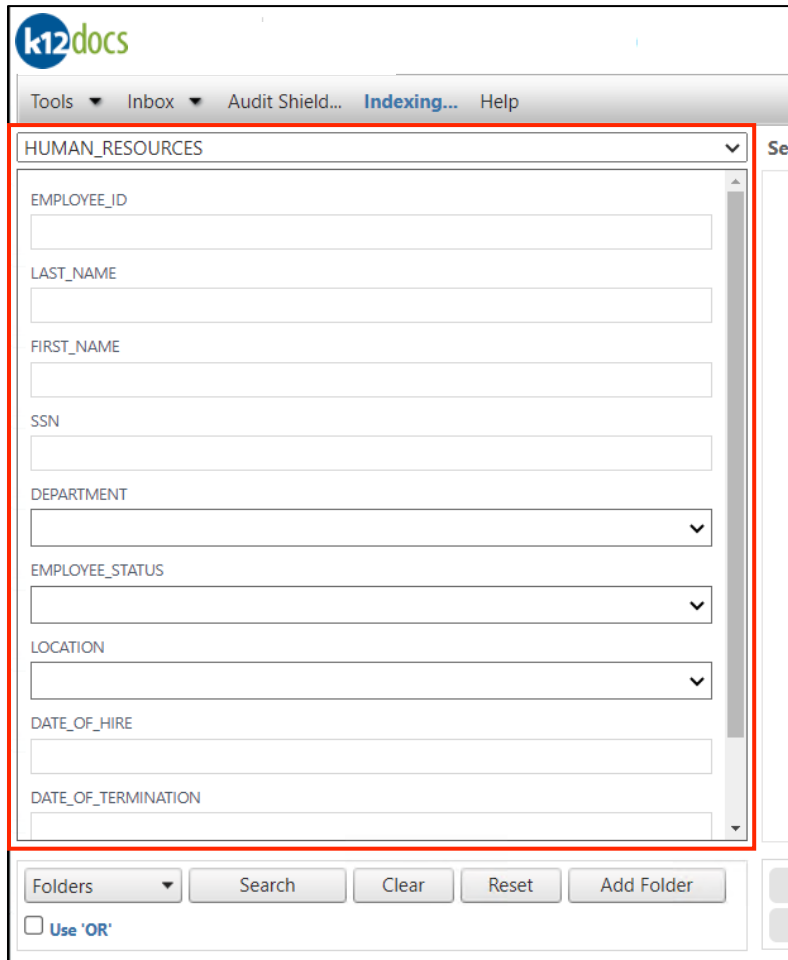
Steps:

1. Once logged in, select an **Application** from the application dropdown list.



The screenshot shows the K12docs interface with a dropdown menu open for selecting an application. The menu is titled "Click to select application" and lists two options: "ACCOUNTS_PAYABLE" and "HUMAN_RESOURCES". The "HUMAN_RESOURCES" option is highlighted in blue.

2. Once selected, the application will load.



The screenshot shows the K12docs interface with the "HUMAN_RESOURCES" application selected. The form contains several input fields for employee information: EMPLOYEE_ID, LAST_NAME, FIRST_NAME, SSN, DEPARTMENT (dropdown), EMPLOYEE_STATUS (dropdown), LOCATION (dropdown), DATE_OF_HIRE, and DATE_OF_TERMINATION. The form is outlined with a red border.

Searching: Folder Level

When searching at the Folder level, each individual record/row displayed in the search results area will represent a unique folder relevant to the search criteria. To perform a folder level search, follow the steps listed below:

Note a) By default, the Folder search setting is auto enabled when you login to K12Docs.

Steps:

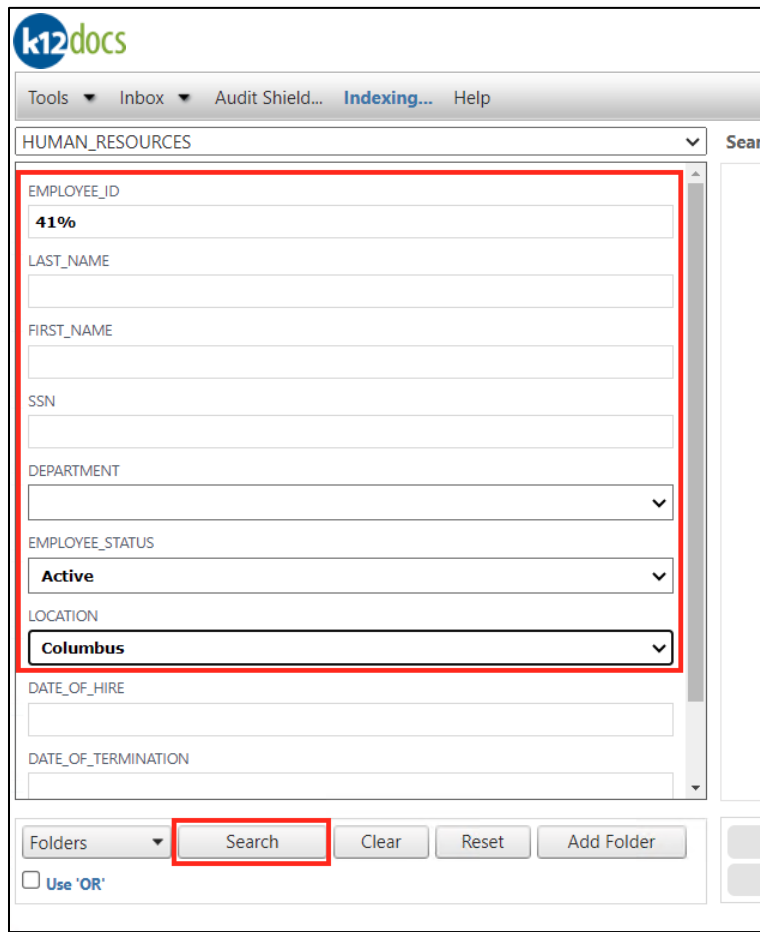
1. Enter your search criteria into the provided fields.

Note

A **Wildcard** search can be used in any of the Folder index fields. Below is a list of examples of how the Wildcard search works:

<u>Symbol</u>	<u>Meaning</u>	<u>Example of Use</u>	<u>Example of Returned Results</u>
%	Wildcard	BO%	<u>B</u> onnie <u>B</u> ob
		%NN%	T <u>n</u> nessee
		%34	Pen <u>n</u> sylvania 500 <u>3</u> 4 AK12 <u>3</u> 4

2. Click on the **Search** button.



The screenshot shows the K12Docs search interface. At the top, there's a navigation bar with 'Tools', 'Inbox', 'Audit Shield...', 'Indexing...', and 'Help'. Below this is a dropdown menu showing 'HUMAN_RESOURCES'. The main search area contains several input fields: 'EMPLOYEE_ID' (with '41%' entered), 'LAST_NAME', 'FIRST_NAME', 'SSN', 'DEPARTMENT' (a dropdown menu), 'EMPLOYEE_STATUS' (with 'Active' selected), 'LOCATION' (with 'Columbus' selected), 'DATE_OF_HIRE', and 'DATE_OF_TERMINATION'. At the bottom, there's a 'Folders' dropdown, a 'Search' button (highlighted with a red box), 'Clear', 'Reset', and 'Add Folder' buttons. There's also a checkbox for 'Use OR'.

3. Your search results will appear on the right side of the window.
4. Select the folder you want to open and view from the results list.

Note

- a) If you have more than one page of search results, use the buttons below the search results area to navigate to the next page of results.
- b) If you want to clear your search criteria and results, select the **Clear** button located under the Folder Indexes area.
- c) To sort the columns, click on any of the column headers.

Search Results (Folders)						
EMPLOYEE_ID	LAST_NAME	FIRST_NAME	SSN	DEPARTMENT	EMPLOYEE_STATUS	LOCATION
41001	Ashford	Paulette	999-99-9999	IT	Active	Colorado
41002	Powers	Jay	777-77-7777	Human Resources	Active	Colorado

Folder

First

Previous

Next

Last

Page 1 of 1 (2 Items)

Export

- The selected folder will open in a new tab into the Portfolio View, displaying the subfolders and documents.

Note

a) If the subfolder name is colored green, it contains content. If the subfolder name is colored orange, it does not contain content.

The screenshot displays the k12docs web application interface. On the left, a sidebar shows a folder structure under 'HUMAN_RESOURCES / abeck'. The 'Administration' folder is highlighted in green. The main area shows a table of documents:

Date	Pages/Files	Year	Administrative Document Type	Misc
10/29/2023	1-2 2	2023	Application	
10/29/2023	3-8 6	2023	Background Check	
10/29/2023	9-9 1	2023	Drivers License	
03/01/2024	10-11 2	2024	Application	

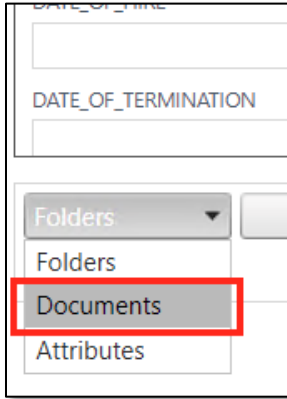
On the right, a preview of the 'Application for Employment' form (VER. 2001) is shown. The form includes fields for personal information, employment history, and contact details. The preview is at 68% zoom.

Searching: Folder Level (Documents)

When searching at the Document level, the results are folder based, but document level details display in the results area. To perform a document level search, follow the steps listed below:

Steps:

1. To enable the **Document** search setting, click on the **Search** drop down button, below the search fields.
2. Select the **Documents** option.

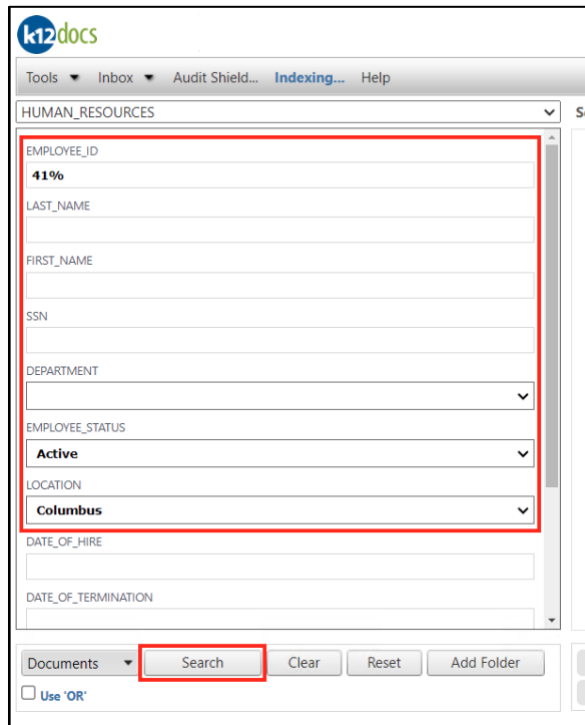


3. The search fields will update to reflect the Documents search option.
4. Enter your search criteria into the provided fields.

Note A **Wildcard** search can be used in any of the Folder index fields. Below is a list of examples of how the Wildcard search works:

<u>Symbol</u>	<u>Meaning</u>	<u>Example of Use</u>	<u>Example of Use Results</u>
%	Wildcard	BO%	<u>B</u> onnie <u>B</u> ob
		%NN%	T <u>en</u> nessee Pe <u>nn</u> sylvania
		%34	500 <u>34</u> AK12 <u>34</u>

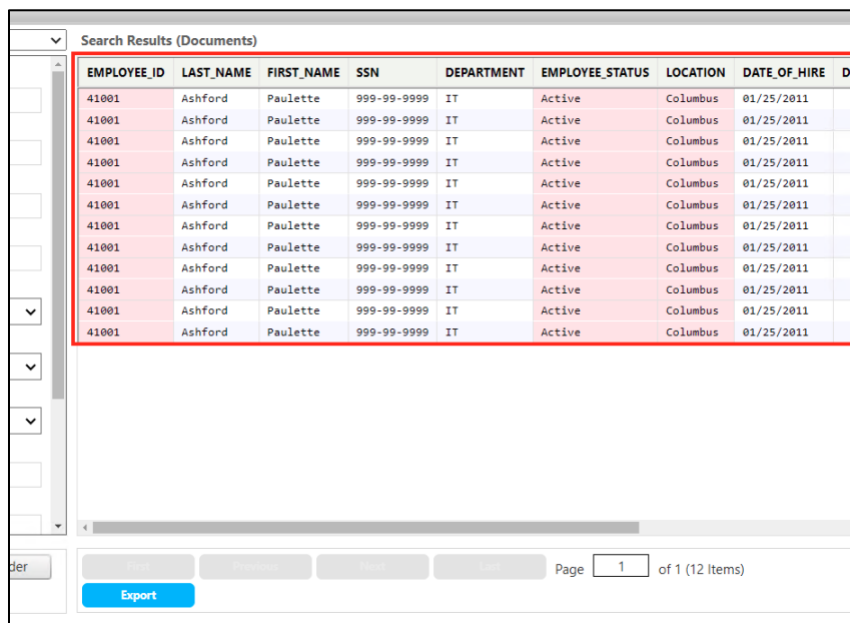
5. Click on the **Search** button.



6. Your search results will appear on the right side of the window.
7. Select the document you want to view from the results list.

Note

- a) If you have more than one page of search results, use the buttons below the search results area to navigate to the next page of results.
- b) If you want to clear your search criteria and results, select the **Clear** button located under the Folder Indexes area.
- c) To sort the columns, click on any of the column headers.

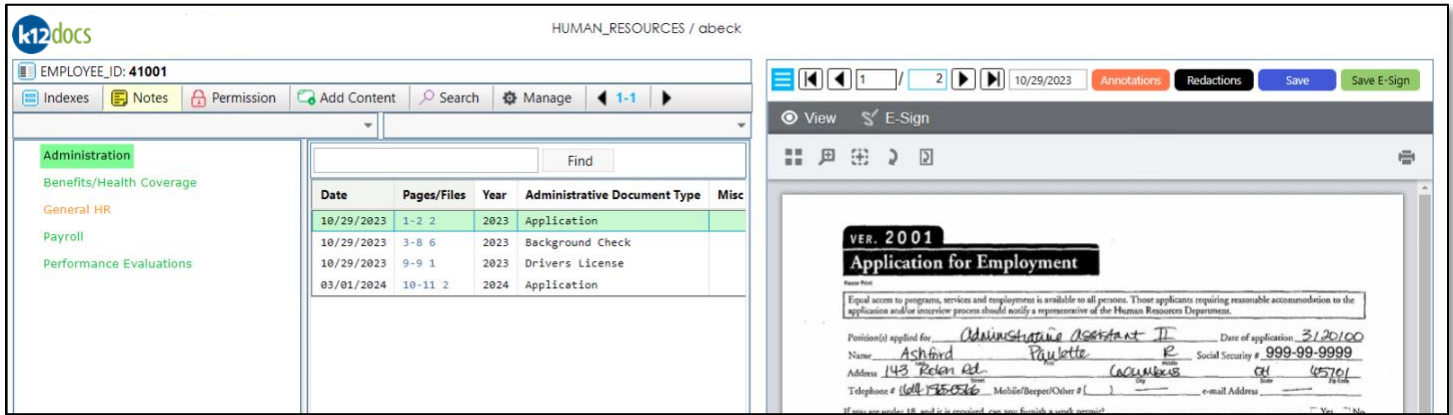


EMPLOYEE_ID	LAST_NAME	FIRST_NAME	SSN	DEPARTMENT	EMPLOYEE_STATUS	LOCATION	DATE_OF_HIRE	DATE_OF_TERMINATION
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011	
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011	
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011	
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011	
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011	
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011	
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011	
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011	
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011	
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011	
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011	
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011	

8. The selected document will open in a new tab into the Portfolio View, displaying automatically on the right side of the window.

Note

a) If the subfolder name is colored green, it contains content. If the subfolder name is colored orange, it does not contain content.



EMPLOYEE_ID: 41001

Indexes | Notes | Permission | Add Content | Search | Manage | 1-1

Administration
Benefits/Health Coverage
General HR
Payroll
Performance Evaluations

Date	Pages/Files	Year	Administrative Document Type	Misc
10/29/2023	1-2 2	2023	Application	
10/29/2023	3-8 6	2023	Background Check	
10/29/2023	9-9 1	2023	Drivers License	
03/01/2024	10-11 2	2024	Application	

VER. 2001
Application for Employment

Equal access to programs, services and employment is available to all persons. Those applicants requiring reasonable accommodation to the application and/or interview process should notify a representative of the Human Resources Department.

Please Print

Position(s) applied for: Administrative Assistant II Date of application: 3/20/00

Name: Ashford Payette Social Security #: 999-99-9999

Address: 143 Belton Rd Columbus GA 31901

Telephone # (cell) 706-556-0516 Mobile/Beepers/Other # () e-mail Address: _____

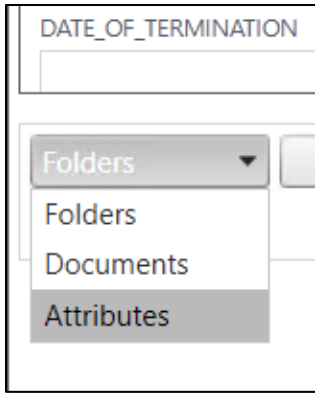
If you are under 18, and it is verified, you may finish a youth account. Yes No

Searching: Document Attributes

When searching for documents via the Document Attributes option, the documents displayed in the search results area are based on the document attributes. Each individual record/row displayed in the results area will represent a document. To perform a Document Attribute search, follow the steps listed below:

Steps:

1. To enable the **Document Attribute** search setting, click on the **Search** drop down button, below the search fields.
2. Click on the **Attributes** option.



3. The Document Attribute fields will now become available.
4. Enter your search criteria into the provided fields.

Note

A **Wildcard** search can be used in any of the fields. Below is a list of examples of how the Wildcard search works:

<u>Symbol</u>	<u>Meaning</u>	<u>Example of Use</u>	<u>Example of Use Results</u>
%	Wildcard	BO%	B onnie B ob
		%NN%	Ten n essee Pen n sylvania
		%34	500 34 AK12 34

a) To distinguish the Document Attribute fields from the Folder Index fields, the Document Attribute fields are a **Blue** color and the Folder Index fields are a **Gray** color.

5. Click on the **Search** button.

Tools ▾ Inbox ▾ Audit Shield... Indexing... Help

HUMAN_RESOURCES ▾

(Create Time)

(Create User)

Year

Payroll Document Type ▾

Benefits Document Type ▾

Administrative Document Type ▾
Application

Misc Document Type ▾

Document Status ▾
Needs Reviewed

Document Date

Attributes ▾ Search Clear Reset Add Folder

☐ Use 'OR'

6. Your search results will appear on the right side of the window.
7. Select the document you want to view from the results list.

Note

- a) If you have more than one page of search results, use the buttons below the search results area to navigate to the next page of search results.
- b) If you want to clear your search criteria and results, select the **Clear** button located under the Folder Indexes area.
- c) To sort the columns, click on any of the column headers.

▼

Search Results (Attributes)

RST_NAME	SSN	DEPARTMENT	EMPLOYEE_STATUS	LOCATION	DATE_OF_HIRE	DATE_OF_TERMINATION	TEST	CreateUser	CreateTime	Page Count	Subfolder	Year	Payroll Document Type	Benefits Document Type	Administrative Document Type	Misc Document Type	Document Status	Document Date
hulette	999-99-9999	IT	Active	Columbus	01/25/2011			hsmadmin	03/01/2024 09:54:14	2	Administration	2024			Application		Needs Reviewed	03/01/2024 00:00
hulette	999-99-9999	IT	Active	Columbus	01/25/2011			hsmadmin	10/29/2023 21:58:52	2	Administration	2023			Application		Needs Reviewed	10/01/2023 00:00

Page 1 of 1 (2 Items)

Export

8. The selected document will open in a new tab into the Portfolio View, displaying automatically on the right side of the window.

Note

a) If the subfolder name is colored green, it contains content. If the subfolder name is colored orange, it does not contain content.

The screenshot displays the k12docs interface. On the left, a sidebar shows a folder structure under 'HUMAN_RESOURCES / abeck'. The 'Administration' folder is highlighted in green. The main area shows a table of documents:

Date	Pages/Files	Year	Administrative Document Type	Misc
10/29/2023	1-2 2	2023	Application	
10/29/2023	3-8 6	2023	Background Check	
10/29/2023	9-9 1	2023	Drivers License	
03/01/2024	10-11 2	2024	Application	

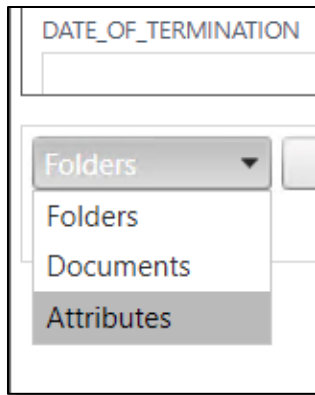
On the right, a preview of the 'Application for Employment' form (VER. 2001) is shown. The form includes fields for personal information, employment history, and a signature line. The 'Employment History' section is partially filled out with handwritten text.

Searching: Full Text

Full text searching allows you to run a search against documents that contain typed text. You can search for a specific word or phrase that may be contained within the typed text of the document(s). To perform a full text search, follow the steps below:

Steps:

1. Full text searching works best when searching at the **Document** or **Document Attribute** levels. To enable either of these, click on the **Search** drop down button, below the search fields.
2. Select the **Document** or **Attributes** option.



3. Enter your search criteria into the **Fulltext** field.

Note

Search Criteria Examples:

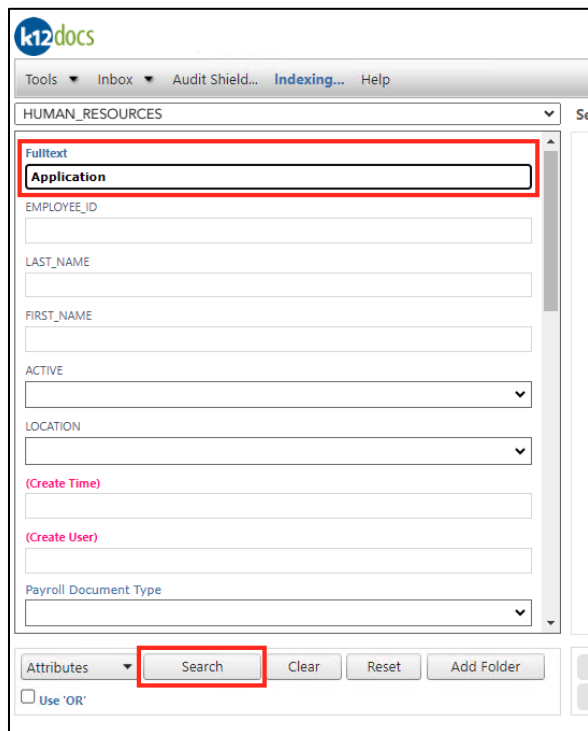
a) **Specific Word or Value:**

- If you were searching for a document that contained the word **Mountain**, you would enter **Mountain** into the Fulltext field.
- If you were searching for a document containing the year **2018**, you would enter **2018** into the Fulltext field.

b) **Phrase:**


- If you were searching for a document that contained the phrase **Employer Review**, you would enter **"Employer Review"** into the Fulltext field.
- **NOTE:** When you search for a phrase, make sure to place double quotation marks (" ") before and after the specific phrase. If no double quotation marks are added, the search will not work.

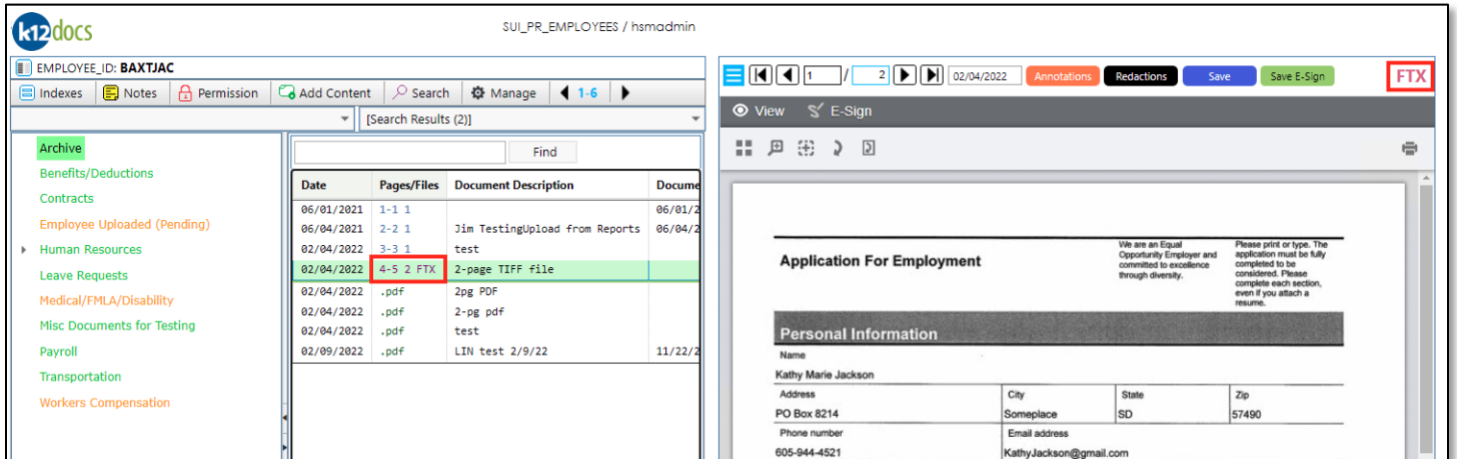
4. Click on the **Search** button.



5. Your search results will appear on the right side of the window.
6. Select the document you want to view from the results list.

Search Results (Attributes)									
EMPLOYEE_ID	LAST_NAME	FIRST_NAME	ACTIVE	LOCATION	CreateUser	CreateTime	Page Count	Subfolder	Payroll Document Type
BAXTJAC	GaviGaviBaxter	Jackie	Yes	High School	lin	02/04/2022 12:15:38	2	Archive	
KINGLIN	GaviGaviKing	Linda	Yes		sas	02/21/2024 13:09:09	2	Human Resources	
123456	Smith	John	New	Elementary	hsmadmin	12/02/2021 14:08:38	2	Human Resources	
123456	Smith	John	New	Elementary	hsmadmin	12/02/2021 13:18:58	2	Human Resources	
kathy	jackson	Kathy			sas	02/15/2024 16:18:41	2	Human Resources	
GREEDAL	Green	dale	Yes		sas	02/16/2024 13:17:15	2	Human Resources	
JACKKAT	Jackson	Kathy	Yes		sas	02/21/2024 11:29:55	2	Human Resources	

7. The selected document will open in a new tab into the Portfolio View, displaying automatically on the right side of the window.
 - a. Documents that match your full text search can be identified by the Pages number for the document, which will be displayed in a red color and have a “FTX” next to it.
 - b. Pages that match your full text search will have an  icon displayed at the top of the Image Viewer.



The screenshot displays the k12docs interface. On the left, a sidebar shows a navigation menu with categories like Archive, Benefits/Deductions, Contracts, and Human Resources. The main area shows a search results table for 'EMPLOYEE_ID: BAXTJAC'. The table has columns for Date, Pages/Files, Document Description, and Document. One row is highlighted in green, showing a document dated 02/04/2022 with 4-5 pages, labeled '2-page TIFF file', and marked with 'FTX'. To the right, a document viewer displays the 'Application For Employment' form, which includes a 'Personal Information' section with fields for Name, Address, City, State, Zip, Phone number, and Email address. The form is partially filled out with test data.

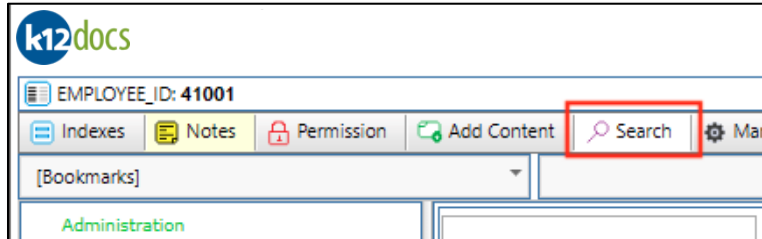
Date	Pages/Files	Document Description	Document
06/01/2021	1-1 1		06/01/2
06/04/2021	2-2 1	Jim TestingUpload from Reports	06/04/2
02/04/2022	3-3 1	test	
02/04/2022	4-5 2 FTX	2-page TIFF file	
02/04/2022	.pdf	2pg PDF	
02/04/2022	.pdf	2-pg pdf	
02/04/2022	.pdf	test	
02/09/2022	.pdf	LIN test 2/9/22	11/22/2

Searching Portfolio: Bookmarks/Notes

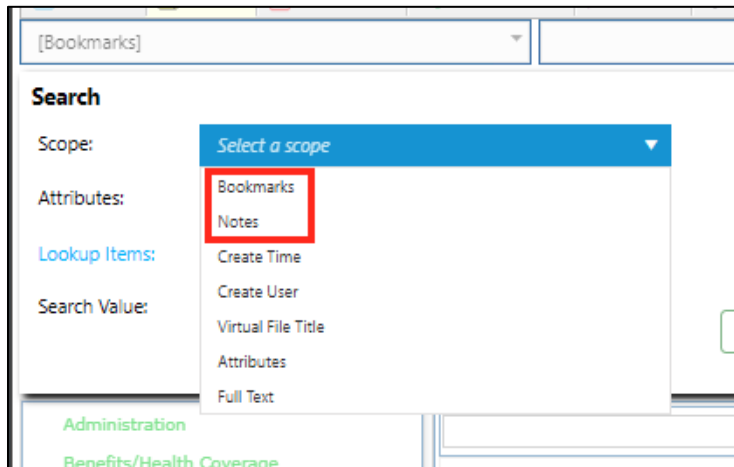
To search for Bookmarks/Notes in a folder, follow the steps listed below:

Steps:

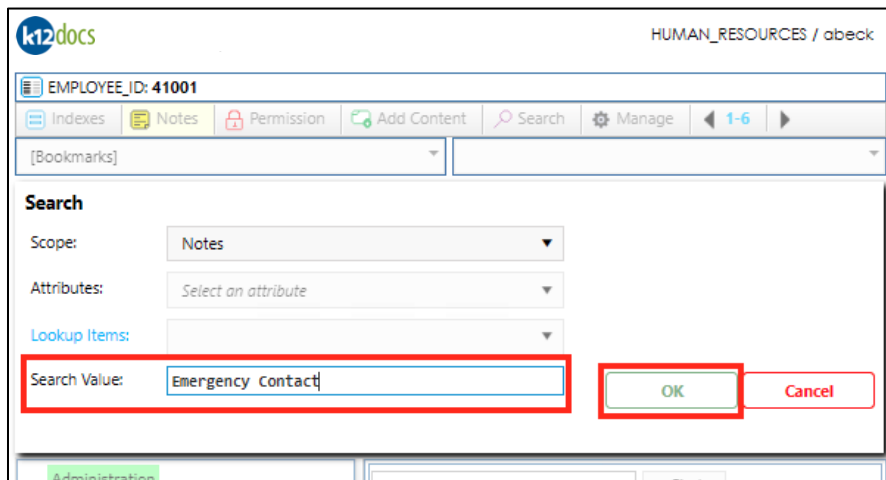
1. In the selected folder, click on the **Search** button.



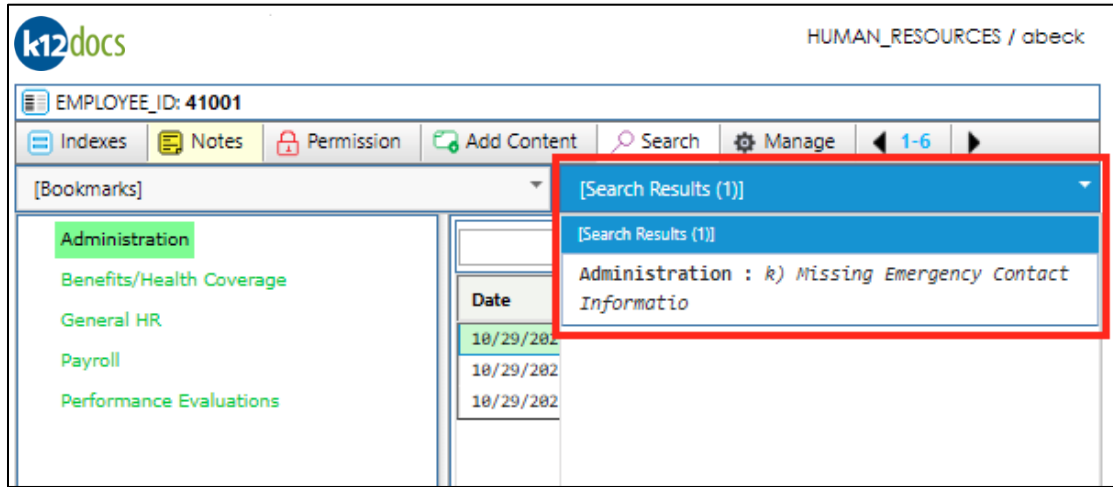
2. The **Search** window will expand.
3. Select **Bookmarks** or **Notes** from the Scope drop down list.



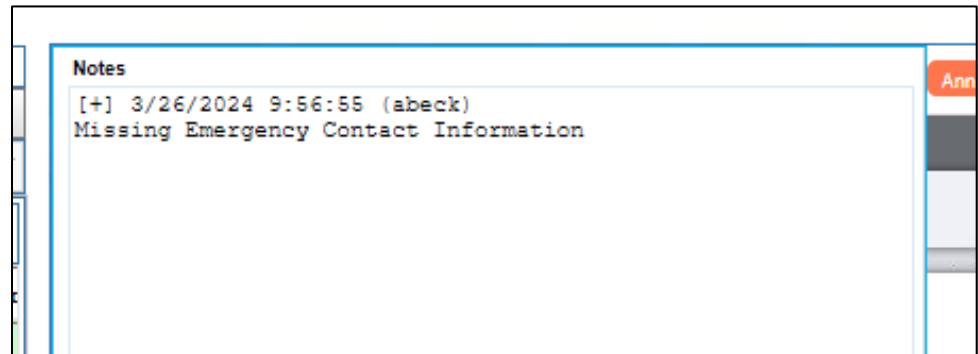
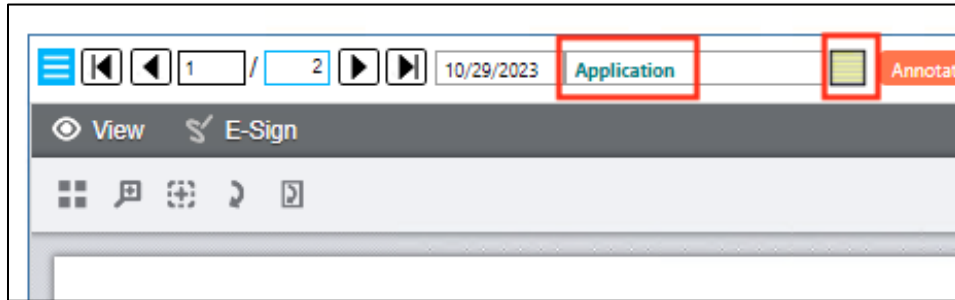
4. Enter your search value into the **Search Value:** field.
5. Click on the **OK** button.



6. The search results will be listed in the Search Results drop down.
7. Select the search result you want to view.



8. You will be taken to the page that contains the search results.
 - a. For Bookmarks, they will be listed above the page.
 - b. For Notes, click on the note icon above the page. The note details will then expand for review.

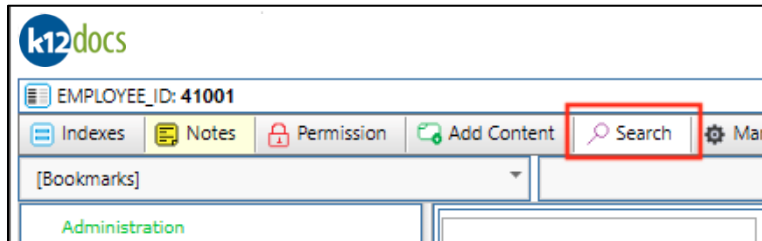


Searching Portfolio: Create Time/Create User

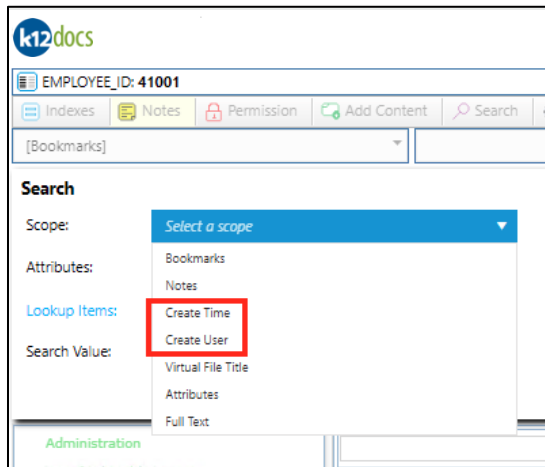
To search for documents based on their Create Time or the Create user who added them in a folder, follow the steps listed below:

Steps:

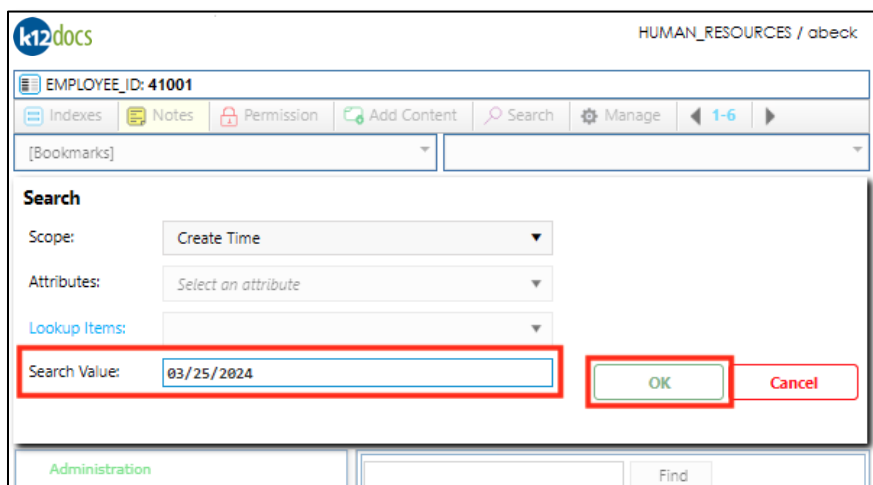
1. In the selected folder, click on the **Search** button.



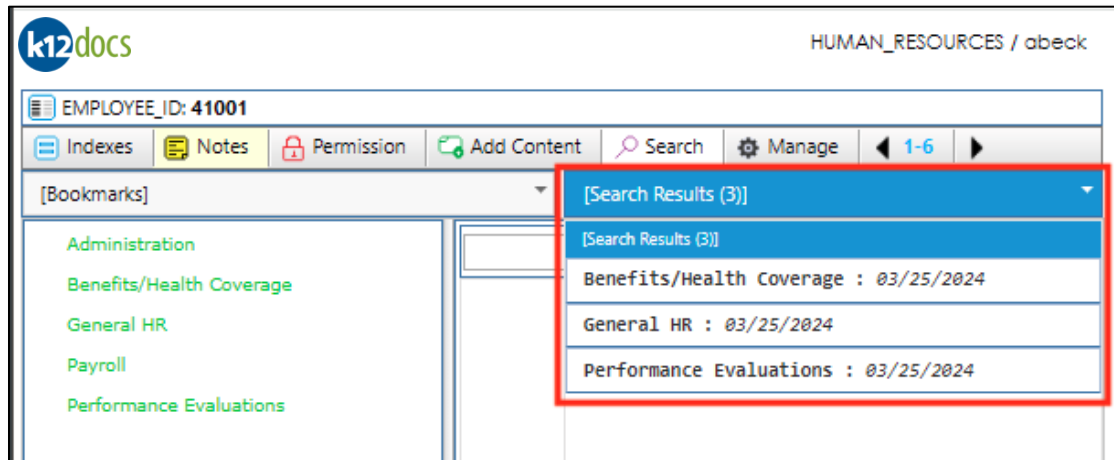
2. The **Search** window will expand.
3. Select **Create Time** or **Create User** from the Scope drop down list.



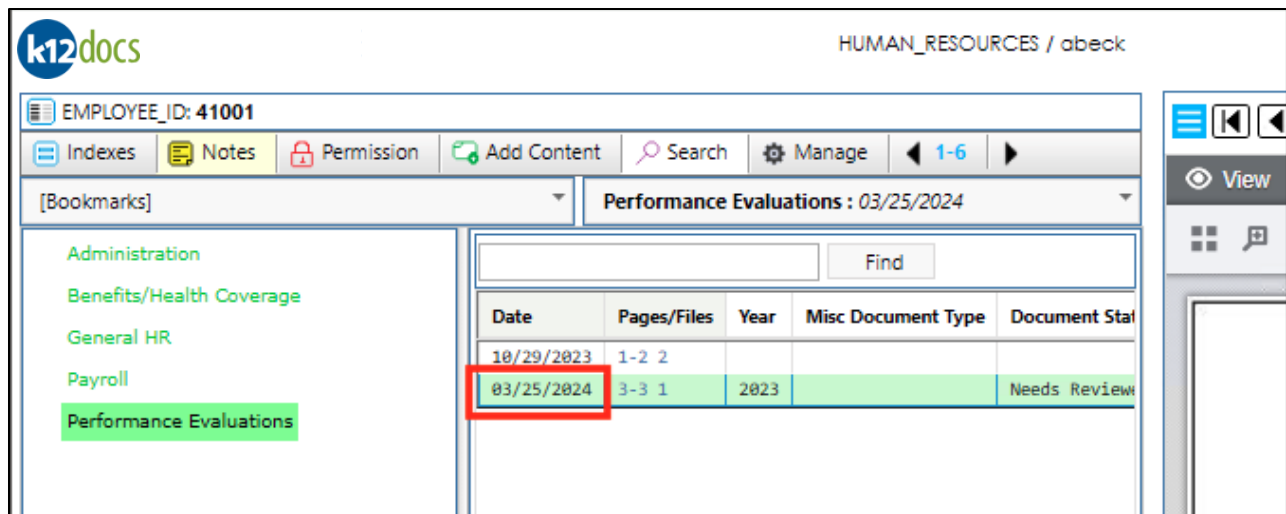
4. Enter your search value into the **Search Value:** field.
5. Click on the **OK** button.



6. The search results will be listed in the Search Results drop down.
7. Select the search result you want to view.



8. You will be taken to the page that contains the search results.

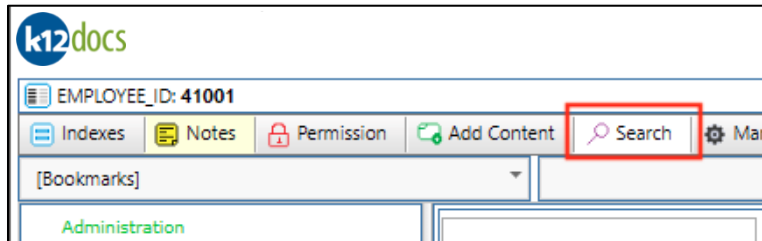


Searching Portfolio: Electronic File Title

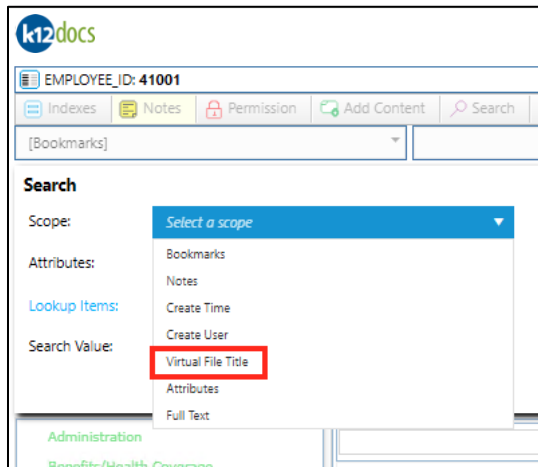
To search based on the title an electronic file in a folder, follow the steps listed below:

Steps:

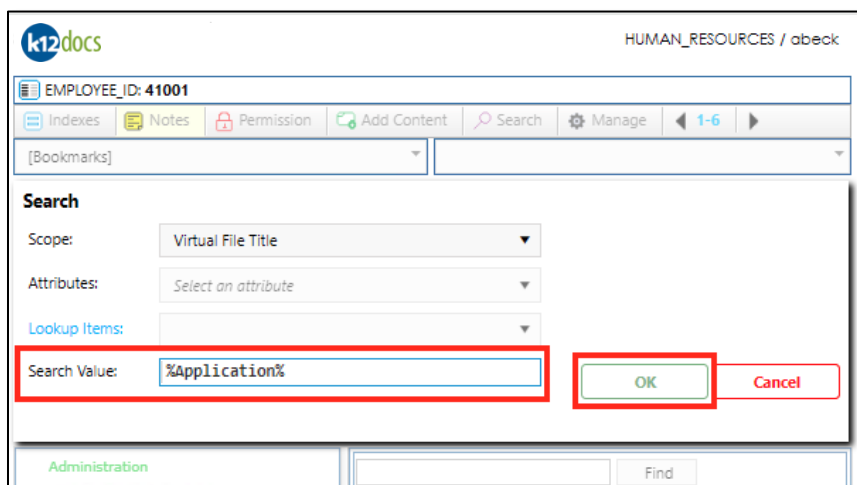
1. In the selected folder, click on the **Search** button.



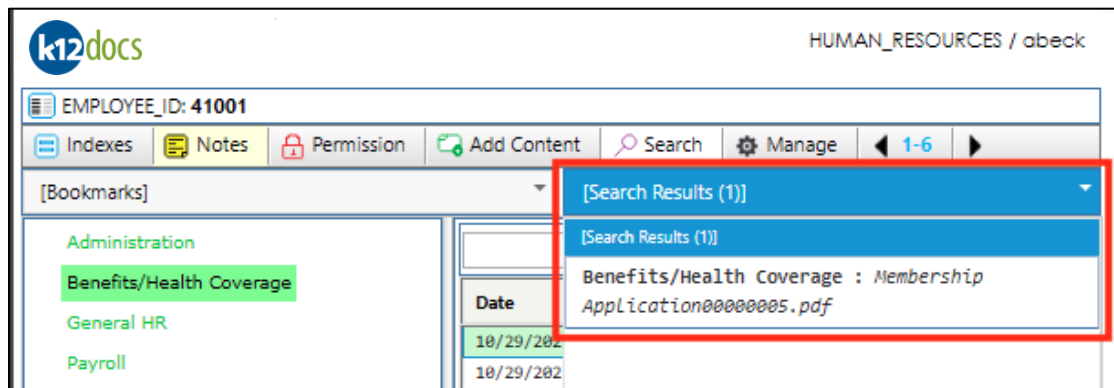
2. The **Search** window will expand.
3. Select **Virtual File Title** from the Scope drop down list.



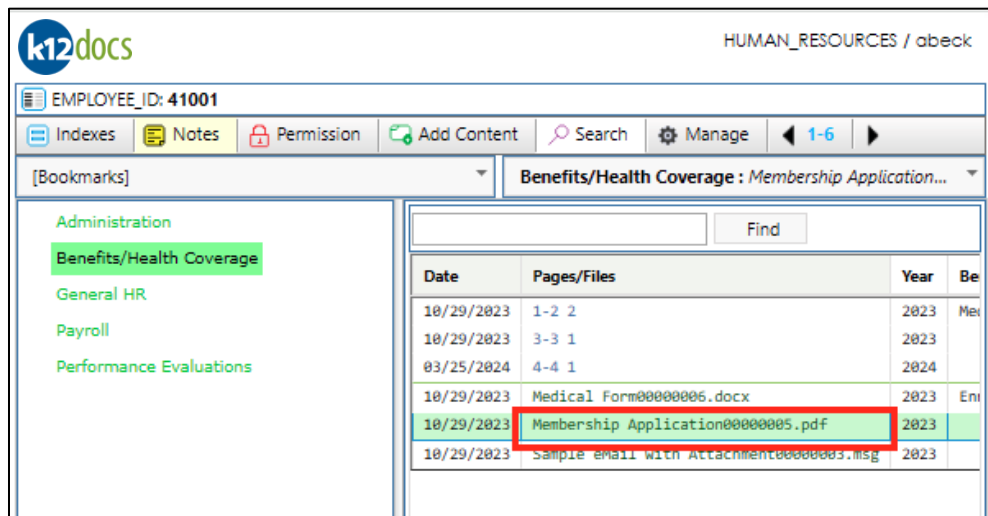
4. Enter your search value into the **Search Value:** field.
5. Click on the **OK** button.



6. The search results will be listed in the Search Results drop down.
7. Select the search result you want to view.



8. You will be taken to the page that contains the search results.

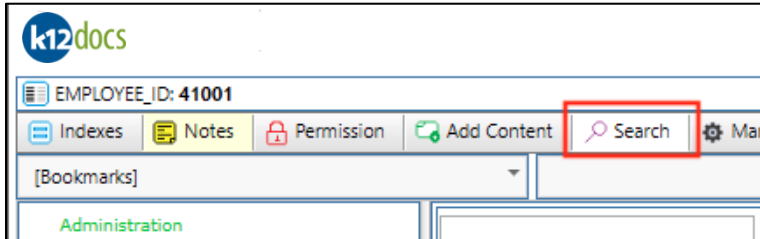


Searching Portfolio: Document Attributes

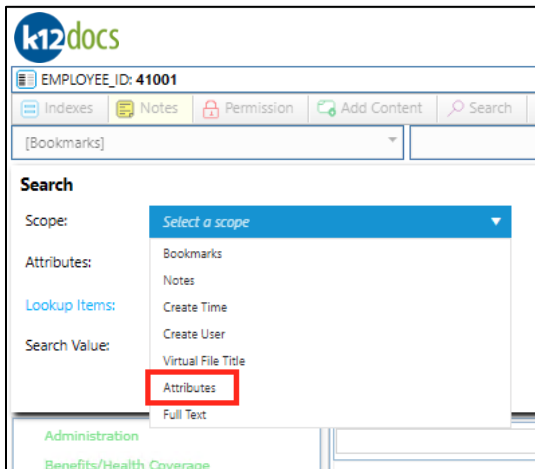
To search based on document attributes within a folder, follow the steps listed below:

Steps:

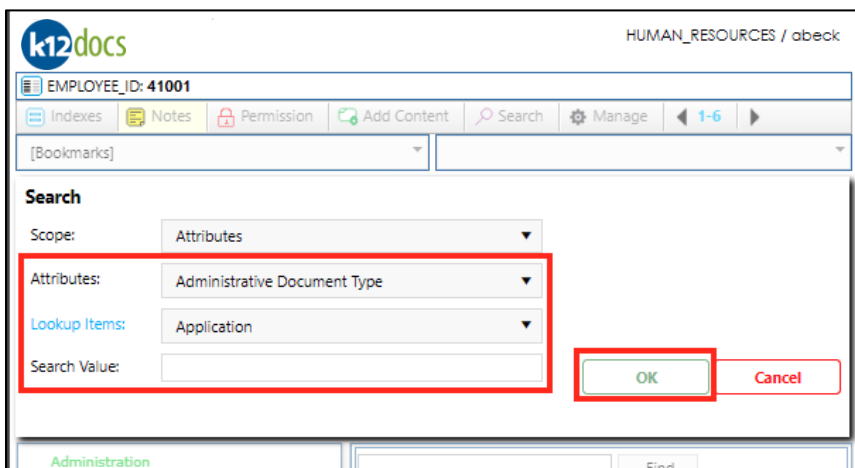
1. In the selected folder, click on the **Search** button.



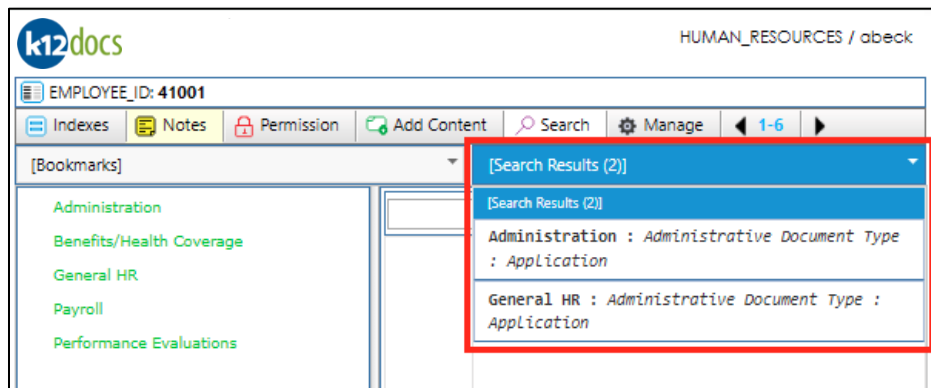
2. The **Search** window will expand.
3. Select **Attributes** from the Scope drop down list.



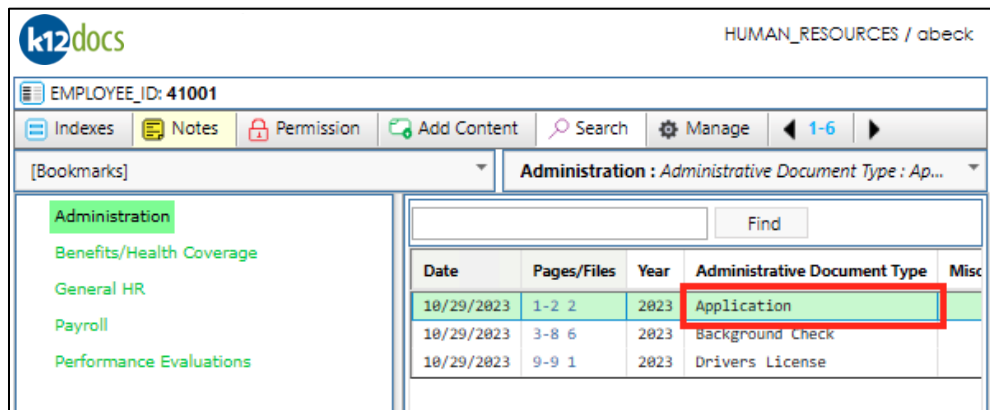
4. Select the attribute you want to search on.
5. If the attribute is a lookup value, select the value you want to look for from the **Lookup Items** list.
6. If the attribute is a text/date value, enter your search value into the **Search Value** field.
7. Click on the **OK** button.



8. The search results will be listed in the Search Results drop down.
9. Select the search result you want to view.



10. You will be taken to the page that contains the search results.

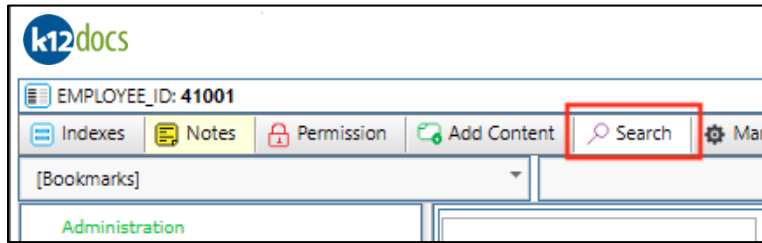


Searching Portfolio: Fulltext

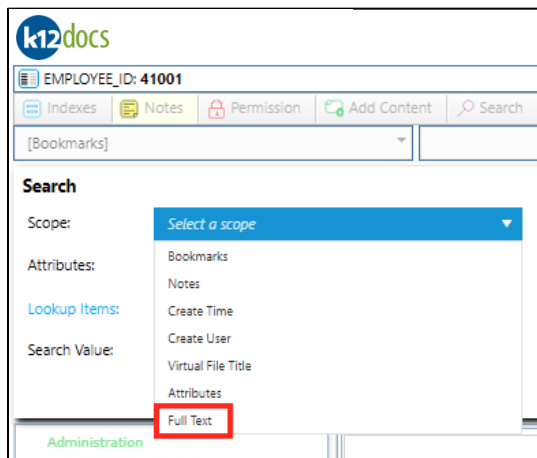
Full text searching allows you to run a search against documents that contain typed text. You can search for a specific word or phrase that may be contained within the typed text of the document(s). To perform a full text search within a folder, follow the steps listed below:

Steps:

1. In the selected folder, click on the **Search** button.



2. The **Search** window will expand.
3. Select **Full Text** from the Scope drop down list.



4. Enter your fulltext search criteria into the **Search Value:** field.

Note	<p>Search Criteria Examples:</p> <p>c) Specific Word or Value:</p> <ul style="list-style-type: none"> • If you were searching for a document that contained the word Mountain, you would enter Mountain into the Fulltext field. • If you were searching for a document containing the year 2018, you would enter 2018 into the Fulltext field. <p>d) Phrase:</p> <ul style="list-style-type: none"> • If you were searching for a document that contained the phrase Employer Review, you would enter "Employer Review" into the Fulltext field. • NOTE: When you search for a phrase, make sure to place double quotation marks (" ") before and after the specific phrase. If no double quotation marks are added, the search will not work.
------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

5. Click on the **OK** button.

EMPLOYEE_ID: GREEDAL

Indexes Notes Permission Add Content Search Manage 4-6

Search

Scope: Full Text

Attributes: Select an attribute

Lookup Items:

Search Value: Application

OK Cancel

6. The search results will be listed in the Search Results drop down.
7. Select the search result you want to view.

EMPLOYEE_ID: GREEDAL

Indexes Notes Permission Add Content Search Manage 4-6

Archive

Benefits/Deductions

Contracts

Employee Uploaded (Pending)

Human Resources

[Search Results (2)]

[Search Results (2)]

Human Resources : 2/16/2024 1:17:15 PM .txt

Human Resources : 2/16/2024 1:17:15 PM .txt

8. You will be taken to the page that contains the search results. The fulltext results will also include **FTX** listed in the Pages/Files area of the document and above the image viewer.

EMPLOYEE_ID: GREEDAL

Indexes Notes Permission Add Content Search Manage 4-6

Human Resources : 2/16/2024 1:17:15 PM .txt

Find

Date	Pages/Files	Document Descripti
02/16/2024	1-2 2 FTX	Kathy Jackson App
02/16/2024	JACKKA Teaching Certificate.pdf	Kathy Jackson Tea
02/16/2024	JACKKAT CPR Card.pdf	Kathy Jackson CPR

Archive

Benefits/Deductions

Contracts

Employee Uploaded (Pending)

Human Resources

Leave Requests

Medical/FMLA/Disability

Misc Documents for Testing

Payroll

View E-Sign

02/16/2024 Annotations Redactions Save Save E-Sign FTX

Application For Employment

We are an Equal Opportunity Employer and committed to excellence through diversity. Please print or type. This application must be fully completed to be considered. Please complete each section, even if you attach a resume.

Personal Information

Name

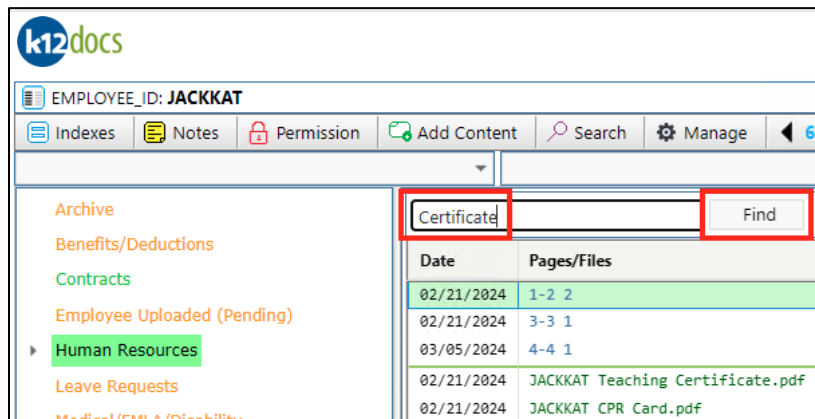
Kathy Marie Jackson

Searching Portfolio: Document Attribute Fields in Subfolder

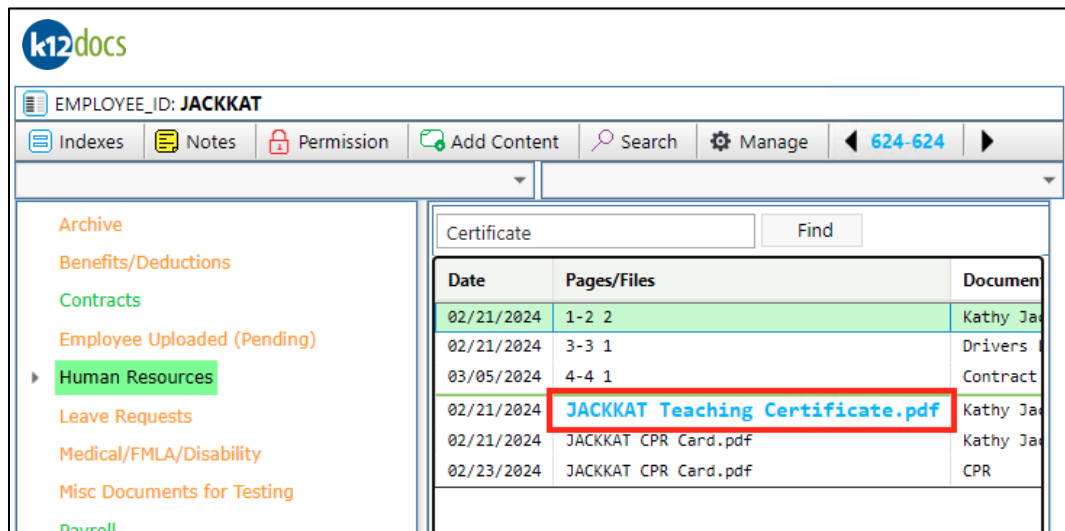
To search within the document attribute fields in a subfolder, follow the steps listed below:

Steps:

1. In the selected subfolder, enter your search value into the available field.
2. Click on the **Find** button.



3. Any value that matches your search term will be highlighted in blue in the document attribute area.

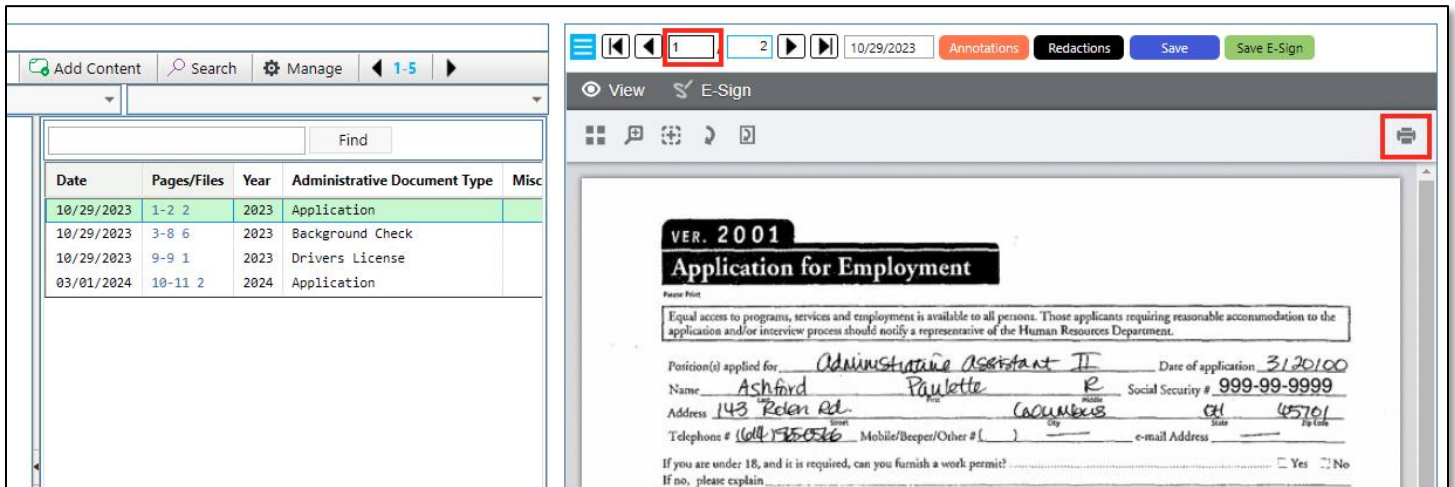


Publishing: Quick Print of Page in Image Viewer

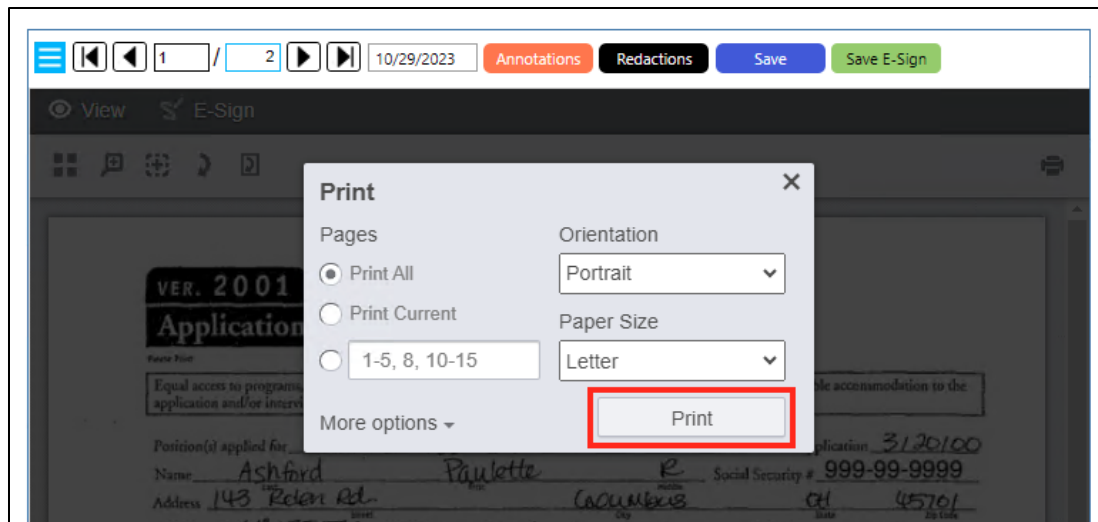
To print the single page displayed in the image viewer, follow the steps listed below:

Steps:

1. Within the Portfolio View tab, select the **Page** of the document you want to print.
2. Click on the **Print** icon, located in the image viewer.



3. A **Print** window will pop up.
4. Select the print options you would like to use.
5. Click on the **Print** button.



- Your default web browser's print window will pop up.
- Click on the **Print** button.

VER. 2001

Application for Employment

Equal access to programs, services and employment is available to all persons. Those applicants requiring reasonable accommodation to the application and/or interview process should notify a representative of the Human Resources Department.

Position(s) applied for: Administrative Assistant II Date of application: 3/20/00

Name: Ashford Paulette Social Security #: 999-99-9999

Address: 143 Eden Rd. Columbus OH 43201

Telephone #: (614) 350-0326 Mobile/Beep/Other #: e-mail Address:

If you are under 18, and it is required, can you furnish a work permit? ☐ Yes ☒ No

If no, please explain:

Have you ever been employed here before? If yes, give dates and positions: ☐ Yes ☒ No

Are you legally eligible for employment in this country? ☒ Yes ☐ No

Date available for work: 3/21/00 What is your desired salary range? \$28,000

Type of employment desired: ☒ Full-Time ☐ Part-Time ☐ Temporary ☐ Seasonal ☐ Educational Co-Op

Are you able to meet the attendance requirements of the position? ☐ Yes ☒ No

Have you ever pled "guilty" or "no contest" to, or been convicted of a crime? ☐ Yes ☒ No

If yes, please provide date(s) and details:

Accepting "yes" to these questions does not constitute an assurance of employment. Factors such as date of the offense, seriousness and nature of the violation, rehabilitation and position applied for will be taken into account.

Driver's license number if driving is an essential job function: State:

Employment History

Starting with your most recent employer, assignments or volunteer activities, provide the following information.

From (month/year)	To (month/year)	Employer	Address	City	State	Zip	Telephone	Position	Compensation	Hours	Remarks
2/98	5/00	Ohio State University	1620 Kenny Rd.	Columbus	OH	43202		Administrative Asst.	Hourly	21.00 per hr	26,000 per yr
12/90	2/98	Minerva Park Furniture Gallery	5000 Cleveland Ave.	Columbus	OH	43204		Receptionist	Hourly	8.00 per hr	9.25 per hr
5/95	12/90	Mortley Ramon Bright Insurance	3033 Columbus St.	Columbus	OH	43221		Receptionist	Hourly	4.20 per hr	6.00 per hr
1/93	5/95	Schwartz Dinner Training School	1104 Neilans Dr.	Jackson Twp	Jackson	OH	43202	Owner	Hourly	3.50 per hr	4.00 per hr

Print

1 sheet of paper

Destination: HP LaserJet 200 color M

Pages: All

Copies: 1

Color: Color

More settings

Print

Cancel

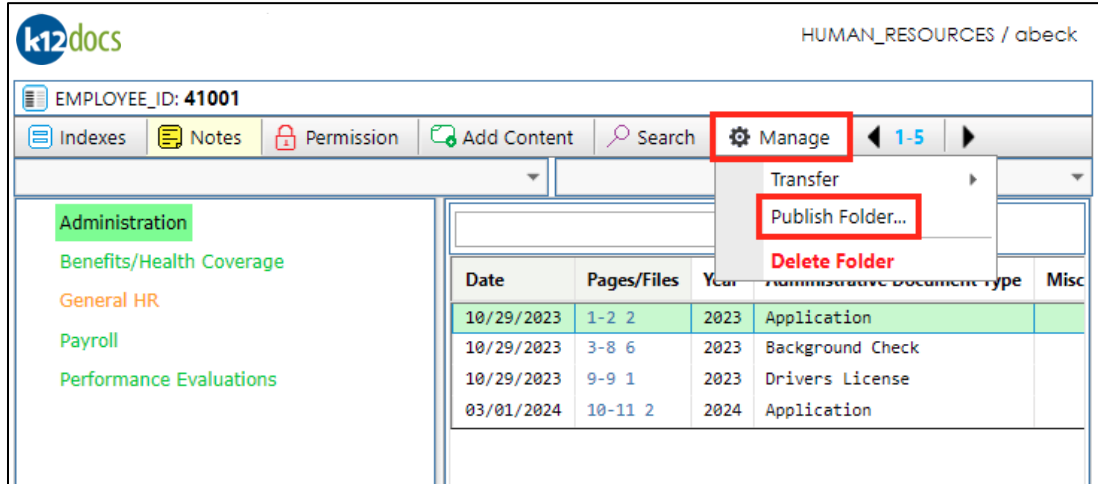
- Your selected page will now print.

Publishing: PDF a Folder

Publishing a Folder allows you to download or print the entire folder. Follow the steps below to publish a folder:

Steps:

1. In the Portfolio View tab of the selected folder, click on the **Manage** button.
2. Click on the **Publish Folder** button.




3. A **Publish PDF** window will expand.
4. Optional Settings to select:

NOTE: Multiple options can be selected at a time.		
Options	Folder Indexes	All folder indexes associated with the selected folder will be added to the published document.
	Folder Notes	All folder notes associated with the selected folder will be added to the published document.
	Document Attributes	All document attributes associated with the selected folder will be added to the published document.
	Page Bookmarks	All bookmarks associated with the selected folder will be added to the published document.
	Page Notes	All page notes associated with the selected folder will be added to the published document.
	Dynamic Annotations	All dynamic annotations associated with the selected folder will be added to the published document.
	Template Annotations	All template annotations associated with the selected folder will be added to the published document.
	Secured Pages Blank	Allows you to block certain pages from being published. When the published document is created, the pages that are blocked will be printed as blank pages and will say "This Page Intentionally Left Blank."
	Pagesets Descending Date	All pagesets associated with the selected folder will be placed in the published document in descending date order.
	Include Virtual Files	All virtual files associated with the selected folder will be placed in the published document.
Permission Access Levels	When an Alternate Permission Access Level (APAL) is entered into any and/or all of the available Access Level fields, the permissions associated with any pagesets, pages, and/or redactions within the selected folder that are higher than the APAL will be hidden/redacted in the published document.	

PDF Document	Title	Adds a title to the published document.
	Subject	Adds a subject to the published document.
	Author	Adds an author's name to the published document.
	Password	Add a password to the created PDF to secure it.
Output	View Now	This option will open the published document immediately in your default web browser.
	Download	This option will allow you to save the published document to a location of your choice. To give the published document a name, enter the name into the Save Name field.

- Click on the **Publish** button.


HUMAN_RESOURCES / abeck

EMPLOYEE_ID: 41001

Indexes

Notes

Permission

Add Content

Search

Manage

1-5

×

Publish PDF

Scope

Folder

Page Range: ☐

Options

☐ Folder Indexes
☐ Folder Notes
☐ Document Attributes
☐ Page Bookmarks
☐ Page Notes
☐ Dynamic Annotations
☐ Template Annotations
☐ Secured Pages Blank
☐ Pagesets Descending Date
☐ Include Virtual Files

Publish

Permission Access Levels

Pagesets

0

Pages

0

Redactions

0

PDF Document

Title

Subject

Author



Password

Output

☒ View Now
☐ Download

6. A PDF of the select folder will be created and will display in your default web browser.
7. To **Download** the PDF:
 - a. Select the **Download** button and save the PDF to your preferred location on your computer.
8. To **Print** the PDF:
 - a. Select the **Print** button and send the PDF to be printed at your desired printer.
9. When done with the published folder, click on the **X** button.

IntelliCloud Published Document
1 / 19
80%
⏏
🔄



⋮

VER. 2001

Application for Employment

Please Print

Equal access to programs, services and employment is available to all persons. Those applicants requiring reasonable accommodation to the application and/or interview process should notify a representative of the Human Resources Department.

Position(s) applied for Administrative Assistant II Date of application 3/20/00

Name Ashford Paulette R Social Security # 999-99-9999

Address 143 Kelen Rd. Columbus GA 45701

Telephone # (604) 955-0536 Mobile/Beeper/Other # () e-mail Address _____

If you are under 18, and it is required, can you furnish a work permit? ☐ Yes ☒ No

If no, please explain _____

Have you ever been employed here before? If yes, give dates and positions ☐ Yes ☒ No

Are you legally eligible for employment in this country? ☒ Yes ☐ No

Date available for work 3/21/00 What is your desired salary range? \$28,000

Type of employment desired ☒ Full-Time ☐ Part-Time ☐ Temporary ☐ Seasonal ☐ Educational Co-Op

Are you able to meet the attendance requirements of the position? ☐ Yes ☒ No

Have you ever pled "guilty" or "no contest" to, or been convicted of a crime? ☐ Yes ☒ No

If yes, please provide date(s) and details _____

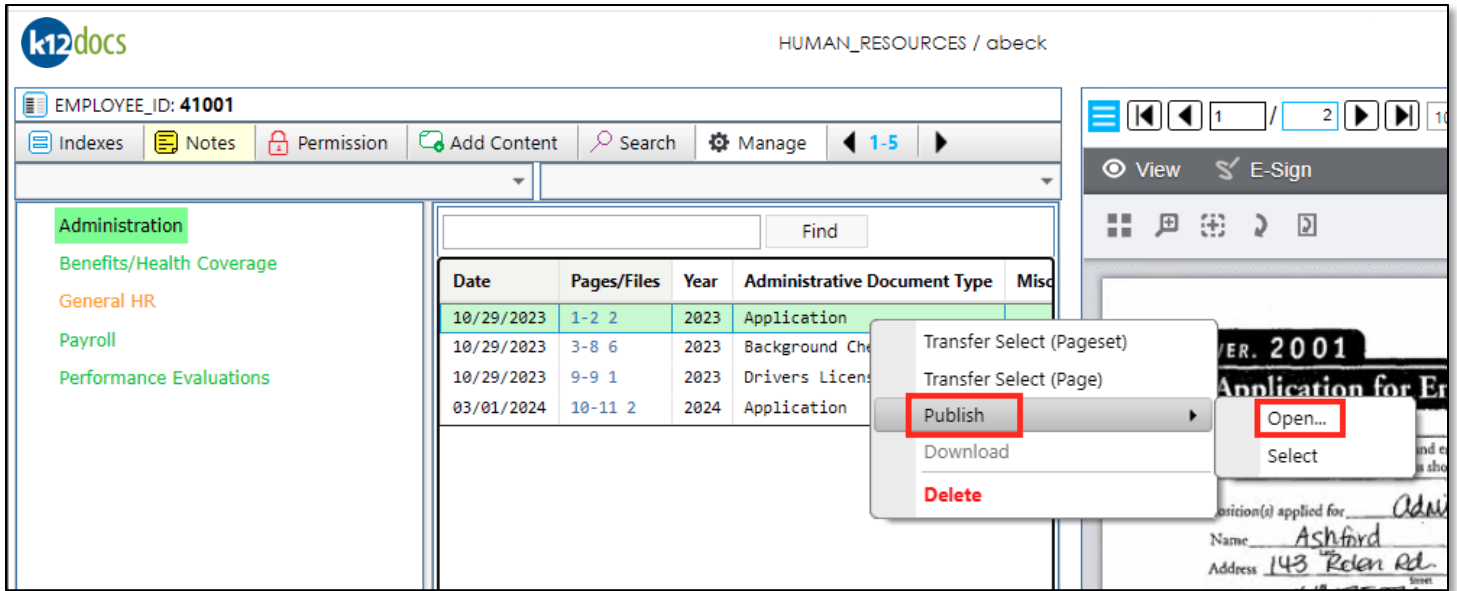
Answering "yes" to these questions does not constitute an automatic bar to employment. Factors such as date of the offense, seriousness and nature of the violation, rehabilitation and period of time will be taken into account.

Publishing: PDF a Document

Publishing a Document allows you to download or print a selected document. Follow the steps below to publish a selected document:

Steps:

1. Select the document you want to publish.
2. Right-click on the selected document.
3. Select the **Publish** button.
4. Select the **Open...** button.



5. A **Publishing** window will expand.

Note

a) If you want to publish a page range, check the **Page Range** box and enter the range of pages into the provided field.

Example:

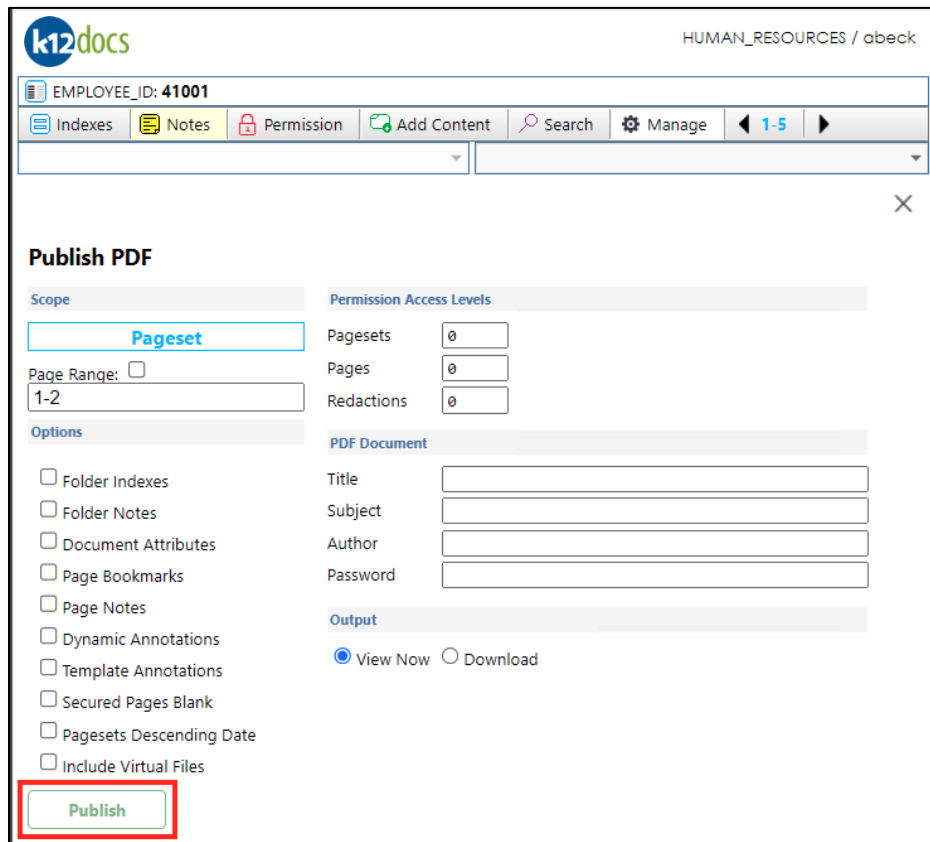
Page Range(s)
 3-5

6. Optional Settings to select:

NOTE: Multiple options can be selected at a time.		
Options	Folder Indexes	All folder indexes associated with the selected document will be added to the published document.
	Folder Notes	All folder notes associated with the selected document will be added to the published document.
	Document Attributes	All document attributes associated with the selected document will be added to the published document.
	Page Bookmarks	All bookmarks associated with the selected document will be added to the published document.
	Page Notes	All page notes associated with the selected document will be added to the published document.
	Dynamic Annotations	All dynamic annotations associated with the selected document will be added to the published document.

	Template Annotations	All template annotations associated with the selected document will be added to the published document.
	Secured Pages Blank	Allows you to block certain pages from being published. When the published document is created, the pages that are blocked will be printed as blank pages and will say "This Page Intentionally Left Blank."
	Pagesets Descending Date	All pagesets associated with the selected document will be placed in the published document in descending date order.
	Include Virtual Files	All virtual files associated with the selected document will be placed in the published document.
Permission Access Levels	When an Alternate Permission Access Level (APAL) is entered into any and/or all of the available Access Level fields, the permissions associated with any pagesets, pages, and/or redactions within the selected document that are higher than the APAL will be hidden/redacted in the published document.	
PDF Document	Title	Adds a title to the published document.
	Subject	Adds a subject to the published document.
	Author	Adds an author's name to the published document.
	Password	Add a password to the created PDF to secure it.
Output	View Now	This option will open the published document immediately in your default web browser.
	Download	This option will allow you to save the published document to a location of your choice. To give the published document a name, enter the name into the Save Name field.

- Click on the **Publish** button.



k12docs HUMAN_RESOURCES / abeck

EMPLOYEE_ID: 41001

Indexes Notes Permission Add Content Search Manage 1-5

Publish PDF

Scope

Pageset

Page Range: ☐ 1-2

Options

☐ Folder Indexes

☐ Folder Notes

☐ Document Attributes

☐ Page Bookmarks

☐ Page Notes

☐ Dynamic Annotations

☐ Template Annotations

☐ Secured Pages Blank

☐ Pagesets Descending Date

☐ Include Virtual Files

Permission Access Levels

Pagesets

Pages

Redactions

PDF Document

Title

Subject

Author

Password

Output

☒ View Now ☐ Download

Publish

8. A PDF of the selected document will be created and will display in your default web browser.
9. To **Download** the PDF:
 - a. Select the **Download** button and save the PDF to your preferred location on your computer.
10. To **Print** the PDF:
 - a. Select the **Print** button and send the PDF to be printed at your desired printer.
11. When done with the published document, click on the **X** button.

IntelliCloud Published Document
1 / 2 | 100% +

↓
🖨️
⋮

VER. 2001

Application for Employment

Please Print

Equal access to programs, services and employment is available to all persons. Those applicants requiring reasonable accommodation to the application and/or interview process should notify a representative of the Human Resources Department.

Position(s) applied for Administrative Assistant II Date of application 3/20/00

Name Ashford Paulette R Social Security # 999-99-9999

Address 143 Eden Rd. Columbus GA 45701

Telephone # (604) 555-0566 Mobile/Beeper/Other # () e-mail Address

If you are under 18, and it is required, can you furnish a work permit? ☐ Yes ☒ No

If no, please explain

Have you ever been employed here before? If yes, give dates and positions ☐ Yes ☒ No

Are you legally eligible for employment in this country? ☒ Yes ☐ No

Date available for work 3/21/00 What is your desired salary range? \$ 22,000

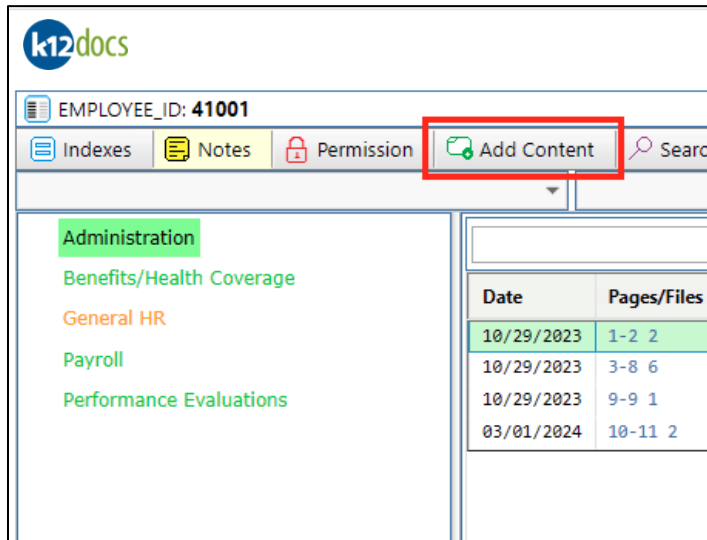
Type of employment desired ☒ Full Time ☐ Part Time ☐ Temporary ☐ Seasonal ☐ Educational C.O.

Importing: Add an Electronic Document to a Folder

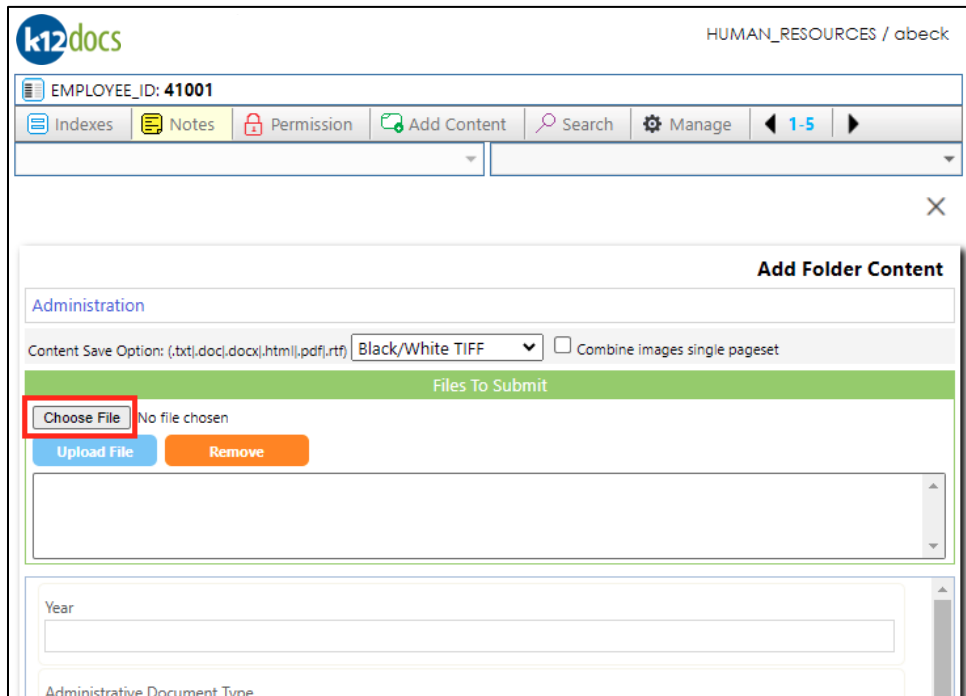
Importing allows you to add electronic documents to a folder. To import electronic documents, follow the steps listed below:

Steps:

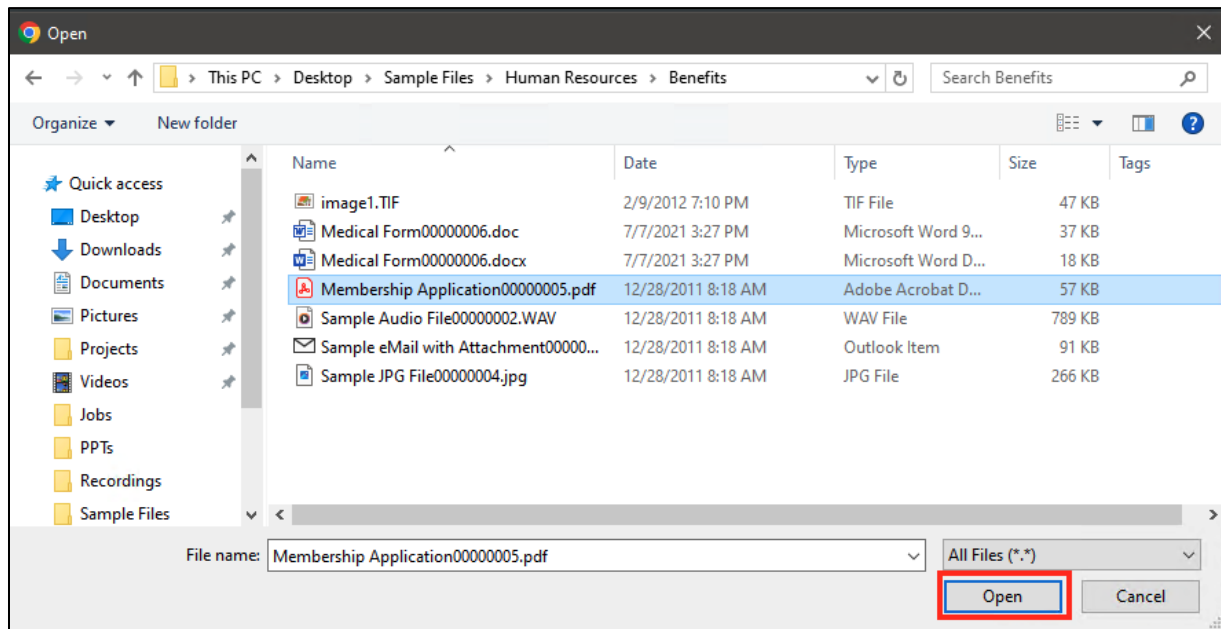
1. Within the Portfolio View tab, select the Subfolder you want to import electronic files to.
2. Click on the **Add Content** button.



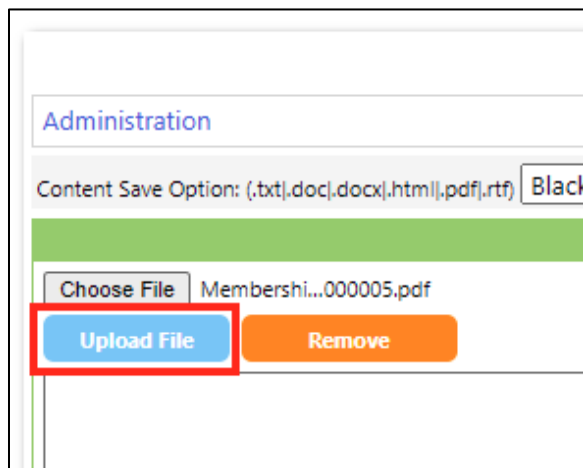
3. An **Add Folder Content** window will expand.
4. Click on the **Choose File** button.



5. An **Open** window will pop up.
6. Locate the electronic document you want to import.
7. Click on the **Open** button.



8. Click on the **Upload File** button.



9. The electronic document is now attached.

Note

- a) To add multiple documents, repeat steps 4 through 9.
- b) If you would like the multiple documents to be merged together on import, check the **Combine in images single pageset** box.
- c) If you want to remove any of the multiple documents attached, select the document, and click on the **Remove** button.
- d) If you want to convert the electronic document to black and white Tiff, select the **Content Save Option** of: **Black/White TIFF**. The electronic formats that can be converted are: .txt, .doc, .docx, .html, .pdf, .rtf

10. If document attributes are available, enter the desired information into the provided fields.

11. Click on the **Submit** button.

✕

Add Folder Content

Administration

Content Save Option: (.txt|.doc|.docx|.html|.pdf|.rtf) Black/White TIFF ☐ Combine images single pageset

Files To Submit

Choose File No file chosen

Upload File
Remove

Membership Application00000005.pdf

Year

2024

Administrative Document Type

Misc Document Type

Document Status

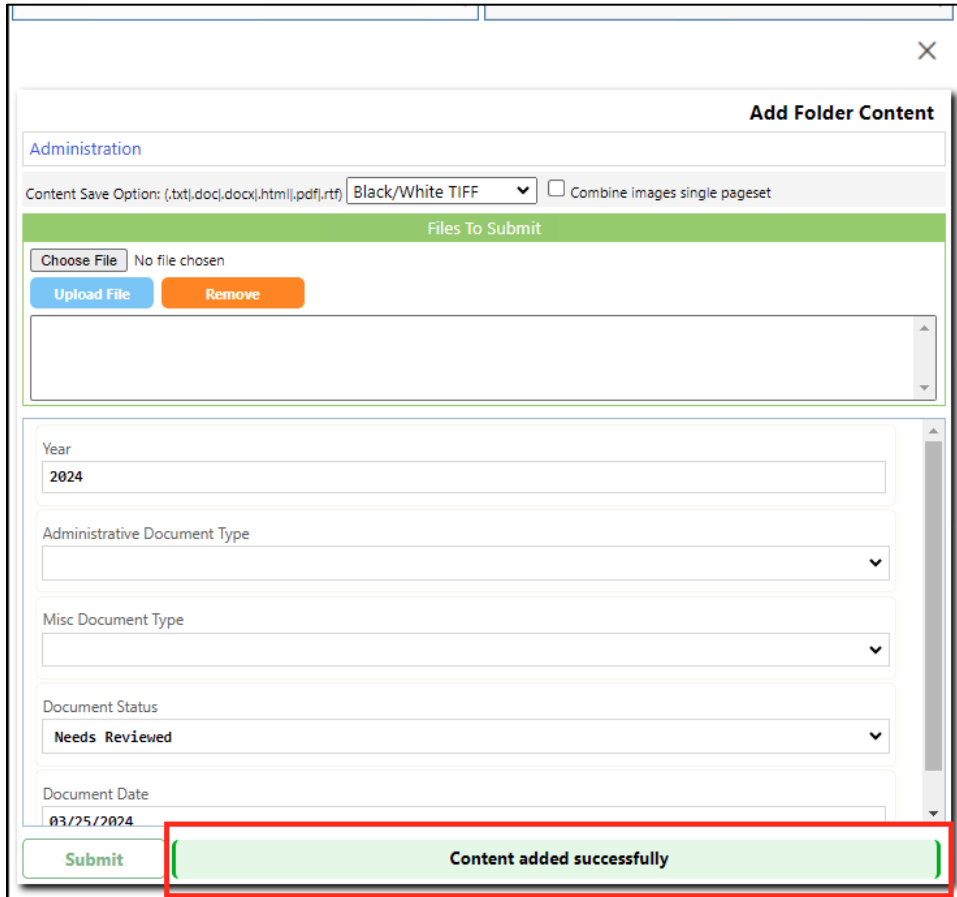
Needs Reviewed

Document Date

03/25/2024

Submit

12. A message will appear, confirming the file has been added.
13. To close the **Add Folder Content** window, click on the X.



The screenshot shows the 'Add Folder Content' window with the following elements:

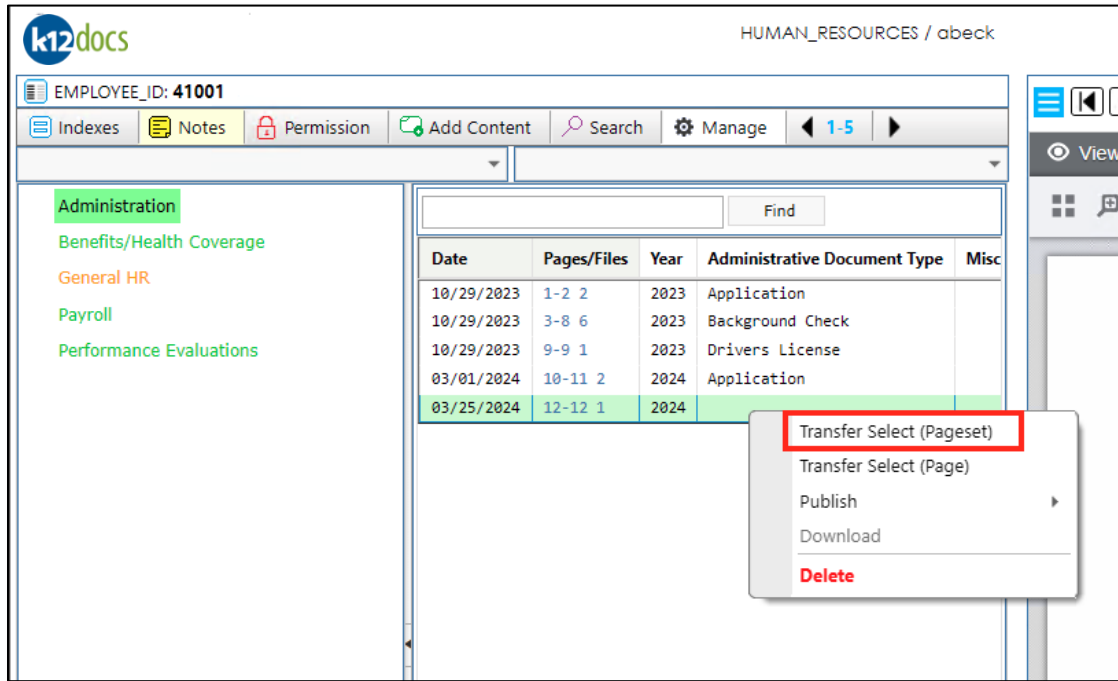
- Administration** tab selected.
- Content Save Option:** A dropdown menu set to 'Black/White TIFF' and an unchecked checkbox for 'Combine images single pageset'.
- Files To Submit** section: Includes a 'Choose File' button (disabled), 'No file chosen' text, an 'Upload File' button, and a 'Remove' button.
- Form Fields:**
 - Year:** Text input field containing '2024'.
 - Administrative Document Type:** Dropdown menu.
 - Misc Document Type:** Dropdown menu.
 - Document Status:** Dropdown menu set to 'Needs Reviewed'.
 - Document Date:** Text input field containing '03/25/2024'.
- Submit** button at the bottom left.
- Success Message:** A green banner at the bottom right states 'Content added successfully'.

Transfer in Same Folder: Move a Document to Another Subfolder

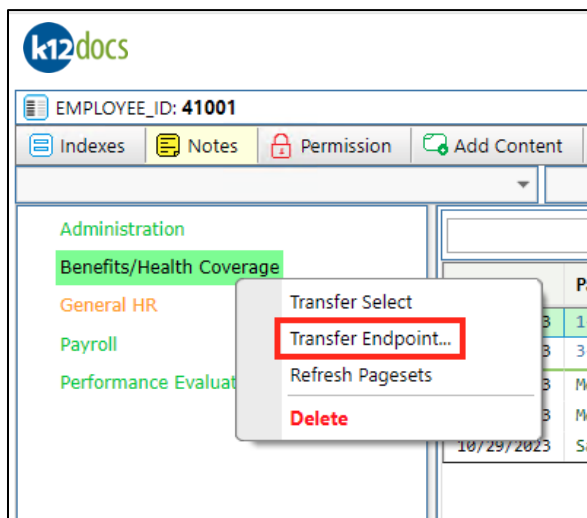
To transfer a document from one subfolder to another, within the same folder, follow the steps listed below:

Steps:

1. Select the document that is located in the wrong subfolder.
2. Right-click on the selected document.
3. Select the **Transfer Select (Pageset)** button.



4. Select the subfolder you want to transfer the document to.
5. Right-click on the subfolder.
6. Select the **Transfer Endpoint...** button.

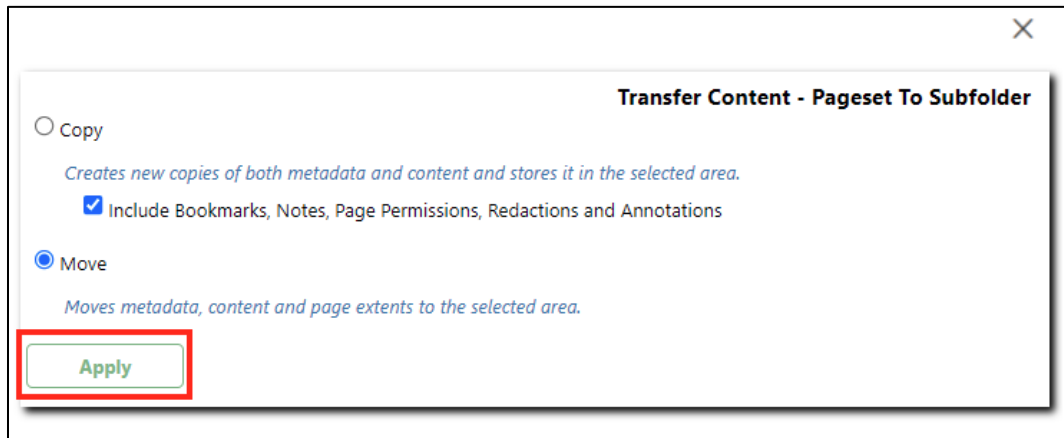


7. A **Transfer Content – Pageset To Subfolder** window will expand.
8. The **Move** box is automatically checked.

Note

- a) The **Include Bookmarks, Notes, Page Permissions, Redactions, and Annotations** box is automatically checked as well.
- b) If wanting to place just a copy of the selected document into a selected subfolder, select the **Copy** option.

9. Click on the **Apply** button.



Transfer Content - Pageset To Subfolder

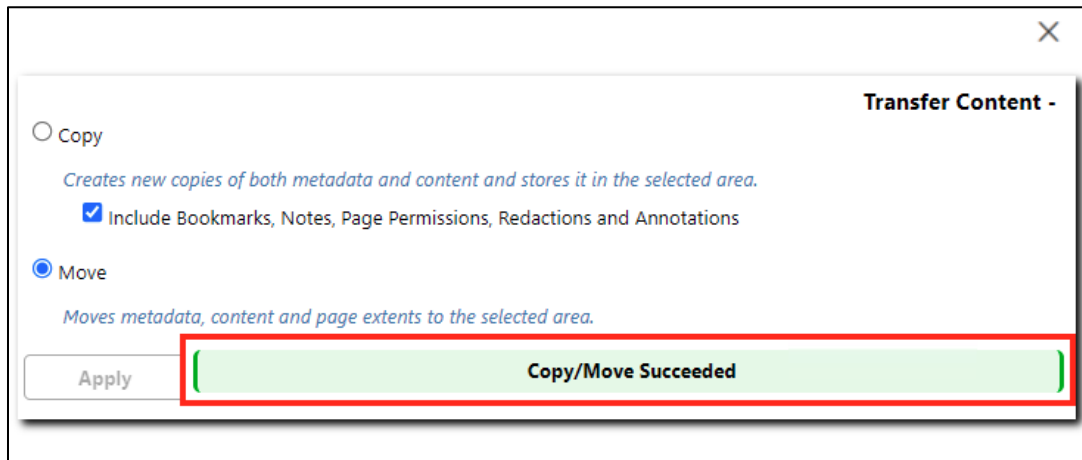
☐ Copy
Creates new copies of both metadata and content and stores it in the selected area.

☒ Include Bookmarks, Notes, Page Permissions, Redactions and Annotations

☒ Move
Moves metadata, content and page extents to the selected area.

Apply

10. A message will appear, confirming the document has been transferred.
11. To close the **Transfer Content** window, click on the X.



Transfer Content -

☐ Copy
Creates new copies of both metadata and content and stores it in the selected area.

☒ Include Bookmarks, Notes, Page Permissions, Redactions and Annotations

☒ Move
Moves metadata, content and page extents to the selected area.

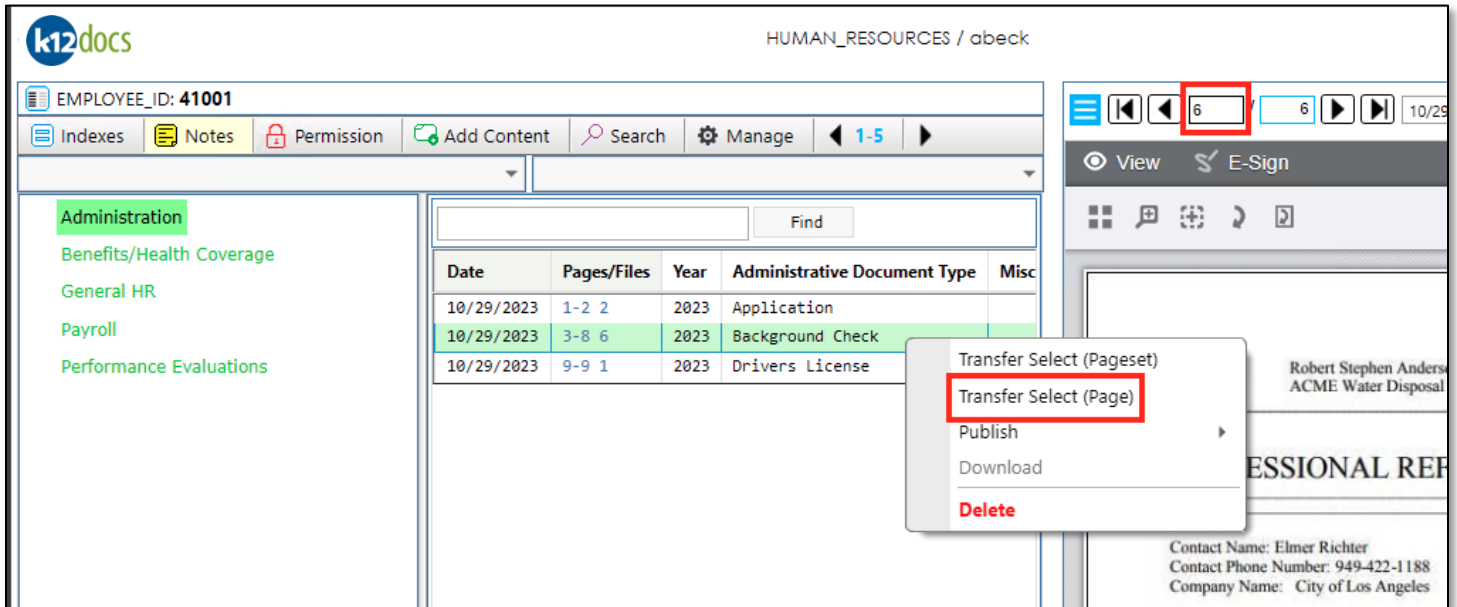
Copy/Move Succeeded

Transfer in Same Folder: Move a Page to Another Subfolder

To transfer a page from one subfolder to another, within the same folder, follow the steps listed below:

Steps:

1. Select the page that is located in the wrong subfolder and document.
2. Right-click on the selected document.
3. Select the **Transfer Select (Page)** button.



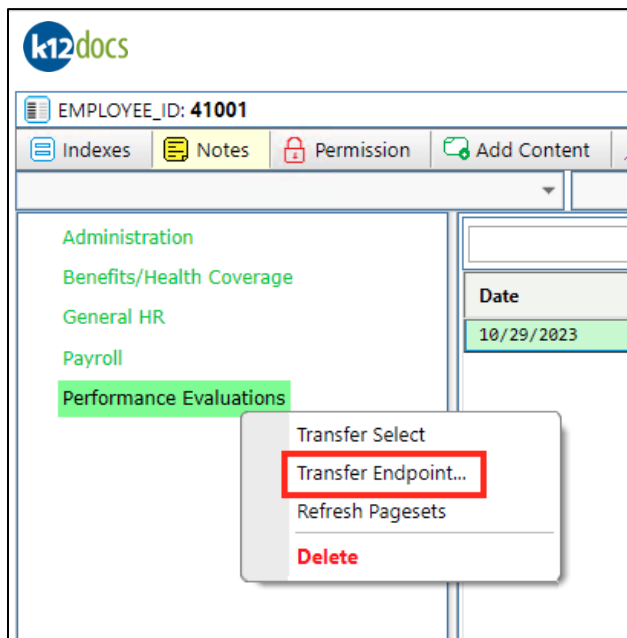
The screenshot shows the k12docs interface for a document titled 'EMPLOYEE_ID: 41001'. The left sidebar lists subfolders: Administration, Benefits/Health Coverage, General HR, Payroll, and Performance Evaluations. The main area displays a table of documents. A right-click context menu is open over the 'Background Check' document, with the 'Transfer Select (Page)' option highlighted by a red box.

Date	Pages/Files	Year	Administrative Document Type	Misc
10/29/2023	1-2 2	2023	Application	
10/29/2023	3-8 6	2023	Background Check	
10/29/2023	9-9 1	2023	Drivers License	

Context Menu Options:

- Transfer Select (Pageset)
- Transfer Select (Page)**
- Publish
- Download
- Delete

4. Select the subfolder you want to transfer the page to.
5. Right-click on the subfolder.
6. Select the **Transfer Endpoint...** button.



The screenshot shows the k12docs interface for the same document. The left sidebar is visible, and the 'Performance Evaluations' subfolder is highlighted. A right-click context menu is open over this subfolder, with the 'Transfer Endpoint...' option highlighted by a red box.

Context Menu Options:

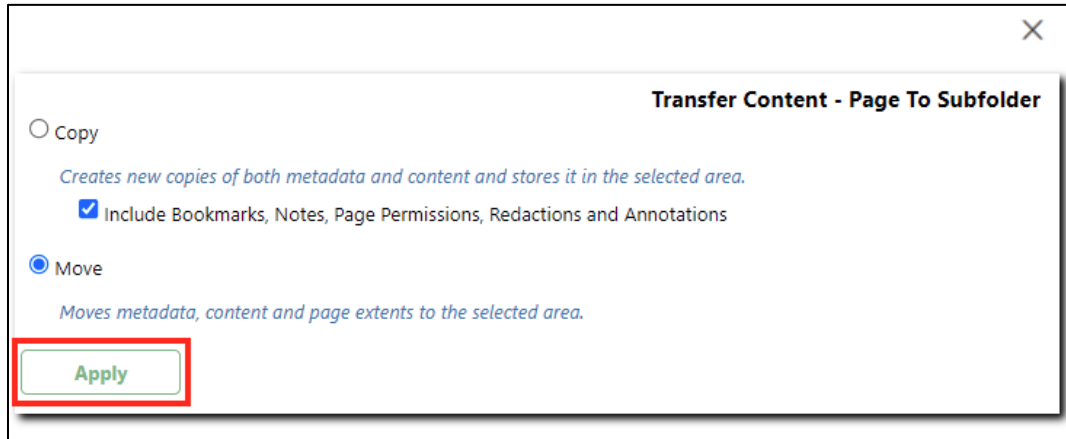
- Transfer Select
- Transfer Endpoint...**
- Refresh Pagesets
- Delete

7. A **Transfer Content – Page To Subfolder** window will expand.
8. The **Move** box is automatically checked.

Note

- a) The **Include Bookmarks, Notes, Page Permissions, Redactions, and Annotations** box is automatically checked as well.
- b) If wanting to place just a copy of the selected page into a selected subfolder, select the **Copy** option.

9. Click on the **Apply** button.



Transfer Content - Page To Subfolder

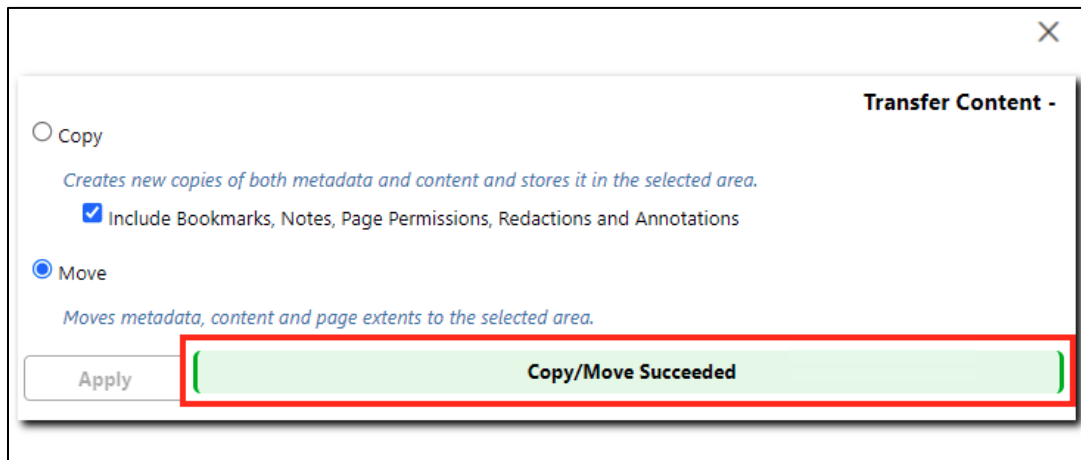
☐ Copy
Creates new copies of both metadata and content and stores it in the selected area.

☒ Include Bookmarks, Notes, Page Permissions, Redactions and Annotations

☒ Move
Moves metadata, content and page extents to the selected area.

Apply

10. A message will appear, confirming the page has been transferred.
11. To close the **Transfer Content** window, click on the X.



Transfer Content -

☐ Copy
Creates new copies of both metadata and content and stores it in the selected area.

☒ Include Bookmarks, Notes, Page Permissions, Redactions and Annotations

☒ Move
Moves metadata, content and page extents to the selected area.

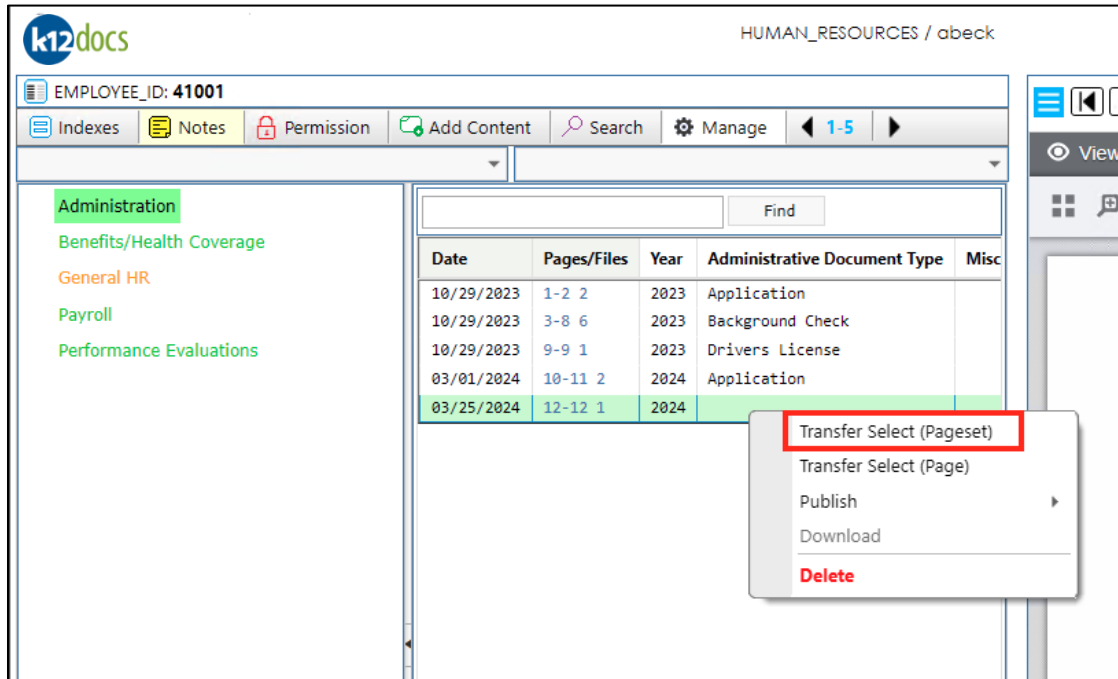
Copy/Move Succeeded

Transfer to Another Folder: Move a Document

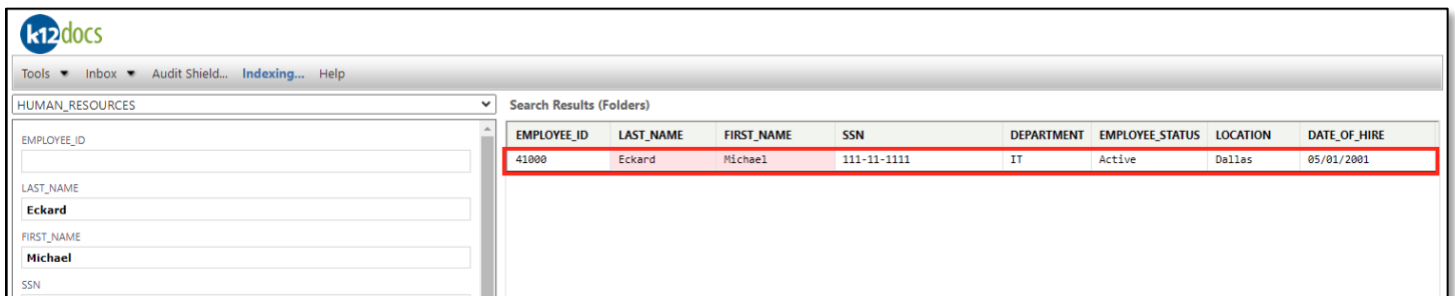
To transfer a document from one folder to another folder, follow the steps listed below:

Steps:

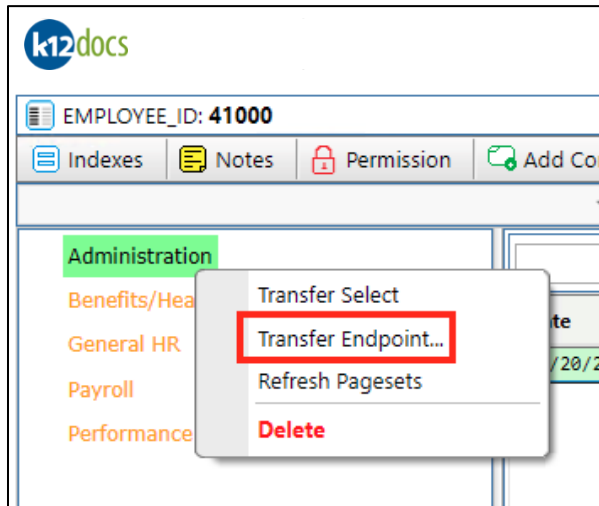
1. Select the document that is located in the wrong folder.
2. Right-click on the selected document.
3. Select the **Transfer Select (Pageset)** button.



4. Go to the **Search** tab.
5. Run a search for the folder you want to move the selected document to and open it.



6. Select the subfolder you want to transfer the document to.
7. Right-click on the subfolder.
8. Select the **Transfer Endpoint...** button.

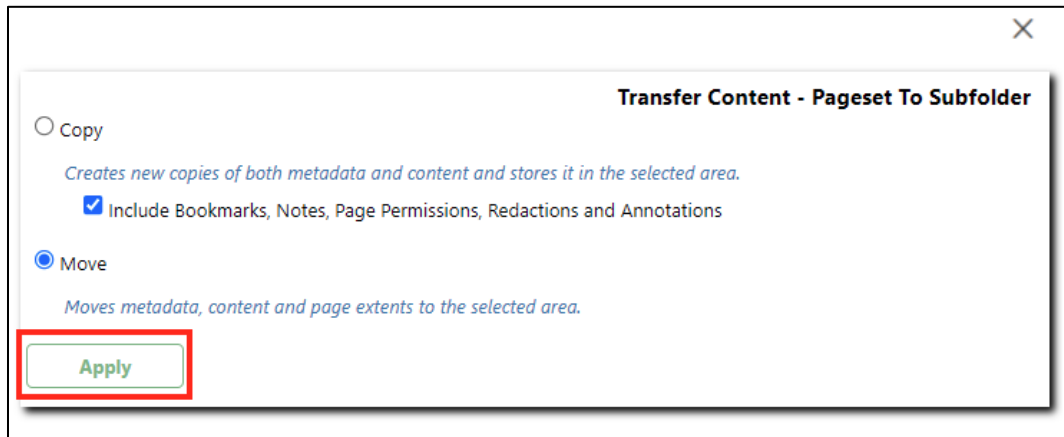


9. A **Transfer Content – Pageset To Subfolder** window will expand.
10. The **Move** box is automatically checked.

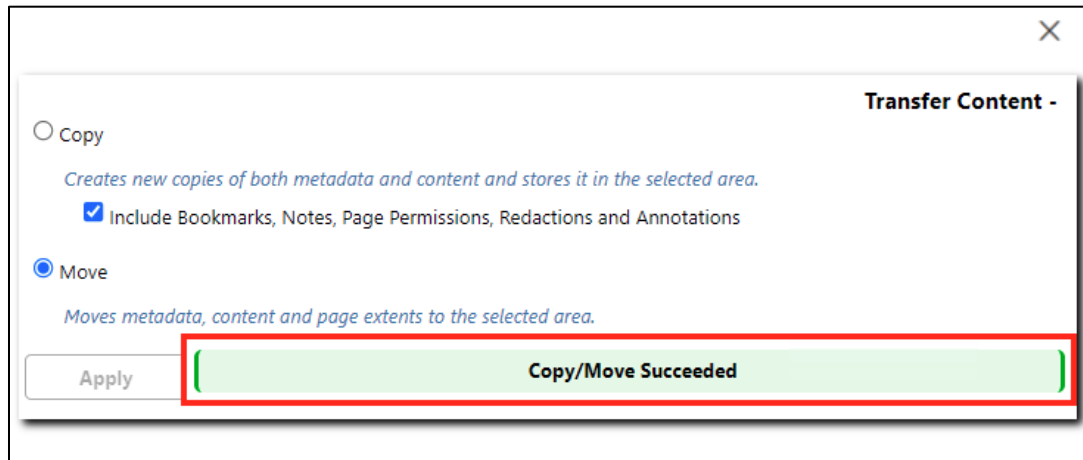
Note

- a) The **Include Bookmarks, Notes, Page Permissions, Redactions, and Annotations** box is automatically checked as well.
- b) If wanting to place just a copy of the selected document into a selected subfolder, select the **Copy** option.

11. Click on the **Apply** button.



12. A message will appear, confirming the document has been transferred.
13. To close the **Transfer Content** window, click on the X.

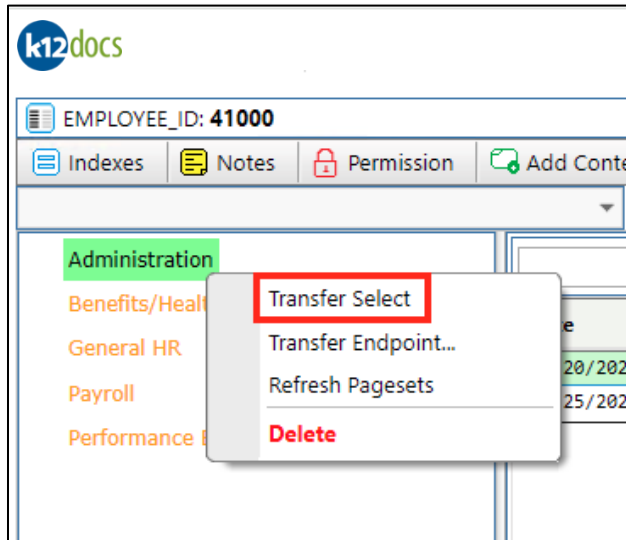


Transfer to Another Folder: Move an Entire Subfolder of Documents

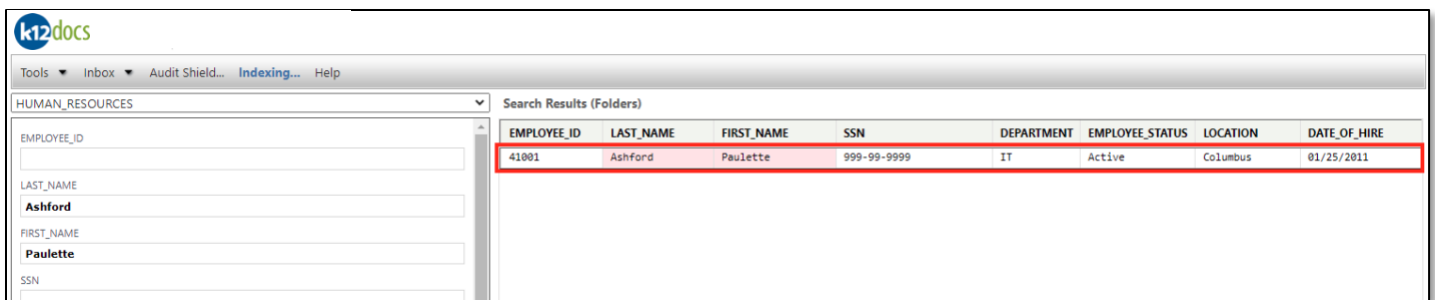
To transfer the documents of an entire subfolder to another folder, follow the steps listed below:

Steps:

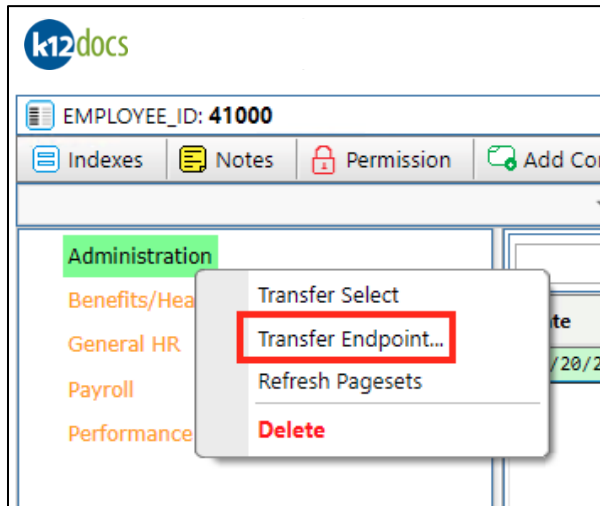
1. Select the subfolder that contains the documents you want to move.
2. Right-click on the selected subfolder.
3. Select the **Transfer Select** button.



4. Go to the **Search** tab.
5. Run a search for the folder you want to move the selected document to and open it.



6. Select the subfolder you want to transfer the documents to.
7. Right-click on the subfolder.
8. Select the **Transfer Endpoint...** button.

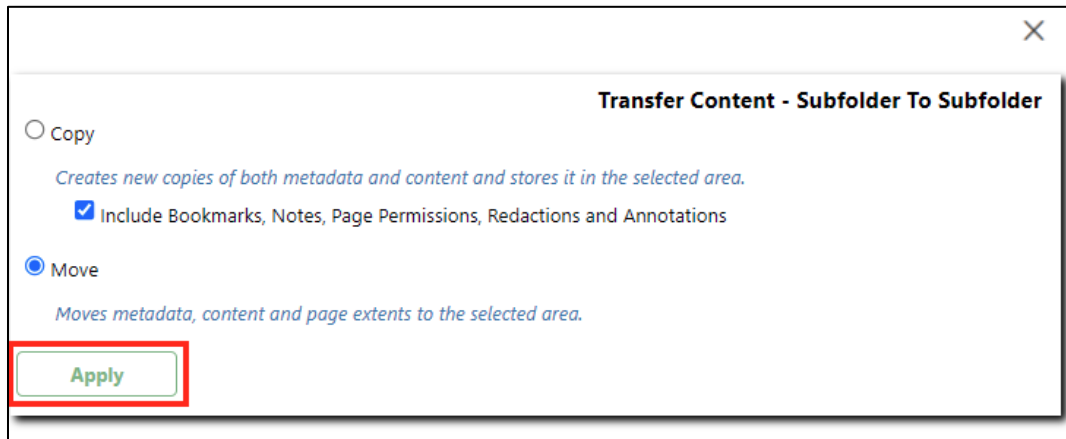


9. A **Transfer Content – Subfolder To Subfolder** window will expand.
10. The **Move** box is automatically checked.

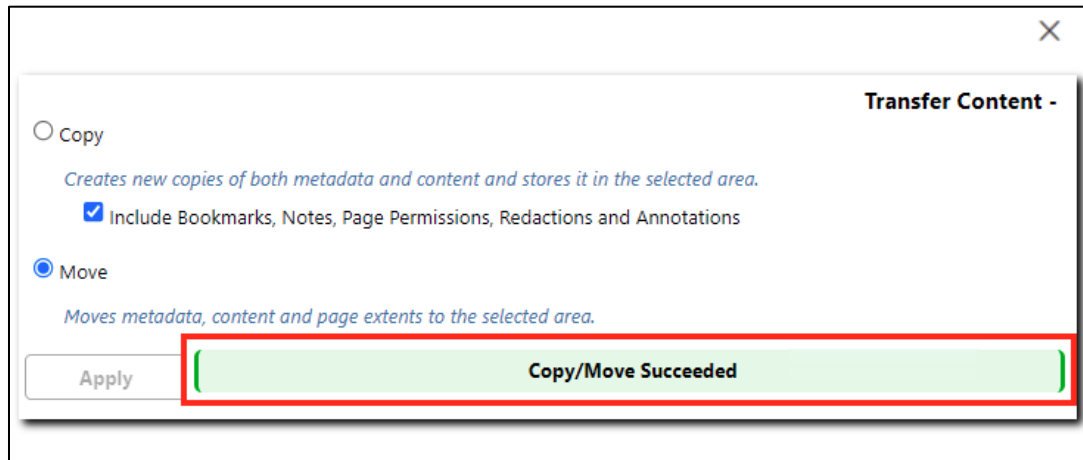
Note

- a) The **Include Bookmarks, Notes, Page Permissions, Redactions, and Annotations** box is automatically checked as well.
- b) If wanting to place just a copy of the selected documents into a selected subfolder, select the **Copy** option.

11. Click on the **Apply** button.



12. A message will appear, confirming the documents have been transferred.
13. To close the **Transfer Content** window, click on the X.

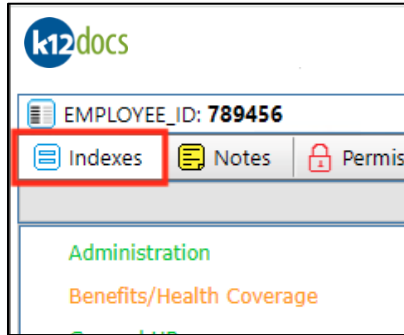


Modify: Folder Indexes

If you find need to update the information entered in the Folder Index fields for a folder, follow the steps listed below:

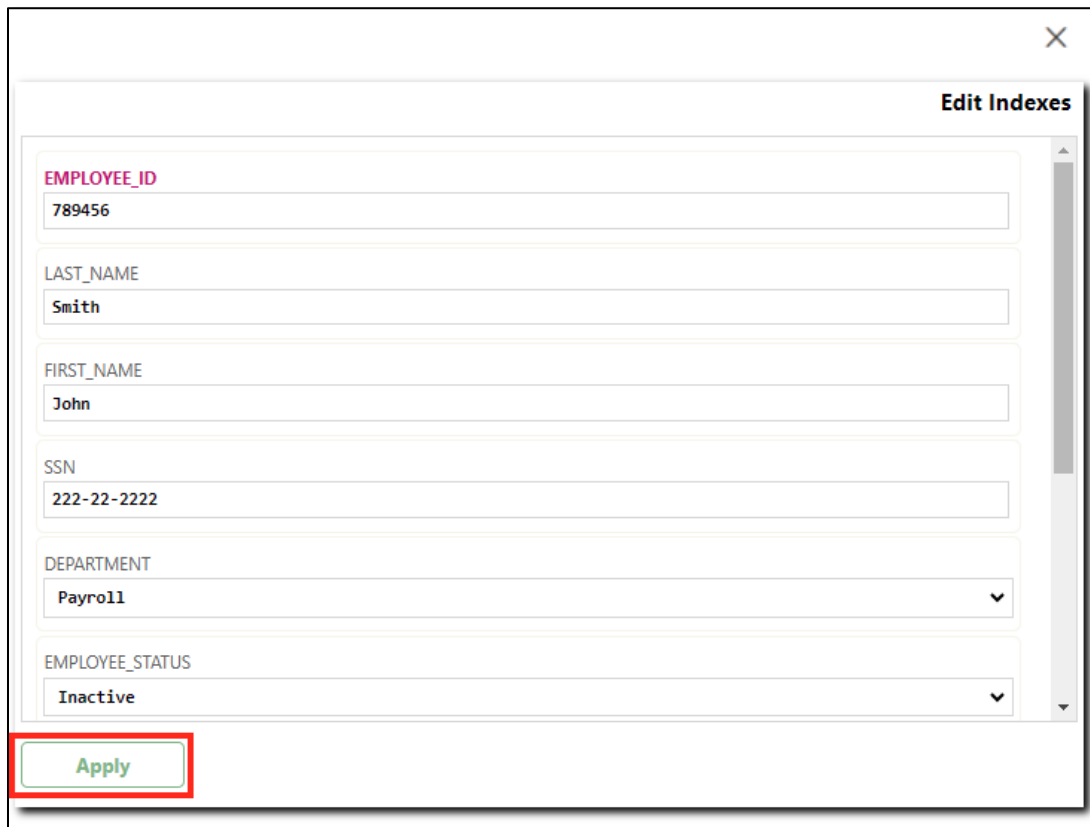
Steps:

1. Click on the **Indexes** button.



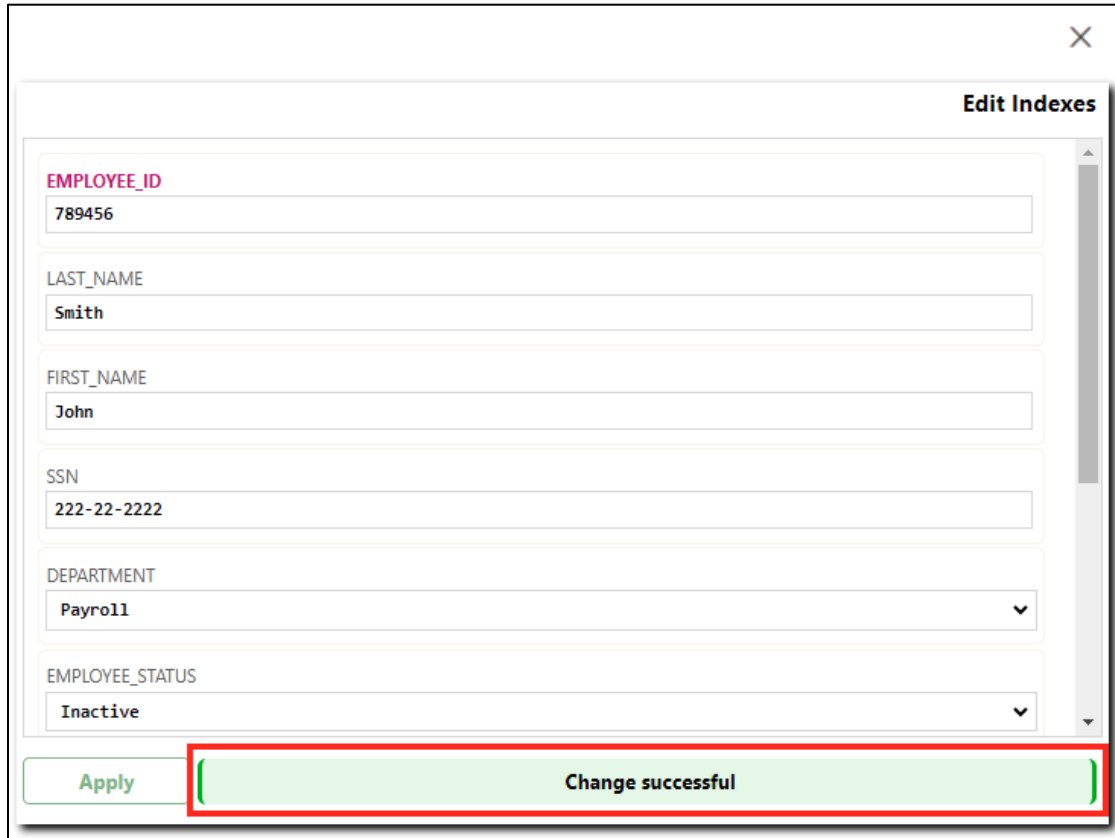
The screenshot shows the k12docs interface. At the top, there is a header with the k12docs logo and a navigation bar. Below the navigation bar, there is a section for 'EMPLOYEE_ID: 789456'. Underneath this, there are three buttons: 'Indexes', 'Notes', and 'Permis'. The 'Indexes' button is highlighted with a red box. Below the buttons, there is a list of folders: 'Administration' and 'Benefits/Health Coverage'.

2. An **Edit Indexes** window will expand.
3. Update the desired folder index field(s).
4. Click on the **Apply** button.



The screenshot shows the 'Edit Indexes' window. The window has a title bar with a close button (X) and the title 'Edit Indexes'. Inside the window, there is a form with several fields: 'EMPLOYEE_ID' (789456), 'LAST_NAME' (Smith), 'FIRST_NAME' (John), 'SSN' (222-22-2222), 'DEPARTMENT' (Payroll), and 'EMPLOYEE_STATUS' (Inactive). At the bottom of the form, there is a green 'Apply' button, which is highlighted with a red box.

5. A message will appear, confirming the update.
6. To close the **Edit Indexes** window, click on the **X**.



The screenshot shows a window titled "Edit Indexes" with a close button (X) in the top right corner. The window contains several input fields for employee information:

- EMPLOYEE_ID**: 789456
- LAST_NAME**: Smith
- FIRST_NAME**: John
- SSN**: 222-22-2222
- DEPARTMENT**: Payroll (dropdown menu)
- EMPLOYEE_STATUS**: Inactive (dropdown menu)

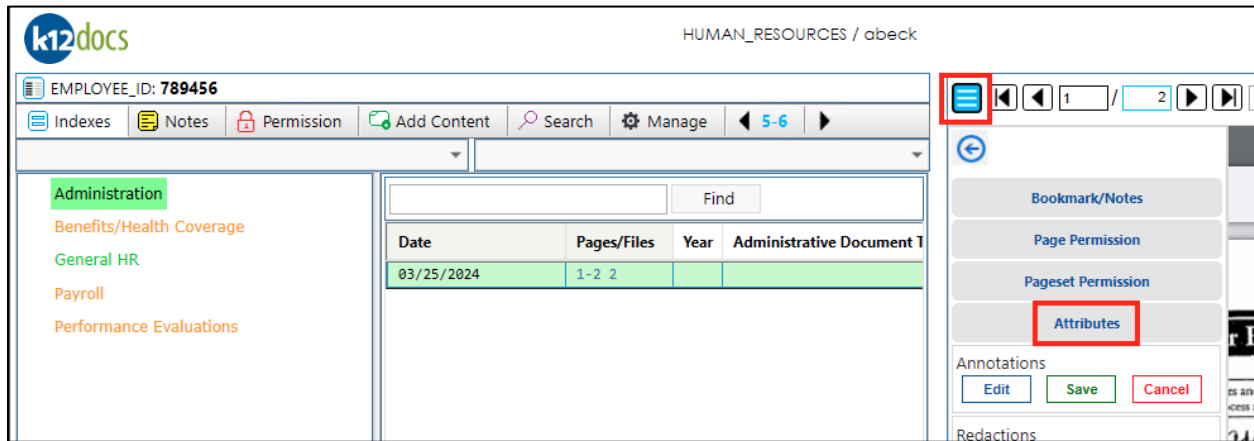
At the bottom left is an "Apply" button. To its right is a green message box with the text "Change successful", which is highlighted by a red rectangle.

Modify: Document Attributes

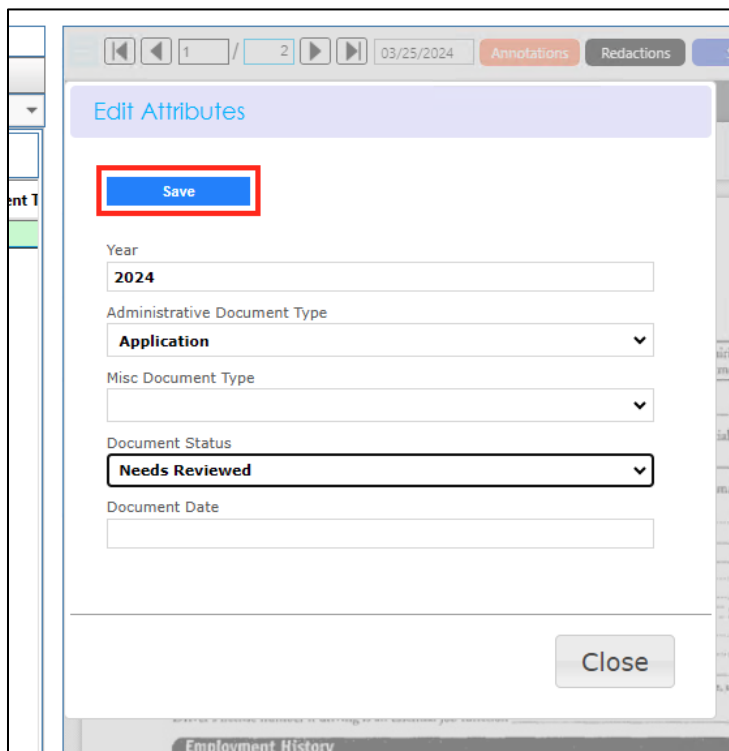
If you find need to update the information entered in the Document Attribute fields for a document, follow the steps listed below:

Steps:

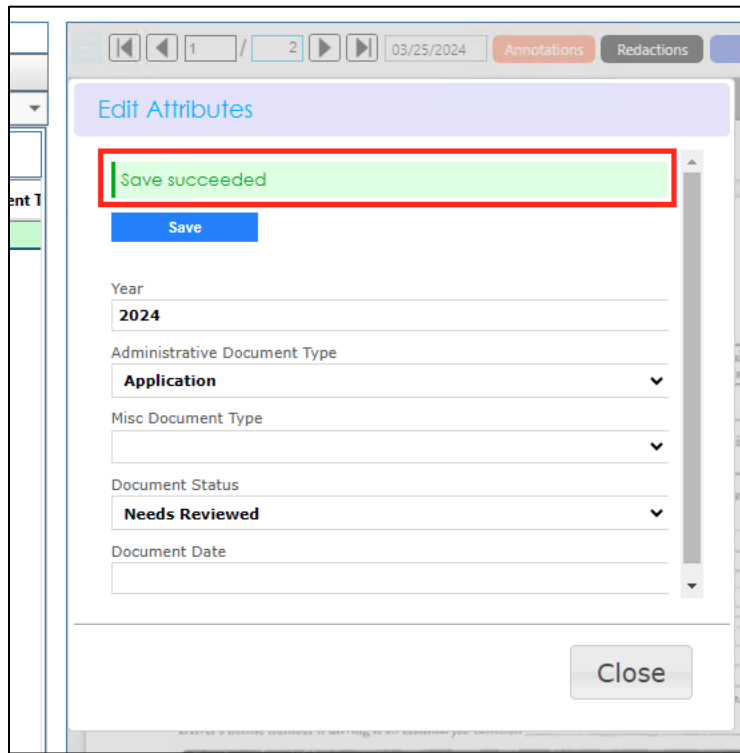
1. Select the document which contains the document attributes you want to update.
2. Select the **Pageset/Page Action Menu**.
3. Click on the **Attributes** button.



4. An **Edit Attributes** window will expand.
5. Update the desired document attribute field(s).
6. Click on the **Save** button.



7. A message will appear, confirming the update.
8. To close the **Edit Indexes** window, click on the **X**.



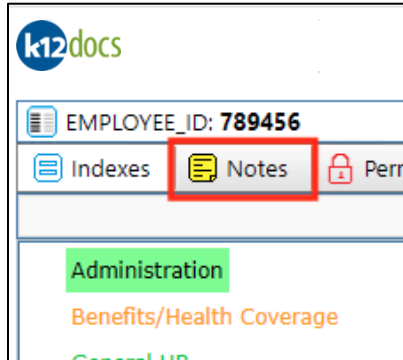
The screenshot shows the 'Edit Attributes' window in the k12docs application. At the top, there is a navigation bar with buttons for 'Annotations' and 'Redactions', and a date field showing '03/25/2024'. Below the navigation bar, the 'Edit Attributes' window is displayed. A green message box at the top of the window says 'Save succeeded'. Below this message is a blue 'Save' button. The window contains several form fields: 'Year' with the value '2024', 'Administrative Document Type' with a dropdown menu showing 'Application', 'Misc Document Type' with a dropdown menu, 'Document Status' with a dropdown menu showing 'Needs Reviewed', and 'Document Date' with an empty text field. A 'Close' button is located at the bottom right of the window.

Notes: Folder

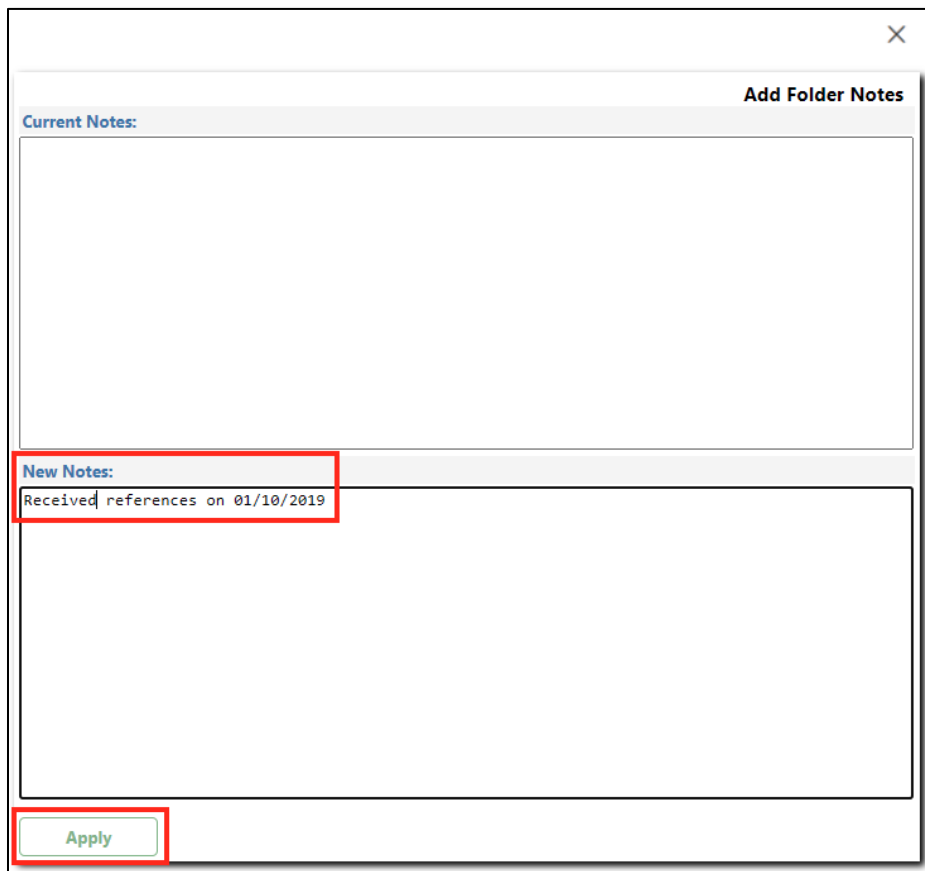
To add notes to a folder, follow the steps listed below:

Steps:

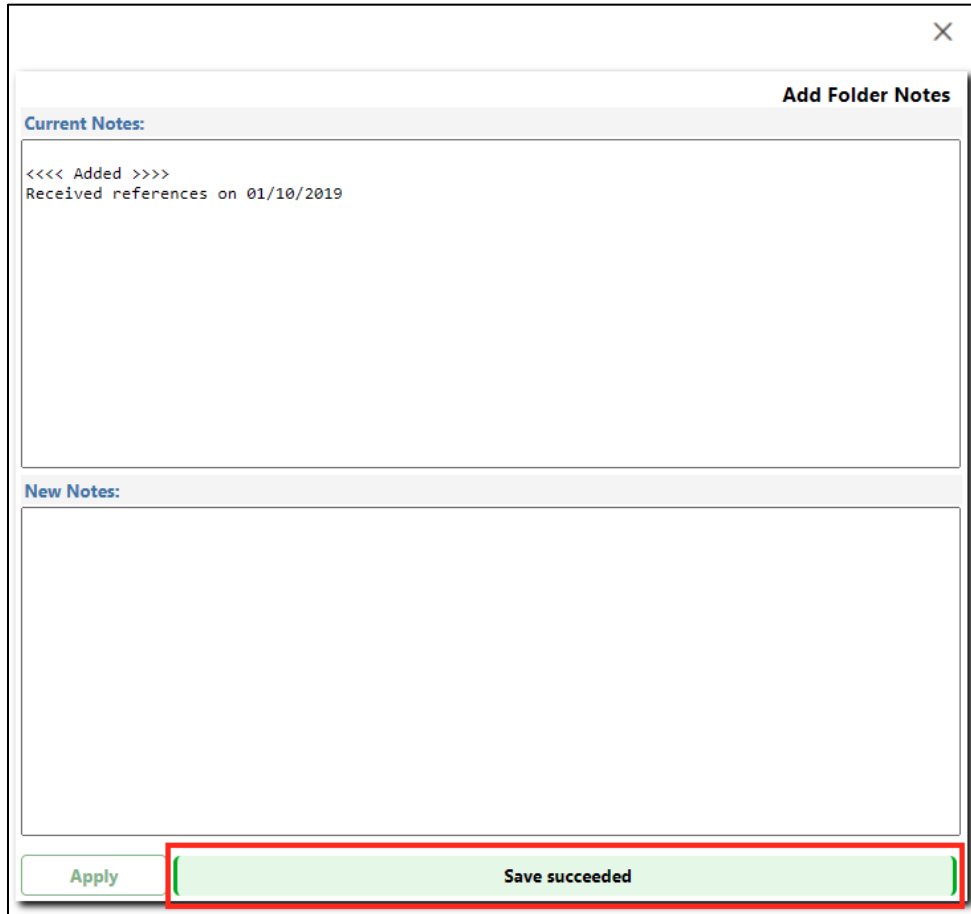
1. Click on the **Notes** button.



2. An **Add Folder Notes** window will expand.
3. Enter the desired note information into the **New Notes** section.
4. Click on the **Apply** button.



5. A message will appear, confirming the note has been added.
6. To close the **Add Folder Notes** window, click on the **X**.



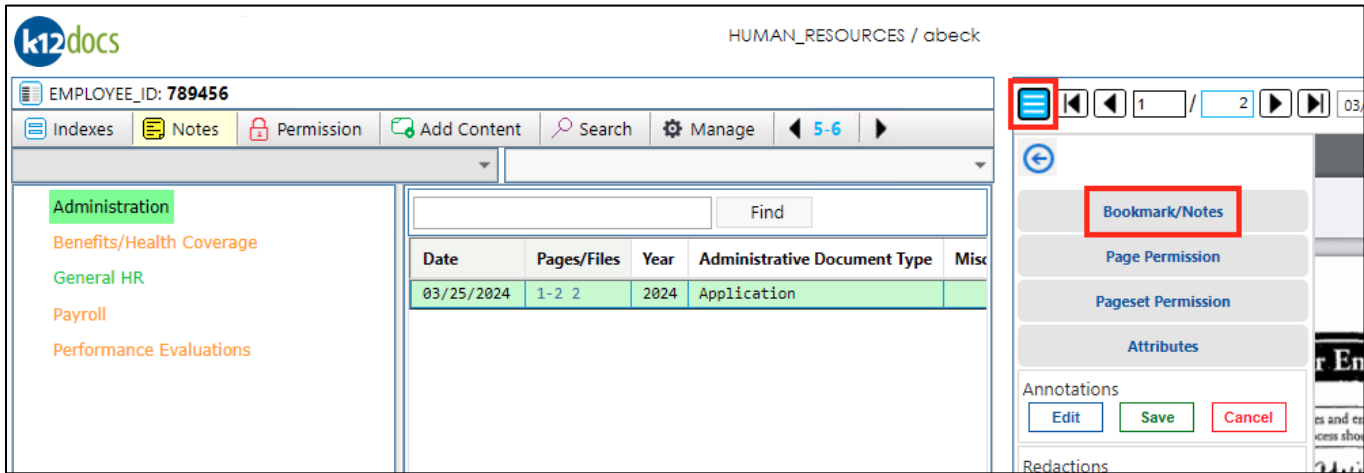
The screenshot shows a window titled "Add Folder Notes" with a close button (X) in the top right corner. The window is divided into two main sections: "Current Notes:" and "New Notes:". The "Current Notes:" section contains the text: "<<< Added >>>>" and "Received references on 01/10/2019". The "New Notes:" section is empty. At the bottom of the window, there is a green bar with a red border. On the left of this bar is a button labeled "Apply". To the right of the "Apply" button is a green box containing the text "Save succeeded".

Notes: Page

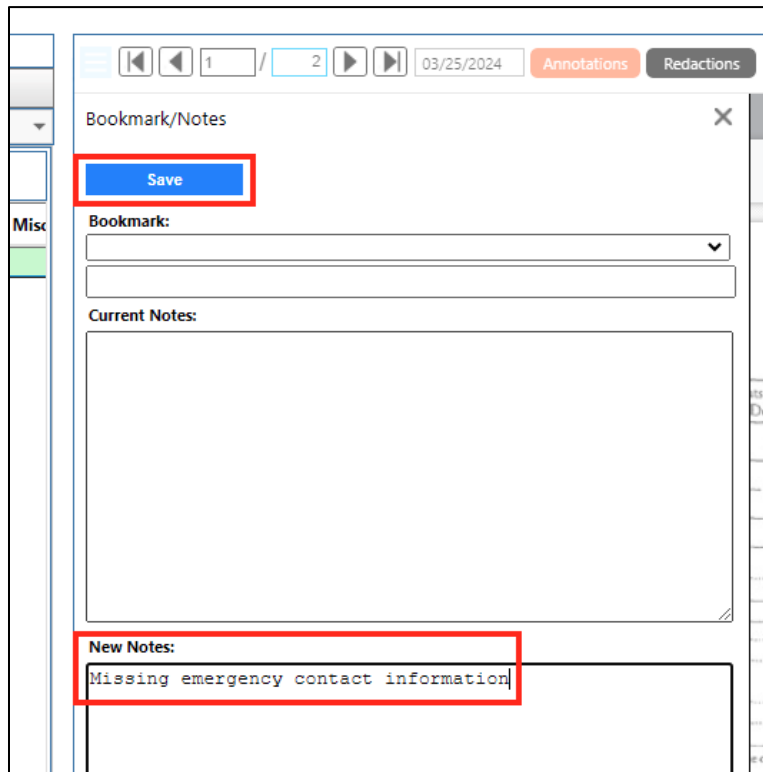
To add notes to a page of a document, follow the steps listed below:

Steps:

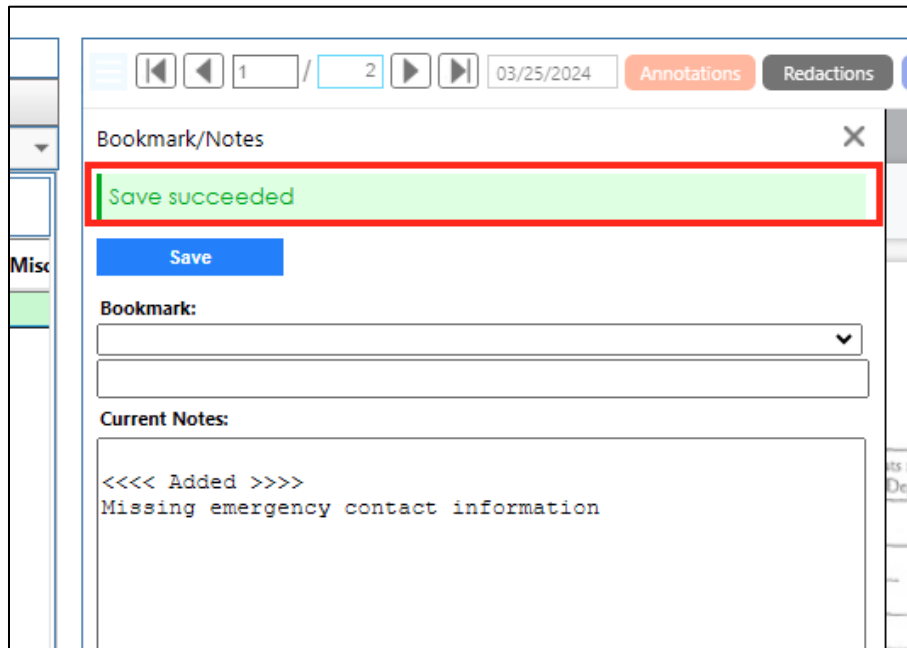
1. Select the page you want to add a note to.
2. Select the **Pageset/Page Action Menu**.
3. Click on the **Bookmark/Notes** button.



4. A **Bookmark/Notes** window will expand.
5. Enter the desired information into the **New Notes** field.
6. Click on the **Save** button.



7. A message will appear, confirming the bookmark has been added.
8. To close the **Bookmark/Notes** window, click on the **X**.

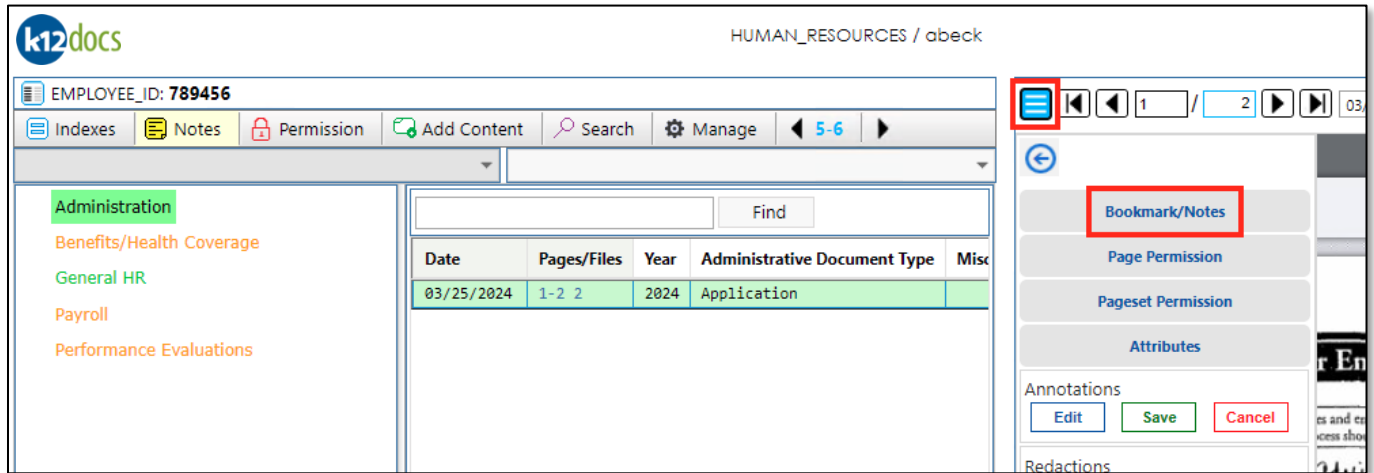


Bookmarks:

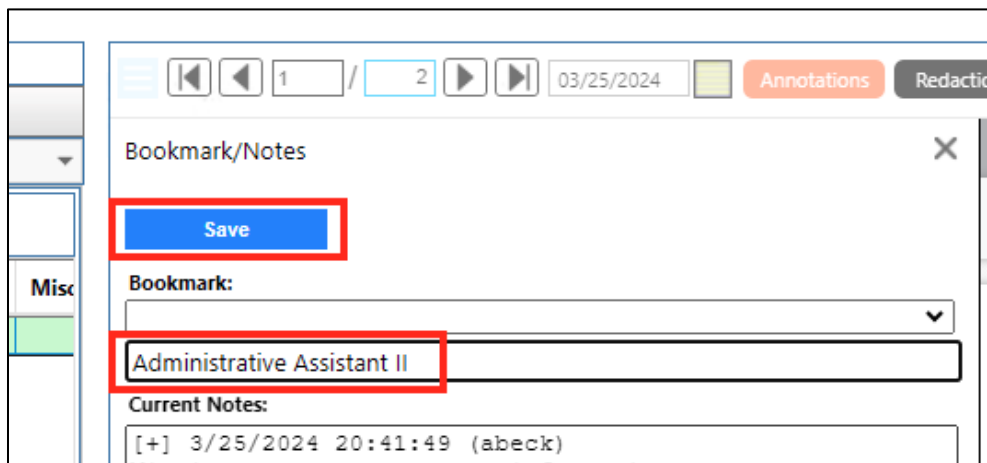
To add a bookmark to a page of a document, follow the steps listed below:

Steps:

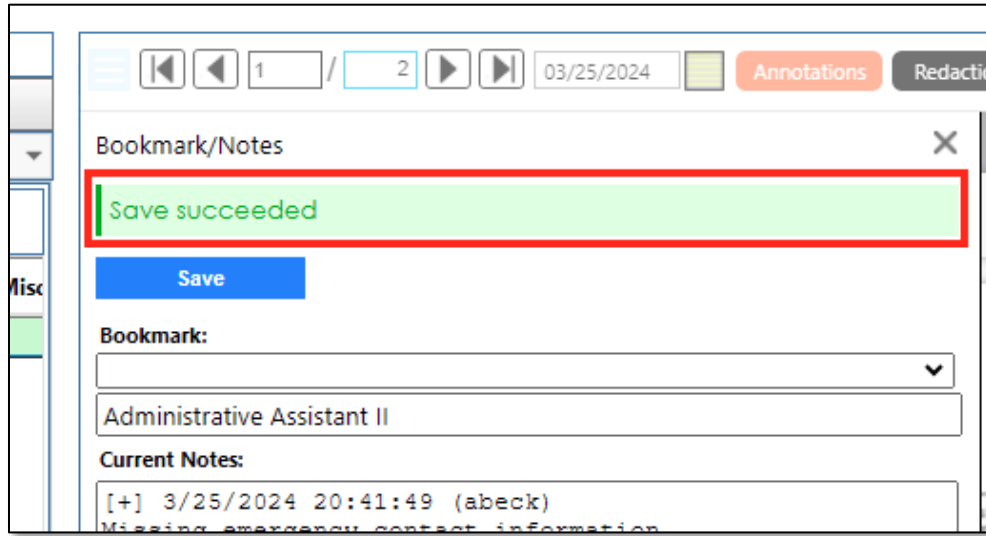
1. Select the page you want to add a bookmark to.
2. Select the **Pageset/Page Action Menu**.
3. Click on the **Bookmark/Notes** button.



4. A **Bookmark/Notes** window will expand.
5. Enter the desired bookmark into the **Bookmark:** field or select a value from the dropdown menu.
6. Click on the **Save** button.

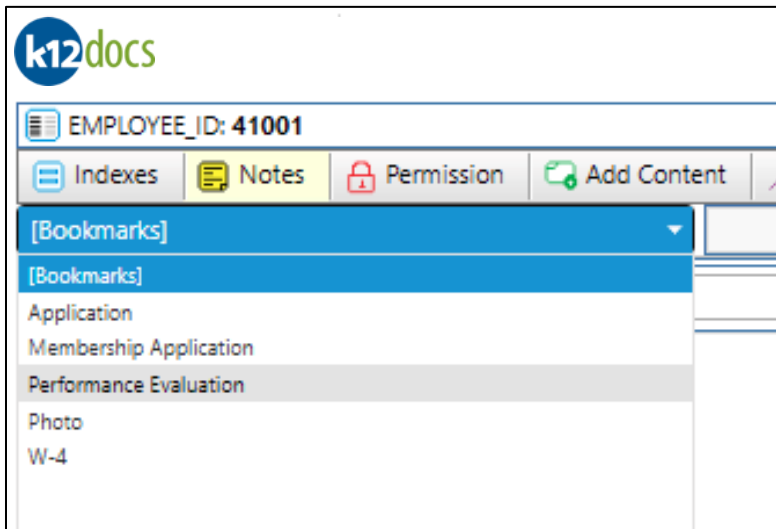


7. A message will appear, confirming the bookmark has been added.
8. To close the **Bookmark/Notes** window, click on the **X**.



Additional Details:

Once Bookmarks are added, you can access them from the Bookmark quick reference menu in the selected folder. When a bookmark is selected from this menu, you will be taken straight to the page with the selected bookmark.



Annotations:

The annotation feature allows you to add highlights, outline boxes, text boxes, and stamps to a page of a document. To use these features, follow the steps listed below:

Annotations: Highlighter

The highlighter annotation allows you to highlight parts of a page as if you were using a highlighter marker on a piece of paper. To use the highlighter annotation, follow the steps below:

Steps:

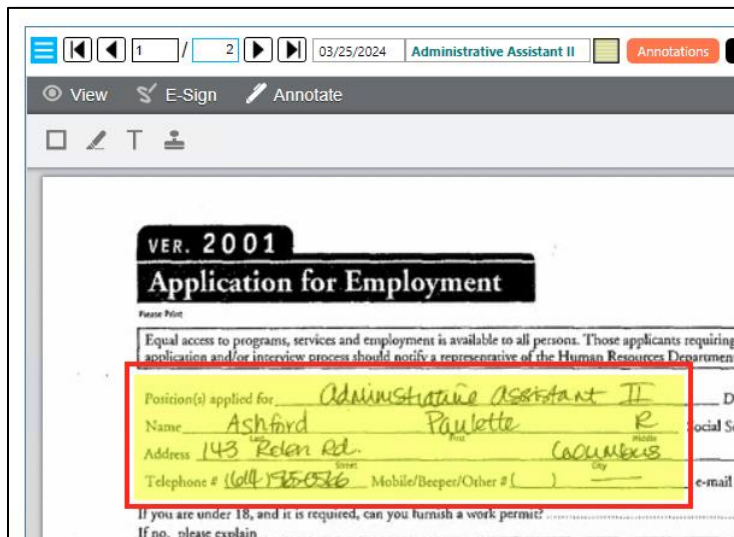
1. Select the page you want to apply the highlighter annotation to.
2. Select the **Annotations** button.
3. Select the **Annotate** button.
4. Select the **Highlight Tool** button.



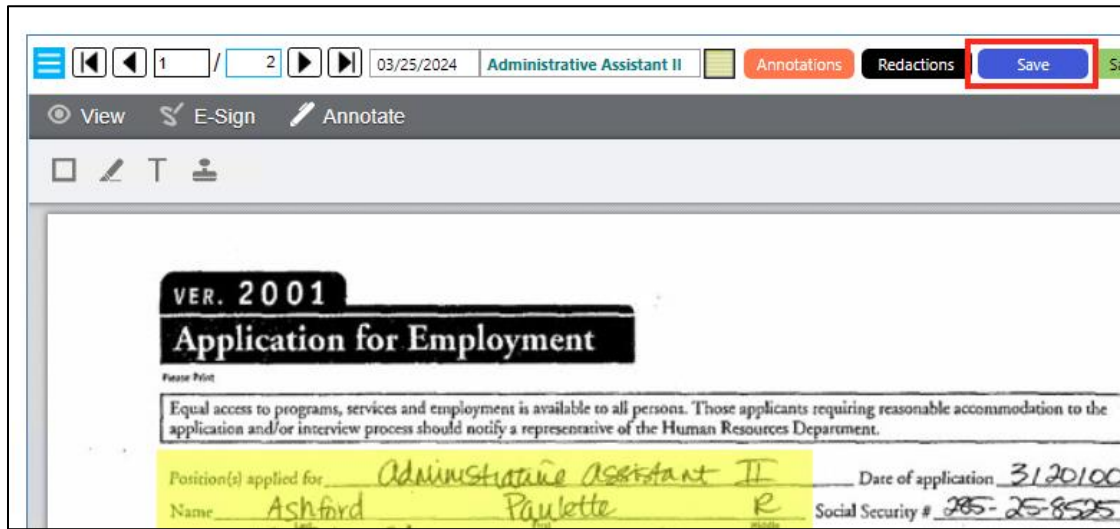
5. To draw the highlighter annotation, using your mouse, hold down the selector button and draw a box over the area you want to highlight. When complete, release the selector button on your mouse.
6. The highlight annotation will now be added to the page.

Note

- a) To move or resize the highlight annotation, select the added annotation to activate the move/resize option and update the position/size of the annotation as desired.
- b) To remove the highlight annotation, select the added annotation to activate the move/resize option and click the **Delete** key on your keyboard.

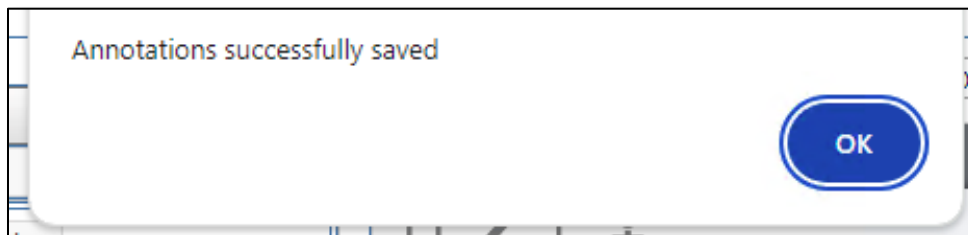


7. Click on the **Save** button to save the highlight annotation to the page.



The screenshot shows the k12docs interface. At the top, there is a toolbar with buttons for 'Annotations', 'Redactions', and 'Save'. The 'Save' button is highlighted with a red rectangle. Below the toolbar, there is a menu bar with 'View', 'E-Sign', and 'Annotate'. The main content area displays a document titled 'VER. 2001 Application for Employment'. A yellow highlight is applied to the 'Position(s) applied for' field, which contains the text 'Administrative Assistant II'. Other fields include 'Date of application' (3/20/00), 'Name' (Ashford, Paulette), and 'Social Security #' (205-25-8525).

8. A confirmation window will pop up confirming the annotation was successfully saved.
9. Click on the **OK** button.



The screenshot shows a confirmation window with the text 'Annotations successfully saved' and a blue 'OK' button.

Annotations: Box

The box annotation allows you place an outline box on a page. To use the box annotation, follow the steps below:

Steps:

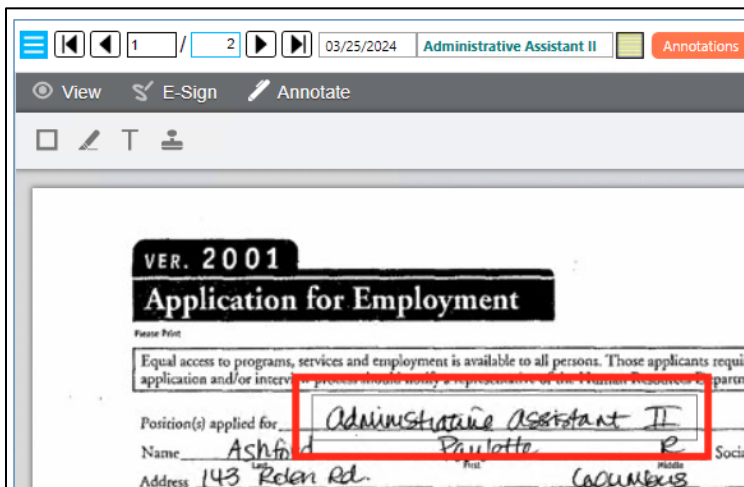
1. Select the page you want to apply the box annotation to.
2. Select the **Annotations** button.
3. Select the **Annotate** button.
4. Select the **Box Tool** button.



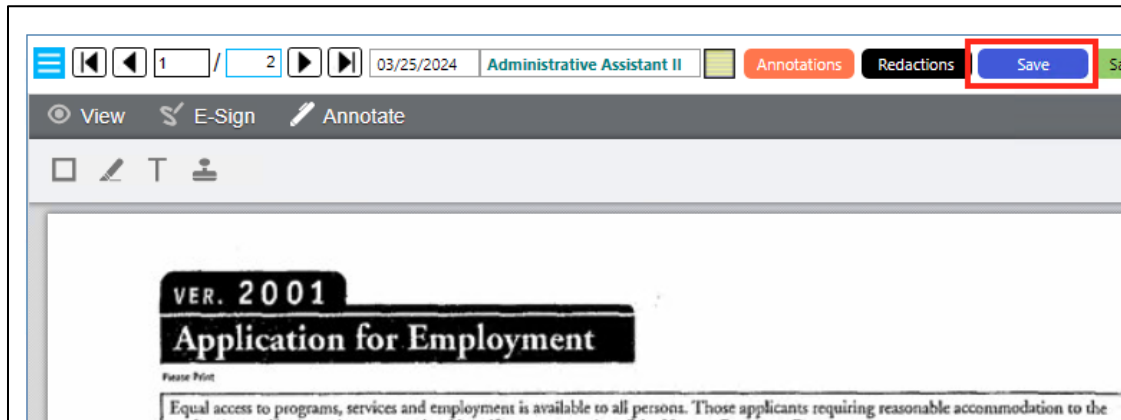
5. To draw the box annotation, using your mouse, hold down the selector button and draw a box over the area you want to outline. When complete, release the selector button on your mouse.
6. The box annotation will now be added to the page.

Note

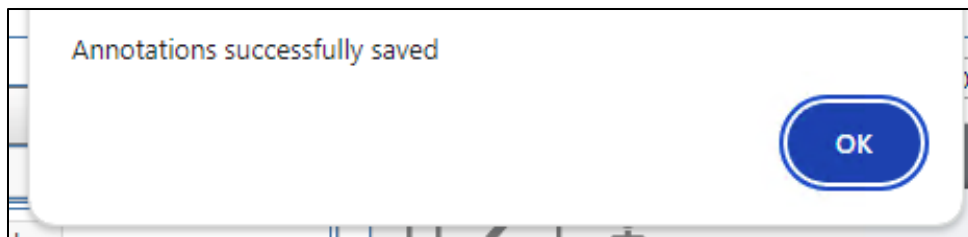
- a) To move or resize the box annotation, select the added annotation to activate the move/resize option and update the position/size of the annotation as desired.
- b) To remove the box annotation, select the added annotation to activate the move/resize option and click the **Delete** key on your keyboard.



- Click on the **Save** button to save the box annotation to the page.



- A confirmation window will pop up confirming the annotation was successfully saved.
- Click on the **OK** button.



Annotations: Text

The text annotation allows you to add text boxes to a page. To use the text annotation, follow the steps below:

Steps:

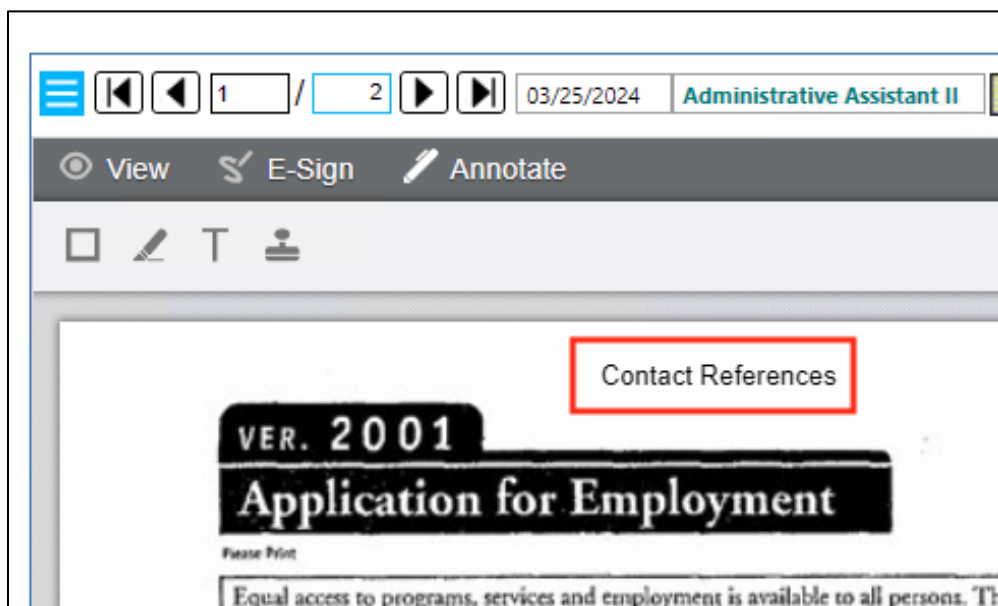
1. Select the page you want to apply the text annotation to.
2. Select the **Annotations** button.
3. Select the **Annotate** button.
4. Select the **Text Tool** button.



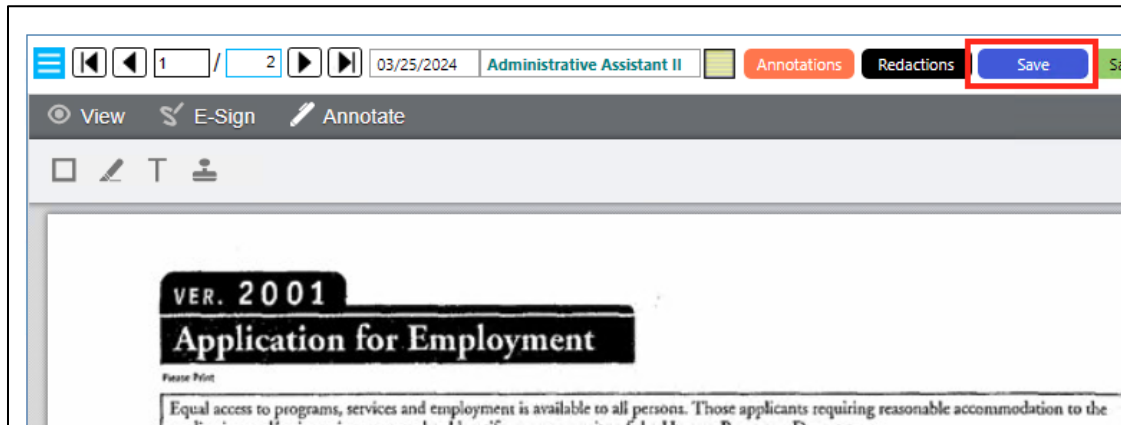
5. To draw the text annotation, using your mouse, hold down the selector button and draw a box over the area you want to text to appear. When complete, release the selector button on your mouse.
6. Once the text annotation is added to the page, begin typing the text you want in the box.

Note

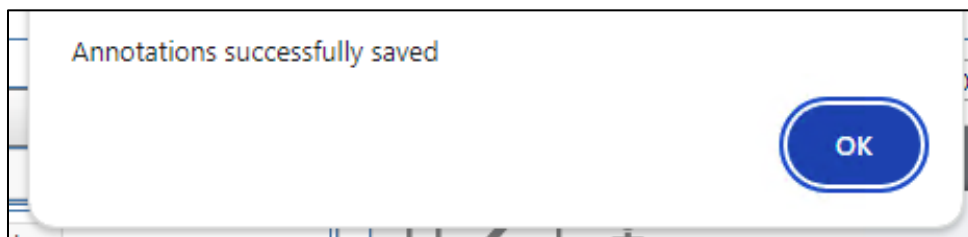
- a) To move, resize, or edit text in the text annotation, select the added annotation to activate the move/resize/edit option and update the position/size/text of the annotation as desired.
- b) To remove the text annotation, select the added annotation to activate the move/resize/edit option and click the **Delete** key on your keyboard.



7. Click on the **Save** button to save the text annotation to the page.



8. A confirmation window will pop up confirming the annotation was successfully saved.
9. Click on the **OK** button.



Annotations: Stamp

The stamp annotation allows you place stamps on a page. To use the stamp annotation, follow the steps below:

Steps:

1. Select the page you want to apply the stamp annotation to.
2. Select the **Annotations** button.
3. Select the **Annotate** button.
4. Select the **Stamp Tool** button.



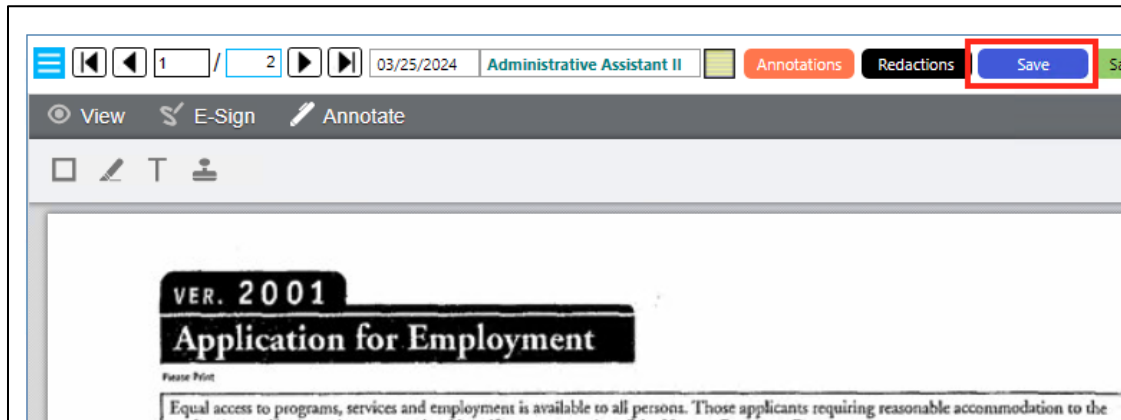
5. To draw the stamp annotation, using your mouse, hold down the selector button and draw a box over the area you want to outline. When complete, release the selector button on your mouse.
6. The stamp annotation will now be added to the page.

Note

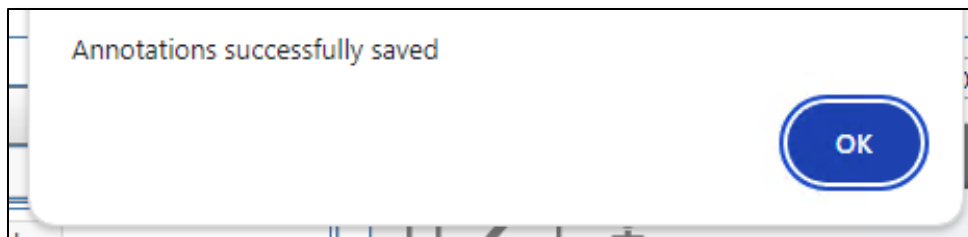
- a) To move or resize the stamp annotation, select the added annotation to activate the move/resize option and update the position/size of the annotation as desired.
- b) To remove the stamp annotation, select the added annotation to activate the move/resize option and click the **Delete** key on your keyboard.



7. Click on the **Save** button to save the stamp annotation to the page.



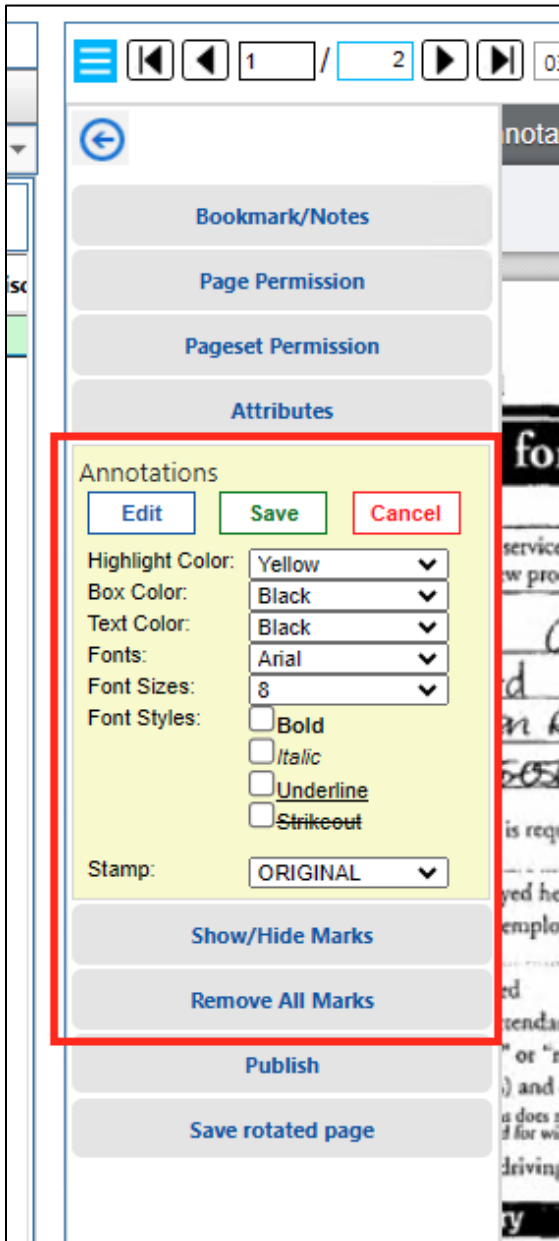
8. A confirmation window will pop up confirming the annotation was successfully saved.
9. Click on the **OK** button.



Annotations: Additional Options

Some of the additional options for annotations are:

- **Customizing Annotations:** Allows you to choose different colors, text/fonts, or stamp wording for the different annotations. Simply select the color/text/font you want to use, collapse the Pageset/Page action menu, then select the annotation icon you want to use and draw it on the page.
- **Show/Hide Marks:** When selected, this option will hide all annotation on the selected page or show all annotations on the selected page.
- **Remove All Marks:** When selected, this option will remove/delete all annotations from the selected page.



The screenshot shows the k12docs interface with the Annotations menu open. The menu is highlighted with a red border. The menu contains the following options:

- Edit** (blue button)
- Save** (green button)
- Cancel** (red button)
- Highlight Color:** Yellow (dropdown)
- Box Color:** Black (dropdown)
- Text Color:** Black (dropdown)
- Fonts:** Arial (dropdown)
- Font Sizes:** 8 (dropdown)
- Font Styles:**
 - ☐ Bold
 - ☐ Italic
 - ☐ Underline
 - ☐ Strikeout
- Stamp:** ORIGINAL (dropdown)
- Show/Hide Marks** (blue button)
- Remove All Marks** (blue button)
- Publish** (blue button)
- Save rotated page** (blue button)

Redactions:

The redaction feature enables you to black out certain information on a page from view. This could be sensitive data like social security numbers or other personal information that needs to be blacked out. To use the redaction feature, follow the steps listed below:

Steps:

1. Select the page you want to add a redaction to.
2. Click on the **Redactions** button.
3. Click on the **Redact** button.
4. Select the **Redaction** icon.



5. To draw the redaction, using your mouse, hold down the selector button and draw a black box over the area you want the redaction to appear. When complete, release the selector button on your mouse.
6. The redaction will now be added to the page.

Note

a) If you want to move or resize the redaction, select the added redaction to activate the move/resize option and update the position/size of the redaction as desired.

VER. 2001
Application for Employment

Please Print

Equal access to programs, services and employment is available to all persons. Those applicants requiring reasonable accommodation to the application and/or interview process should notify a representative of the Human Resources Department.

Position(s) applied for: Administrative Assistant II Date of application: 3/20/00

Name: Ashford Paulette R Social Security #: [Redacted]

Address: 143 Eden Rd. Columbus GA 31906

Telephone #: (604) 955-0536 Mobile/Beeper/Other #: () e-mail Address:

7. Select the redaction.
8. Click the **Page/Pageset Action Menu** for it to expand.
9. Enter the **PAL** you would like the redaction to have.

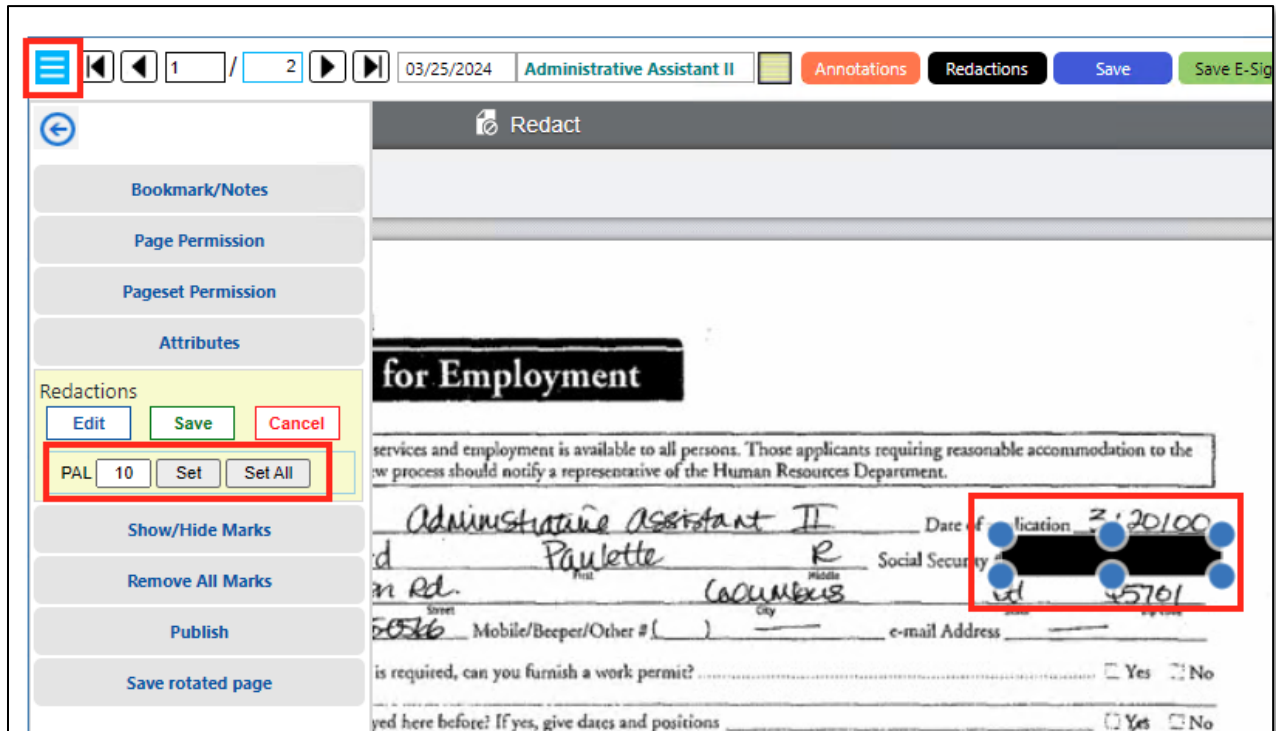
Note

a) K12Docs utilizes 100 levels of security known as Permission Access Levels (PAL), which are set between 0 and 99. PALs establish the level at which a user may or may not see a redaction. Once a redaction PAL is set, if a user logs into K12Docs with a PAL that is lower than the redaction PAL, the user will see the redacted area on the page. If a user logs into K12Docs with a PAL equal to or higher than the redactions PAL, the user will NOT see a redacted area on the page. For example, if a user has a PAL of 50 and the redacted area has a PAL of 55, the user will see the redacted area on the page. If a user has a PAL of 60, they will not see a redacted area on the page.

10. Click on the **Set** button.

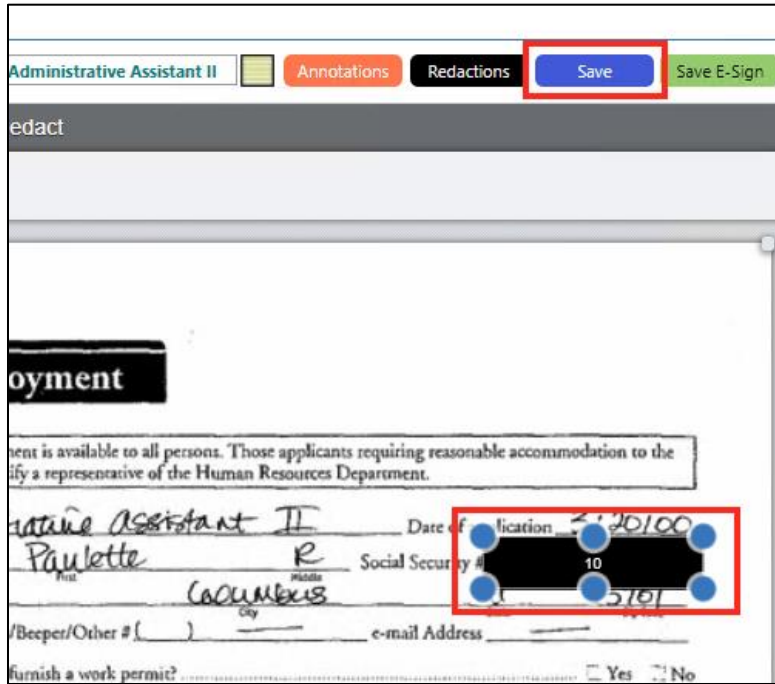
Note

a) If there are multiple redactions on a page and you want them to all have the same PAL, select the **Set All** button.



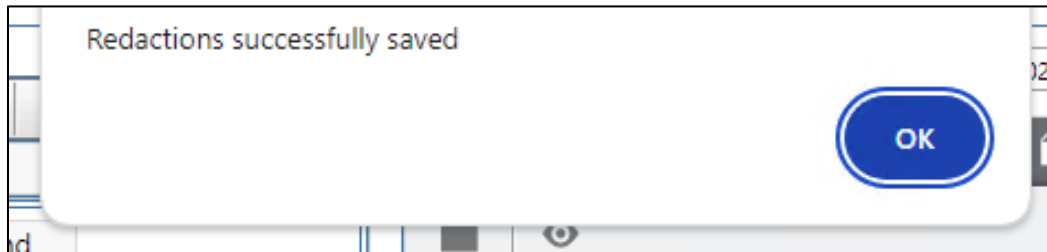
The screenshot shows the K12Docs interface. On the left, a sidebar menu is open, highlighting the 'Redactions' section. Within this section, the 'PAL' field is set to '10', and the 'Set All' button is highlighted. The main document area displays a form titled 'for Employment'. A redaction box is applied to the 'Date of Birth' field, which contains the text '3/20/00'. The redaction box is highlighted with a red border. The form also includes fields for 'Name' (Paulette), 'Social Security' (R), 'City' (Columbus), and 'e-mail Address'.

11. The PAL will now be applied to the selected redaction.
12. Click on the **Save** button to save the redaction to the page.



The screenshot shows a web interface with a top navigation bar containing buttons for 'Administrative Assistant II', 'Annotations', 'Redactions', 'Save', and 'Save E-Sign'. The 'Save' button is highlighted with a red rectangle. Below the navigation bar, there is a form titled 'edact'. The form contains a section labeled 'oyment' and a paragraph of text: 'ment is available to all persons. Those applicants requiring reasonable accommodation to the lify a representative of the Human Resources Department.' Below this, there is a form with fields for 'Date of Application' (3/20/00), 'Social Security #', 'City' (Columbus), and 'e-mail Address'. A redaction box is placed over the 'Social Security #' field, and the 'Save' button is highlighted with a red rectangle.

13. A confirmation window will pop up confirming the redaction was successfully saved to the page.
14. Click on the **OK** button.



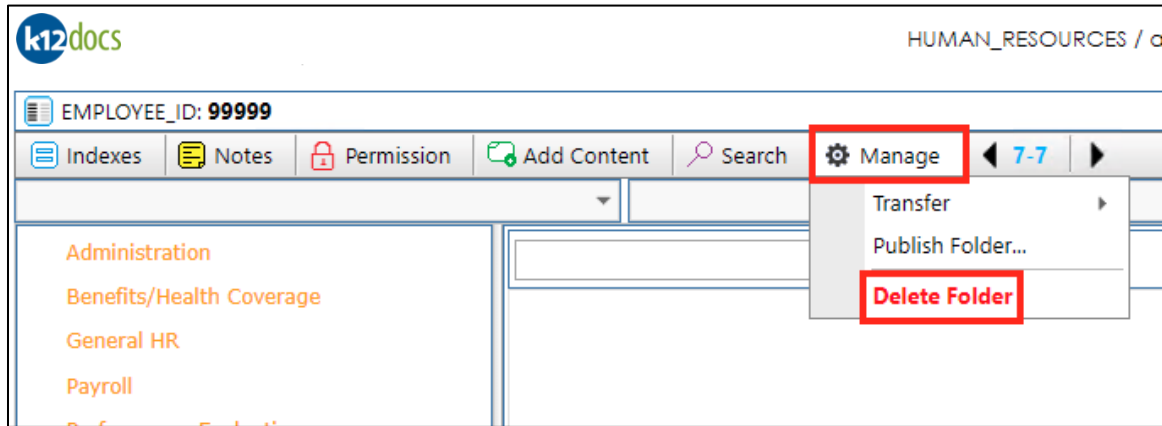
The screenshot shows a confirmation window with the title 'Redactions successfully saved'. The window has a blue 'OK' button in the bottom right corner. The background of the window is white, and the text is in a dark blue font.

Delete: Folder

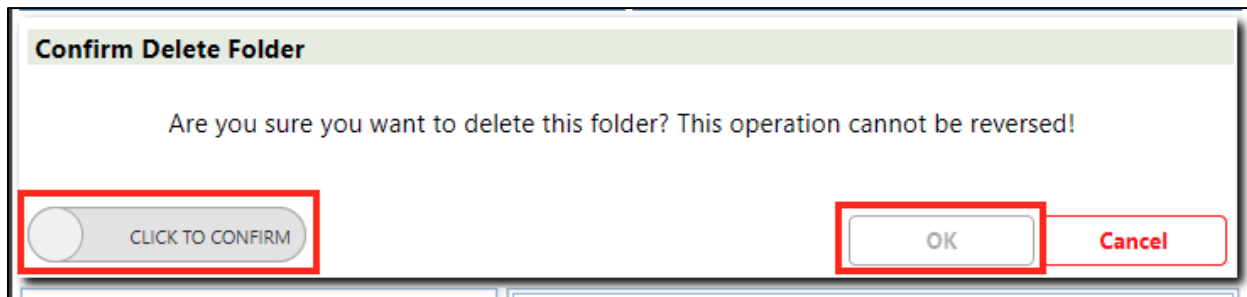
To delete a folder, follow the steps listed below:

Steps:

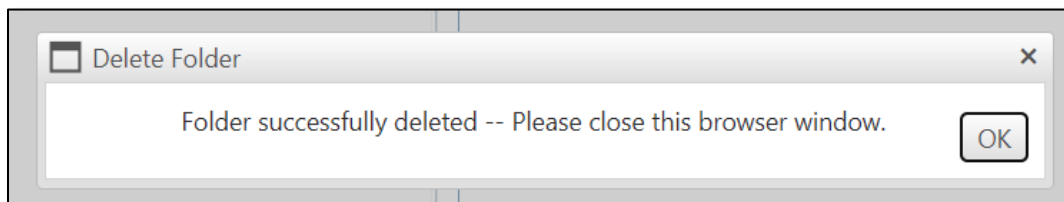
1. Locate and open the folder you want to delete.
2. Click on the **Manage** button.
3. Click on the **Delete Folder** button.



4. A **Confirm Delete Folder** window will expand.
5. Click on the **Click to Confirm** button.
6. Click on the **OK** button.



7. A confirmation window will pop up confirming the folder was successfully deleted.
8. Click on the **OK** button.

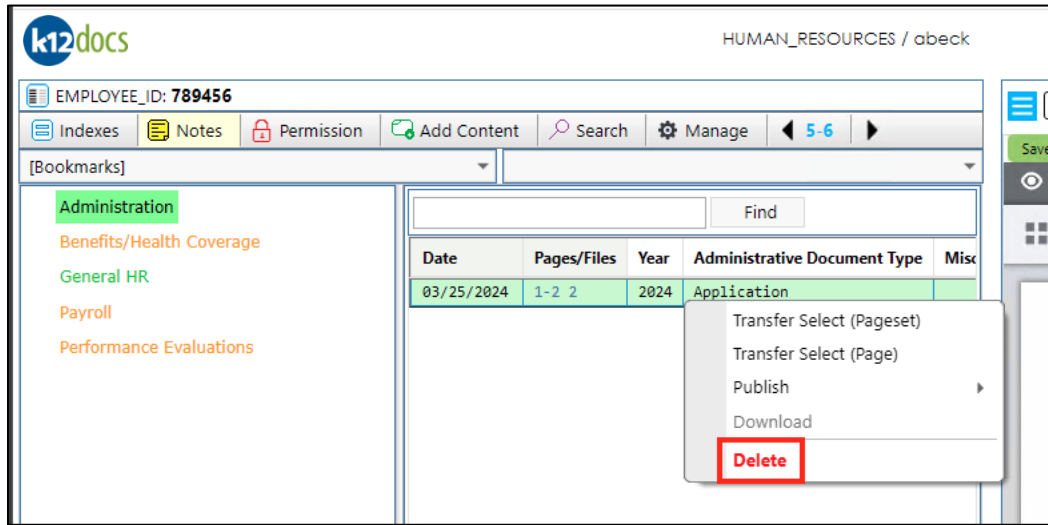


Delete: Document

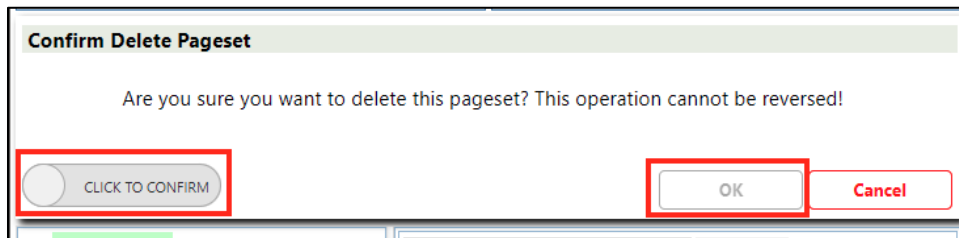
To delete a document, follow the steps listed below:

Steps:

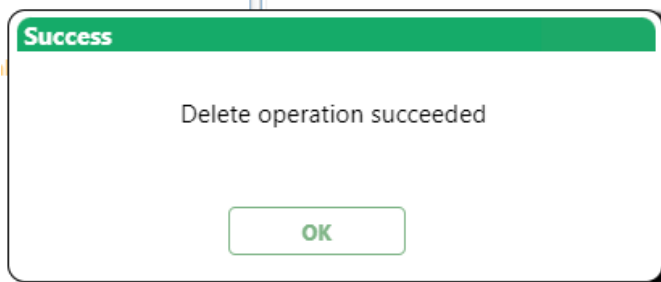
1. Select the document you want to delete.
2. Right-click on the document.
3. Select the **Delete** button.



4. A **Confirm Delete Pageset** window will expand.
5. Click on the **Click to Confirm** button.
6. Click on the **OK** button.



7. A confirmation window will pop up confirming the document was successfully deleted.
8. Click on the **OK** button.

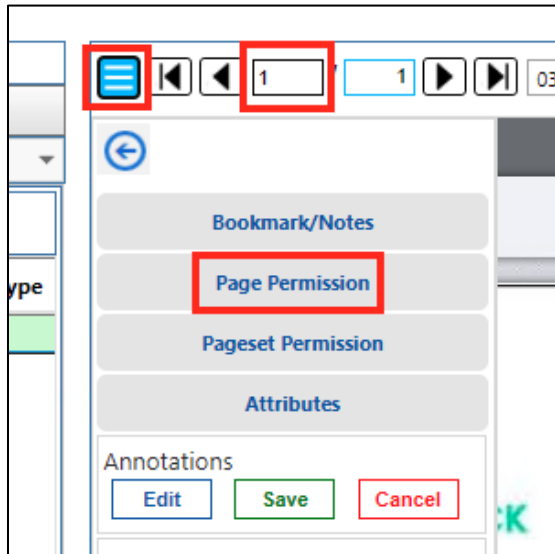


Delete: Page

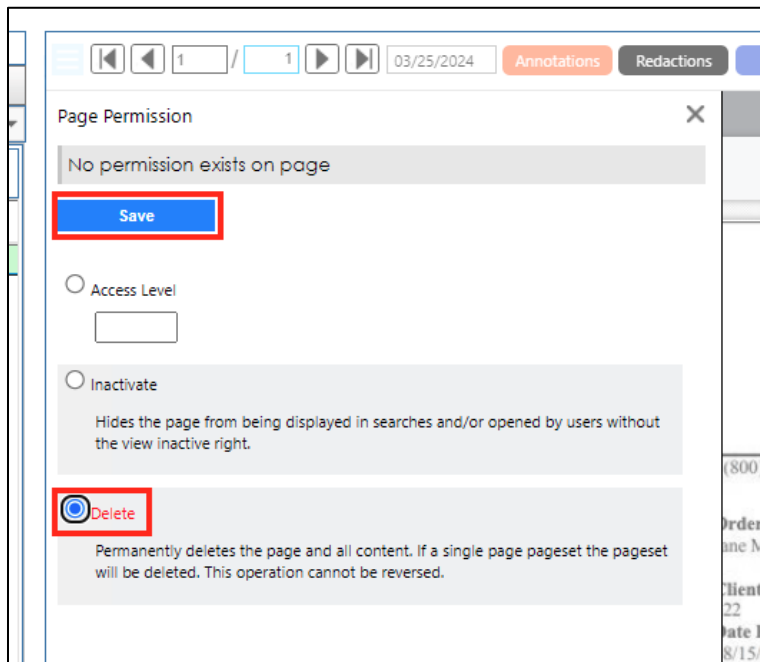
To delete a page, follow the steps listed below:

Steps:

1. Select the page you want to delete.
2. Click on the **Page/Pageset Action Menu** icon.
3. Click on the **Page Permission** button.



4. A **Page Permission** window will expand.
5. Place a dot in the **Delete** button.
6. Click on the **Save** button.



7. A message will appear, confirming the page has been deleted.
8. To close the **Page Permission** window, click on the **X**.



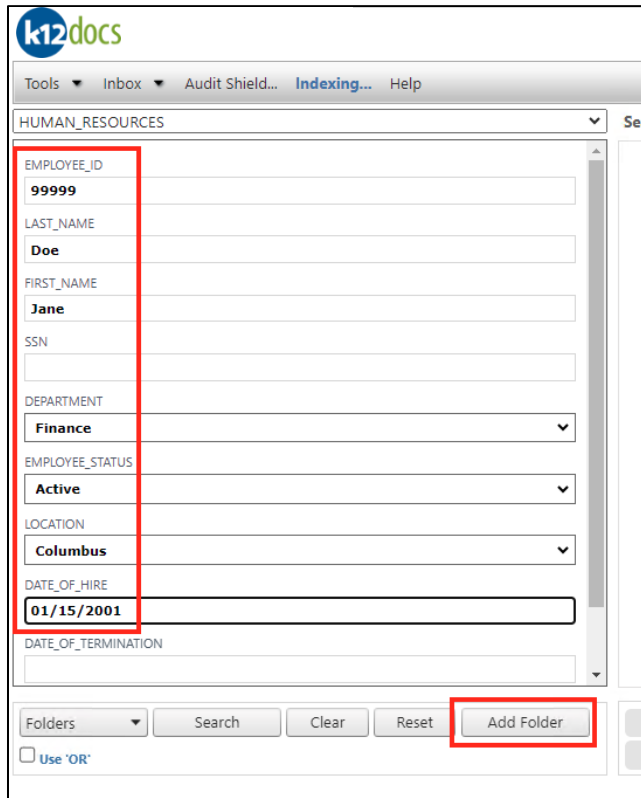
9. To refresh the **Portfolio** window, right-click anywhere and select the **Reload** option.

Adding a New Folder:

To create a new empty folder, follow the steps listed below:

Steps:

1. Enter the information for the new folder into the provided folder index fields.
2. Click on the **Add Folder** button.

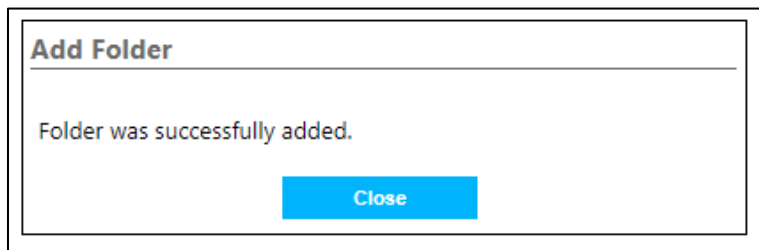


The screenshot shows the 'Add Folder' form in the k12docs application. The form is titled 'HUMAN_RESOURCES' and includes a search bar. The fields are as follows:

- EMPLOYEE_ID: 99999
- LAST_NAME: Doe
- FIRST_NAME: Jane
- SSN: (empty)
- DEPARTMENT: Finance
- EMPLOYEE_STATUS: Active
- LOCATION: Columbus
- DATE_OF_HIRE: 01/15/2001
- DATE_OF_TERMINATION: (empty)

At the bottom of the form, there are buttons for 'Folders', 'Search', 'Clear', 'Reset', and 'Add Folder'. The 'Add Folder' button is highlighted with a red box. There is also a checkbox labeled 'Use OR'.

3. A message will appear, confirming the folder has been created.
4. Click on the **Close** button.




The screenshot shows a confirmation message box titled 'Add Folder'. The message text is 'Folder was successfully added.' and there is a blue 'Close' button at the bottom right.

E-Sign Documents:

E-sign allows you to digitally sign a page of a document. To e-sign a document, follow the steps below:


Steps:

1. Select the page you want to E-sign.
2. Select the **E-sign** button.
3. Select your e-signature option:

- a. **Freehand Signature**  – allows you to draw your e-signature.

- a) To create the Freehand Signature, use your mouse to draw your signature in the open box, then click the **Save** button.



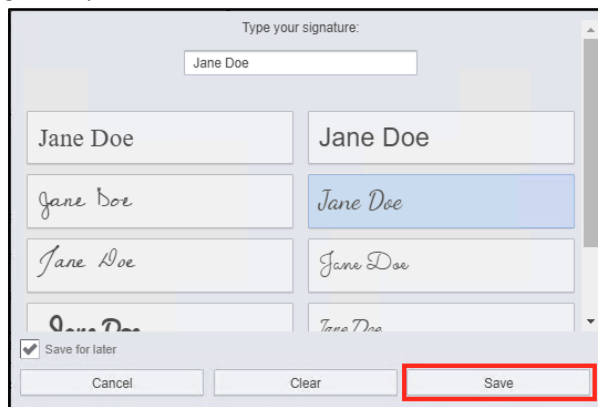
- b) Clear – will clear the Freehand Signature drawing from the open box for you to try drawing again.
- c) Cancel – will cancel the Freehand Signature drawing process and close the window.
- d) Save for later – when checked, will add the created Freehand Signature to the **Manage E-signatures** library. 


Note

OR

- b. **Text Signature**  – allows you to type your e-signature and choose a typed font to represent your e-signature.

- a) To create the Text Signature, type your signature into the provided field, select the font of the signature you want, then click the **Save** button.



- b) Clear – will clear the Text Signature from the field for you to type again.
- c) Cancel – will cancel the Text Signature creation process and close the window.
- d) Save for later – when checked, will add the create Text Signature to the **Manage E-signatures** library. 

Note

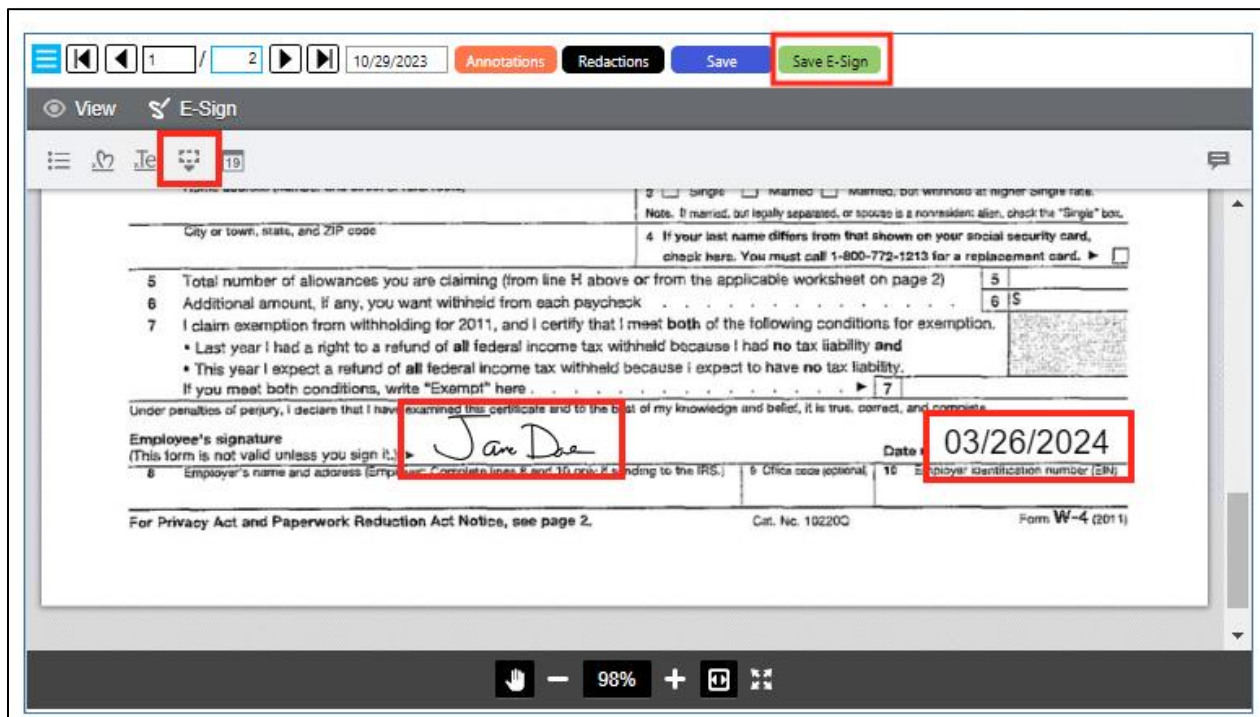


4. Select the **Place E-signature** button.
5. Place the signature on the page.

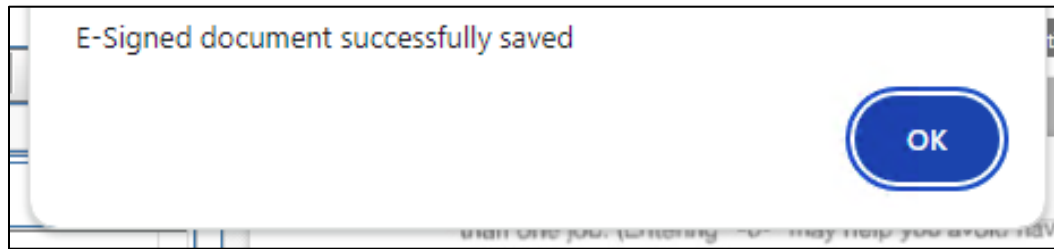
Note

- a) To move or resize the E-signature, select the added E-signature to activate the move/resize option and update the position/size of the E-signature as desired.
- b) To remove the E-signature, select the added E-signature to activate the move/resize option and click the **Delete** key on your keyboard.

6. If you want to place the current days date on the page, select the **Place Date** button.
7. When done, select the **Save E-sign** button.



8. A confirmation window will pop up confirming the E-signature was successfully saved to the page.
9. Click on the **OK** button.

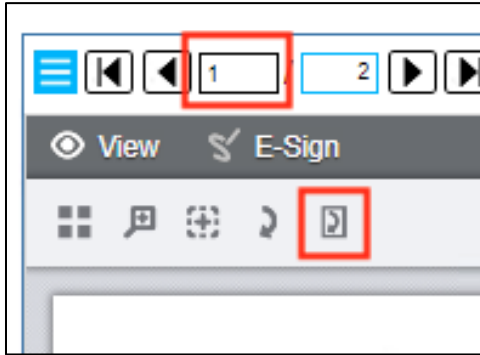


Rotation: Page

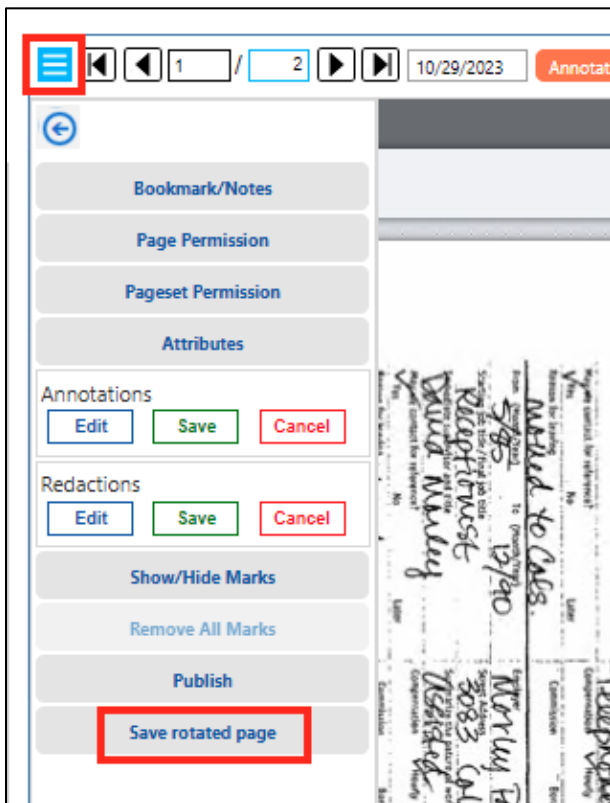
To rotate a page, follow the steps listed below:

Steps:

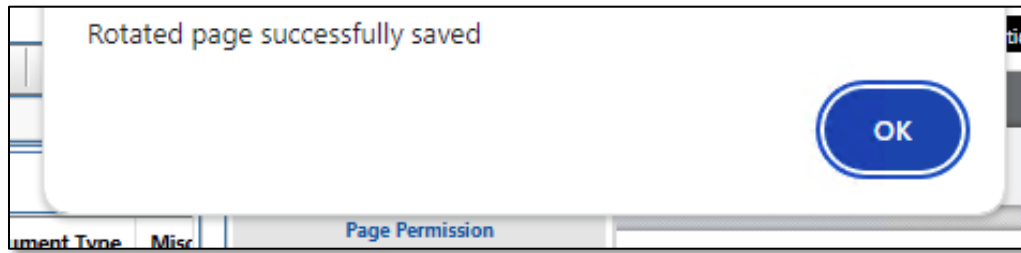
1. Select the page you want to rotate.
2. Click on the **Rotate Page** button.



3. The page will rotate 90 degrees to the right. Continue rotate until the page is in the desired direction.
4. Click on the **Pageset/Page Actions Menu**.
5. Click on the **Save rotated page** button.



6. A confirmation window will pop up confirming the rotated page is successfully saved.
7. Click on the **OK** button.

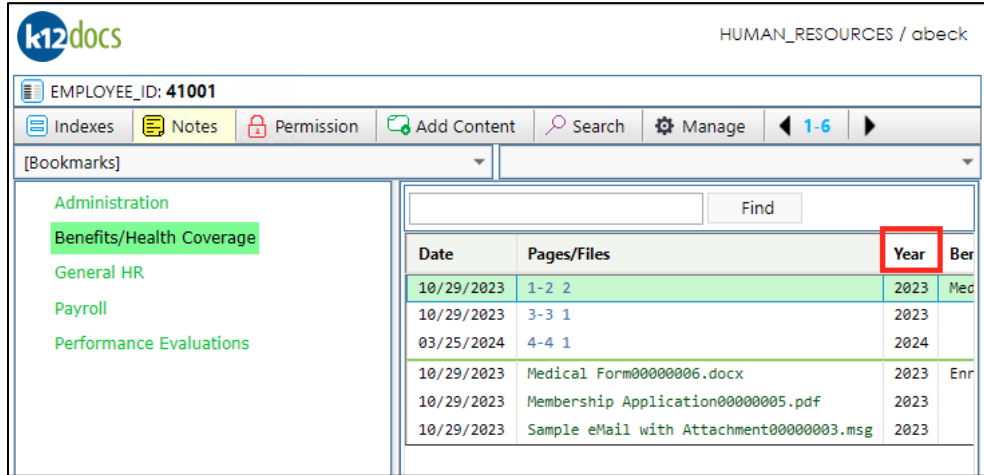


Sorting: Document Attribute Fields in Folder

To sort the document attributes fields within a folder, follow the steps listed below:

Steps:

1. Select the subfolder that contains the document attributes you want to sort.
2. Click on the column header of the document attribute you want to sort.



EMPLOYEE_ID: 41001

Indexes Notes Permission Add Content Search Manage 1-6

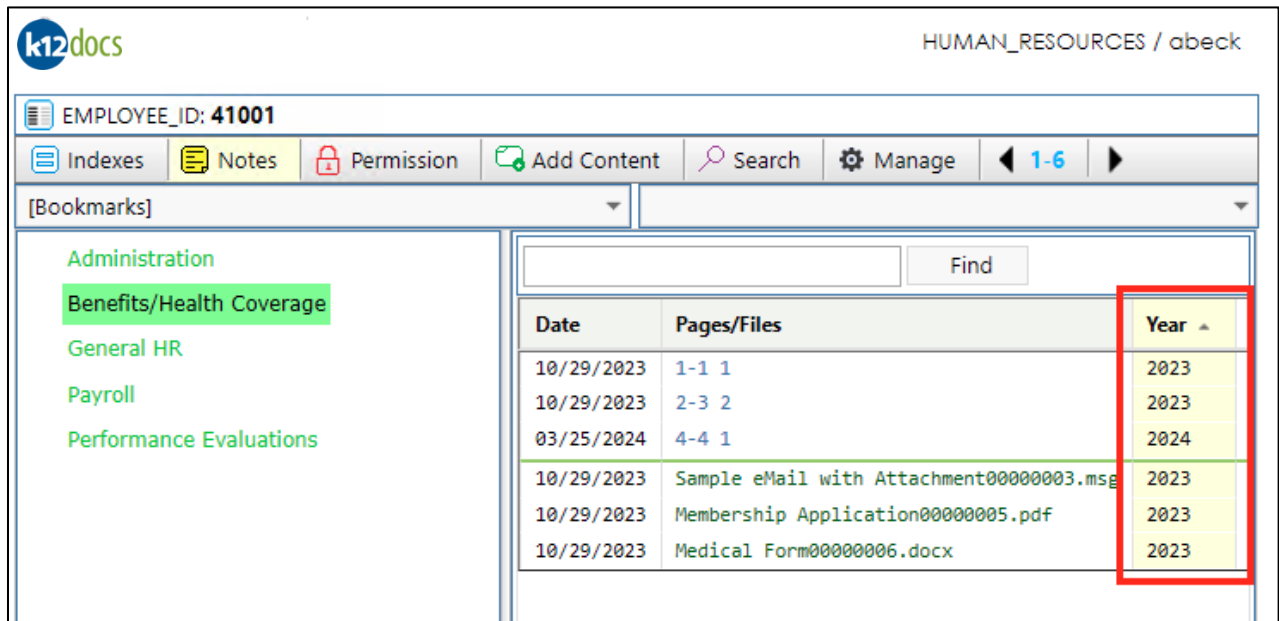
[Bookmarks]

Administration
Benefits/Health Coverage
General HR
Payroll
Performance Evaluations

Date	Pages/Files	Year	Ber
10/29/2023	1-2 2	2023	Med
10/29/2023	3-3 1	2023	
03/25/2024	4-4 1	2024	
10/29/2023	Medical Form00000006.docx	2023	Enr
10/29/2023	Membership Application00000005.pdf	2023	
10/29/2023	Sample eMail with Attachment00000003.msg	2023	

3. The document attribute column will now be sorted in ascending order.
4. If you want column to be sorted in descending order, select the column header again.

Note a) Scanned images and electronic files will sort separately.



EMPLOYEE_ID: 41001

Indexes Notes Permission Add Content Search Manage 1-6

[Bookmarks]

Administration
Benefits/Health Coverage
General HR
Payroll
Performance Evaluations

Date	Pages/Files	Year	Ber
10/29/2023	1-1 1	2023	
10/29/2023	2-3 2	2023	
03/25/2024	4-4 1	2024	
10/29/2023	Sample eMail with Attachment00000003.msg	2023	
10/29/2023	Membership Application00000005.pdf	2023	
10/29/2023	Medical Form00000006.docx	2023	

Exporting Search Results:

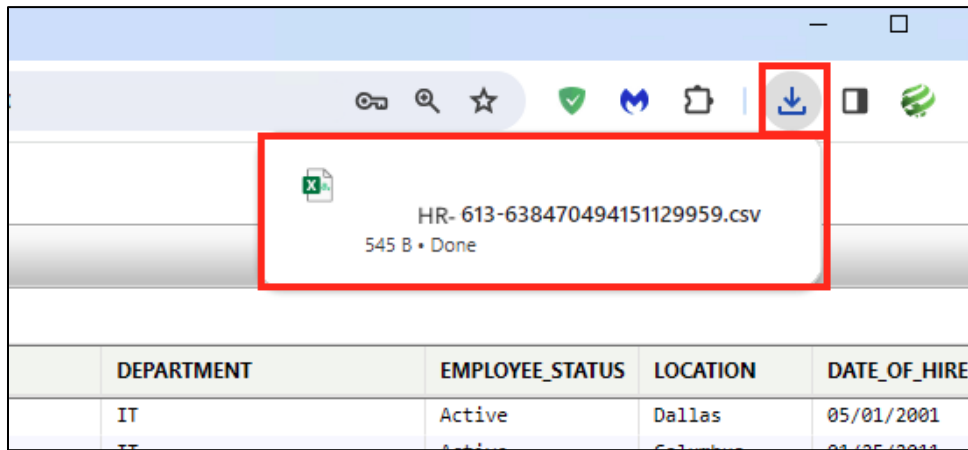
To export the search results, follow the steps listed below:

Steps:

1. Run a search for the search result values you want to export out of K12Docs.
2. Click on the **Export** button.

EMPLOYEE_ID	LAST_NAME	FIRST_NAME	SSN	DEPARTMENT	EMPLOYEE_STATUS	LOCATION	DATE_OF_HIRE
41000	Eckard	Michael	111-11-1111	IT	Active	Dallas	05/01/2001
41001	Ashford	Paulette	999-99-9999	IT	Active	Columbus	01/25/2011
41002	Powers	Jay	777-77-7777	Human Resources	Active	Columbus	03/20/1998
41108	Koons	Amanda	888-88-8888	Finance	Active	Chicago	06/10/2009

3. The search results will be download as a CSV file, which can be opened in Microsoft Excel for review/editing.

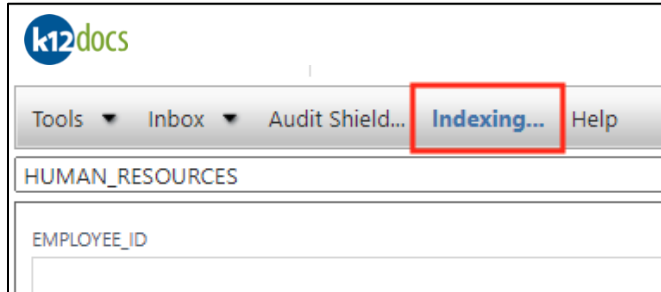


Indexing: Opening Document Indexing HUB

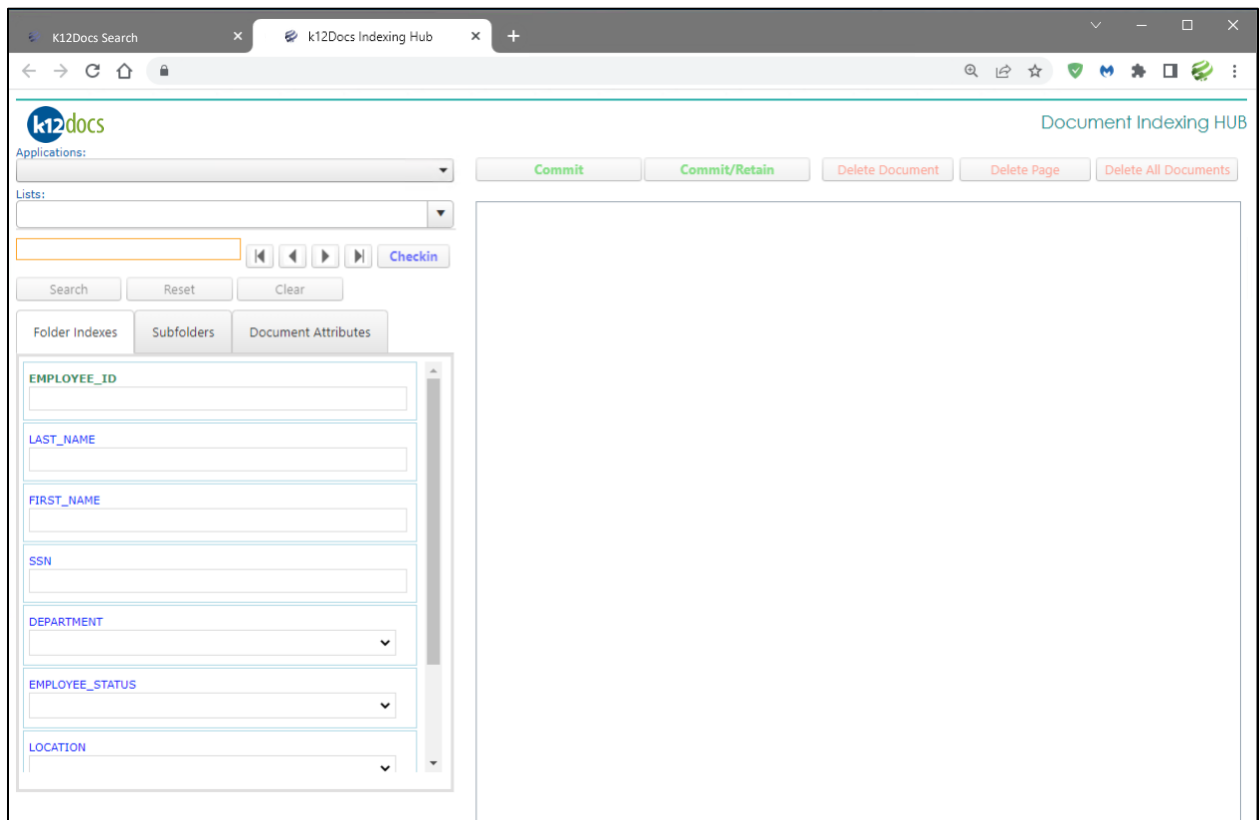
To open the Document Indexing Hub, follow the steps listed below:

Steps:

1. Select **Indexing...** button.



2. The **Document Indexing HUB** will open in a new browser tab.



Indexing: Indexing/Filing a Document

To index/file a document, follow the steps listed below:

Steps:

1. From the **Applications:** drop down menu, select the application want to index/file documents to.
2. From the **Lists:** drop down menu, select the indexing list that contains the documents you want to index/file.

The screenshot shows the k12docs interface. The 'Applications:' dropdown menu is set to 'HUMAN_RESOURCES' (indicated by red box 1). Below it, the 'Lists:' dropdown menu is open, showing a table of lists. The first list, 'abeck', is selected (indicated by red box 2).

ID	Name	Documents	Pages
4061	abeck	3	7
4062	jsmith	1	7
4063	jdoe	6	10

3. The documents for the selected indexing list will load below the **List:** drop down menu.
4. Select the document you want to index/file.
5. The images for the document will load to the right in the image viewer area.

The screenshot shows the k12docs interface with the 'abeck' list selected. Below the list, a table of documents is displayed. The first document, '1', is selected (indicated by red box 4). To the right, the 'Document Indexing HUB' is visible, showing the document 'VER. 2001 Application for Employment' (indicated by red box 5).

Document Id	Time In	Pages	FillData
1	6/7/2022 1:21:36 PM	2	
2	6/7/2022 1:21:36 PM	2	
3	6/7/2022 1:21:36 PM	3	

6. On the **Folder Indexes** tab, perform one of the following actions:

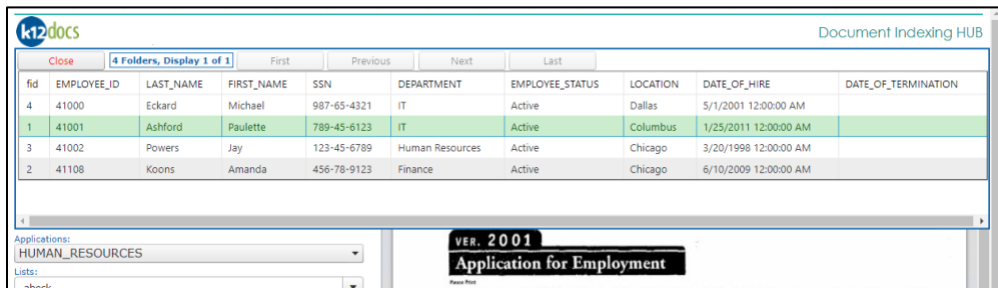
- a. **Creating a New Folder** – Enter the new folders details into the provided folder index fields.

OR


- b. **Adding to an Existing Folder** – Enter your search criteria for the existing folder into the provided folder index fields and select the **Search** button.

Note		A Wildcard search can be used in any of the Folder index fields. Below is a list of examples of how the Wildcard search works:	
<u>Symbol</u>	<u>Meaning</u>	<u>Example of Use</u>	<u>Example of Returned Results</u>
%	Wildcard	BO%	Bonnie Bob
		%NN%	Tenn nn essee Penn nn sylvania
		%34	500 34 AK12 34

1. If a **single** search result is found, the folders details will automatically populate into the folder index fields.
2. If **multiple** search results are found, A window will appear above, showing a list of folders to choose from. Select a folder and its details will auto populate into the folder index fields. To close the search results window, select the **Close** button.



- Note**
- a) To clear any values entered the folder index fields, select the **Clear** button.
 - b) To reset the default folder index field values, select the **Reset** button.



Applications:
 HUMAN_RESOURCES

Lists:
 abeck

Document Id	Time In	Pages	FillData
1	6/7/2022 1:21:36 PM	2	
2	6/7/2022 1:21:36 PM	2	
3	6/7/2022 1:21:36 PM	3	

3 Documents, Display 1 of 1
 << < > >> Checkin

Search Reset Clear

Folder Indexes Subfolders Document Attributes

EMPLOYEE_ID
 41001

LAST_NAME
 Ashford

FIRST_NAME
 Paulette

SSN
 789-45-6123

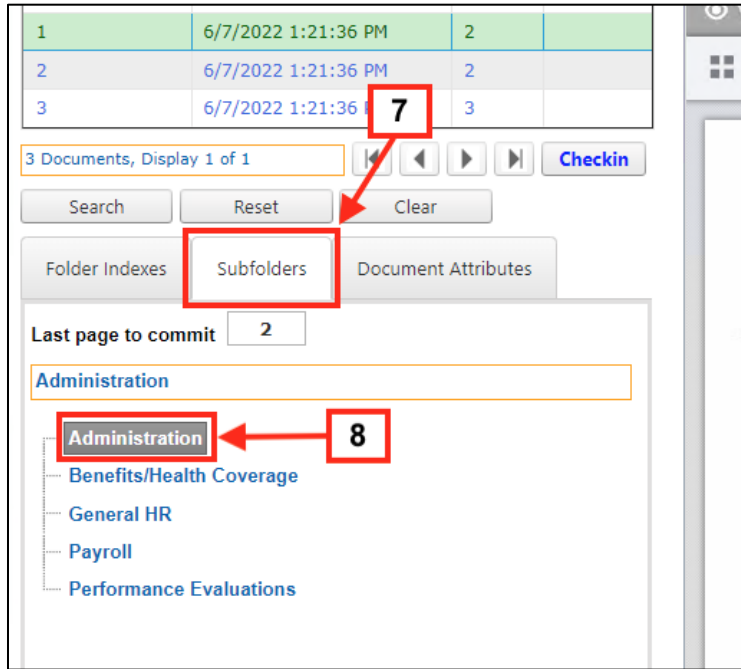
DEPARTMENT
 IT

EMPLOYEE_STATUS
 Active

LOCATION
 Columbus

6

7. If your application has Subfolders, select the **Subfolders** tab.
8. Select the subfolder you want to place your document into.



1	6/7/2022 1:21:36 PM	2	
2	6/7/2022 1:21:36 PM	2	
3	6/7/2022 1:21:36 PM	3	

3 Documents, Display 1 of 1

Search Reset Clear

Folder Indexes **Subfolders** Document Attributes

Last page to commit 2

Administration

Administration

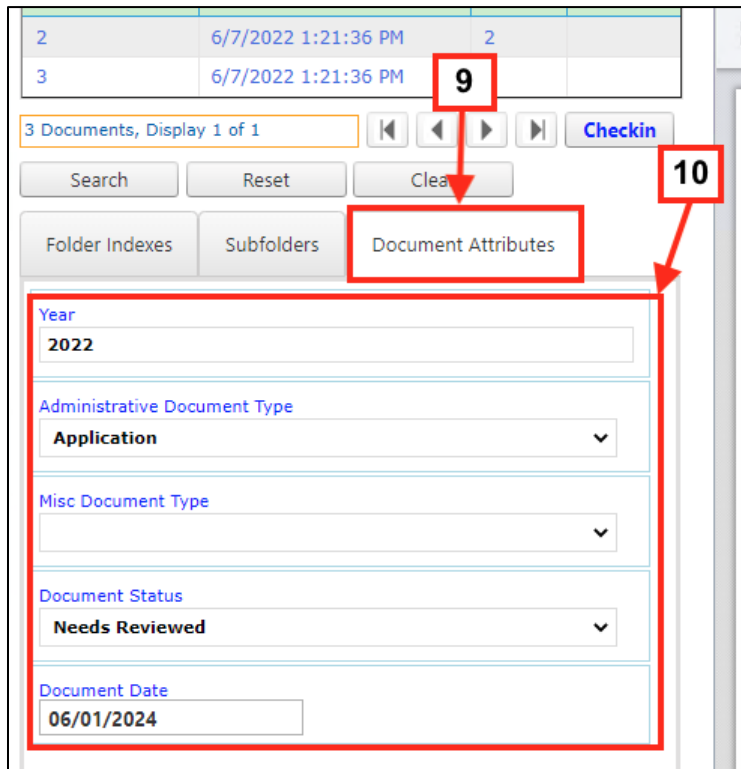
Benefits/Health Coverage

General HR

Payroll

Performance Evaluations

9. If your application has Document Attributes, select the **Document Attributes** tab.
10. Select/Enter the desired information into the provided document attribute fields



2	6/7/2022 1:21:36 PM	2	
3	6/7/2022 1:21:36 PM		

3 Documents, Display 1 of 1

Search Reset Clear

Folder Indexes Subfolders **Document Attributes**

Year

2022

Administrative Document Type

Application

Misc Document Type

Document Status

Needs Reviewed

Document Date

06/01/2024

11. Click on the **Commit** button to index/file the document.

Note:

- If you are indexing/filing a document to an existing folder, the commit button will say "Commit (append)"
- If you want to index/file a copy of the document out to a folder but keep the original document in the indexing list, select the **Commit/Retain** button.

The screenshot shows the k12docs Document Indexing HUB interface. On the left, there's a sidebar with 'Applications: HUMAN_RESOURCES' and a list of documents. A red box labeled '11' points to the 'Commit' button in the top right. The main area displays a preview of a document titled 'Application for Employment' with various fields filled out, including Name, Address, and Social Security number.

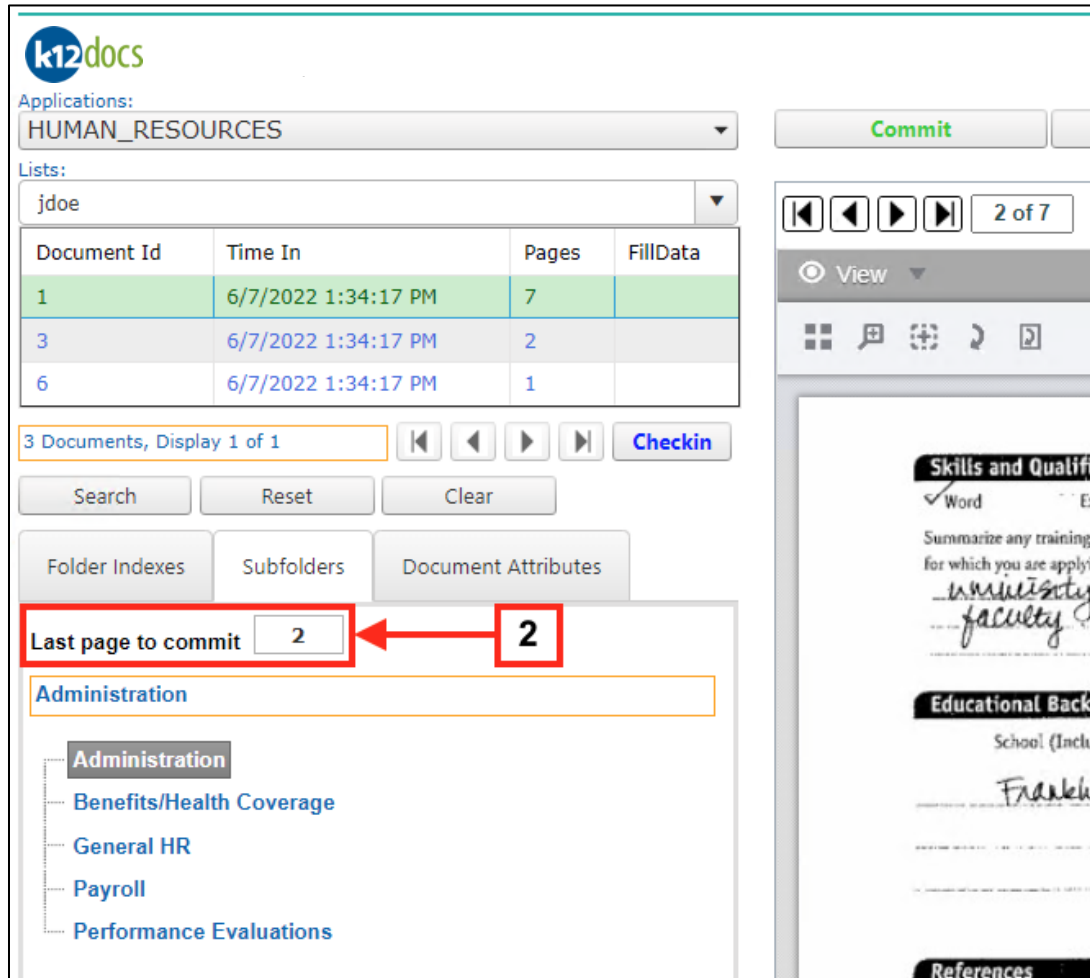
12. The document will now be indexed/filed and removed from the indexing list.

Indexing: Separating a Document from a Bulk Scan

To separate a document from a bulk scan, follow the steps listed below:

Steps:

1. Follow steps 1 through 8 from section “Indexing: Indexing/Filing a Document”.
2. On the Subfolder tab, in the **Last page to commit** box, enter the last page number for the document you want to separate from the bulk scan.
 - a. *Example: If the bulk scan is 100 pages, but you only want to index/file the first two pages, you would enter 2 into the “Last page to commit” box because 2 represents the last page of the two-page document.*



The screenshot shows the k12docs application interface. At the top, there's a header with the k12docs logo and navigation tabs: Applications, Lists, and Documents. The 'Applications' dropdown is set to 'HUMAN_RESOURCES'. The 'Lists' dropdown is set to 'jdoe'. Below this is a table with columns: Document Id, Time In, Pages, and FillData. The table contains three rows of data. Below the table, there's a summary bar showing '3 Documents, Display 1 of 1' and navigation buttons. Further down, there are tabs for 'Folder Indexes', 'Subfolders', and 'Document Attributes'. The 'Subfolders' tab is active, showing a list of subfolders: Administration, Benefits/Health Coverage, General HR, Payroll, and Performance Evaluations. The 'Administration' subfolder is selected. In the 'Last page to commit' field, the number '2' is entered. A red box highlights this field, and a red arrow points to it from a '2' in another box. On the right side, there's a document preview showing a resume with sections like 'Skills and Qualifications', 'Educational Background', and 'References'.

Document Id	Time In	Pages	FillData
1	6/7/2022 1:34:17 PM	7	
3	6/7/2022 1:34:17 PM	2	
6	6/7/2022 1:34:17 PM	1	

3 Documents, Display 1 of 1

Search Reset Clear

Folder Indexes Subfolders Document Attributes

Last page to commit 2

Administration

- Administration
- Benefits/Health Coverage
- General HR
- Payroll
- Performance Evaluations

Skills and Qualifications

Word

Summarize any training, for which you are applying for.

University faculty

Educational Background

School (Include)

Franklin

References

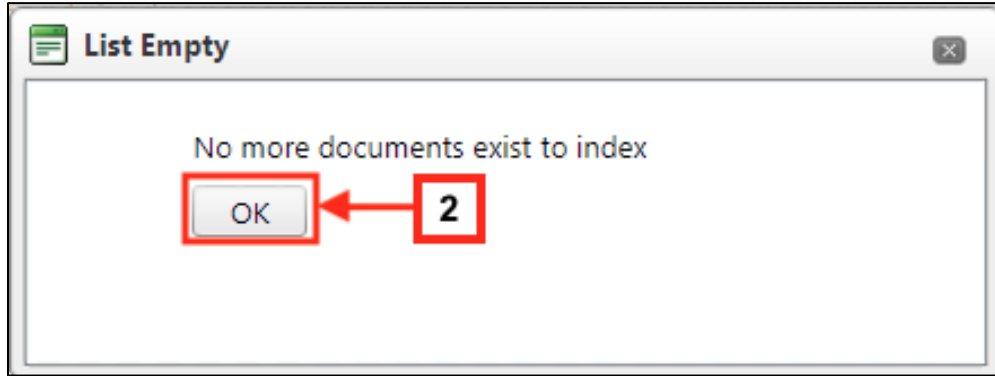
3. Follow steps 9 through 12 from section “Indexing: Indexing/Filing a Document” to finish indexing/filing the separated document.

Indexing: Empty Indexing List After All Documents Indexed/Filed

Follow the steps below showing how to handle empty indexing lists after all of the documents have been indexed/filed:

Steps:

1. Once all documents are indexed/filed from an indexing list, a **List Empty** window will pop up.
2. Click on the **OK** button to close the window and check your indexing list back in.

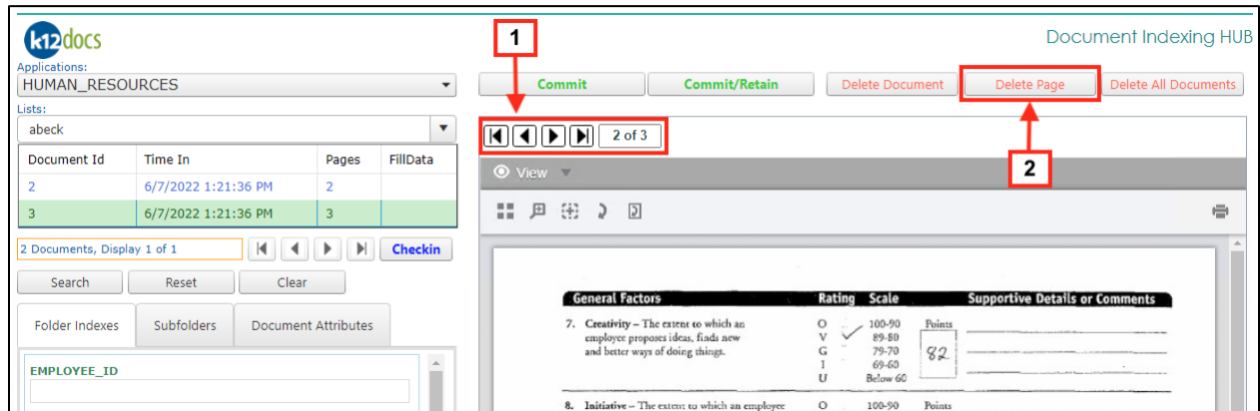


Indexing: Deleting a Page

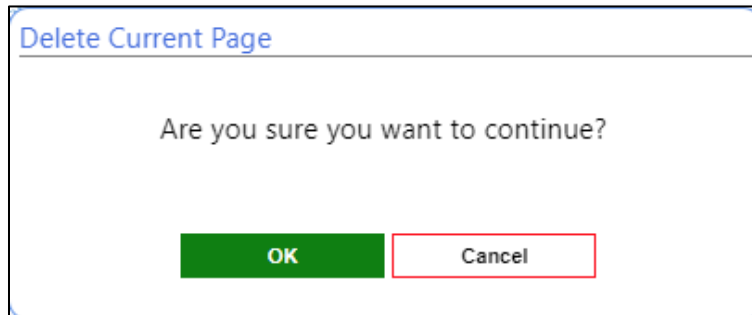
To delete a page during the indexing review process, follow the steps listed below:

Steps:

1. Navigate to the page you want to delete using the navigation buttons.
2. Select the **Delete Page** button.



3. A confirmation message will pop up, click the **OK** button.



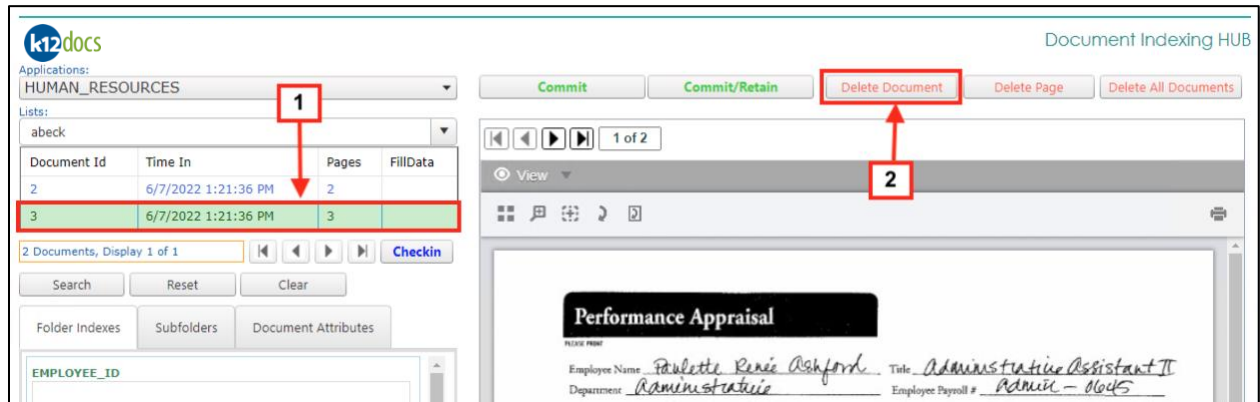
4. The page will now be deleted.

Indexing: Deleting a Document

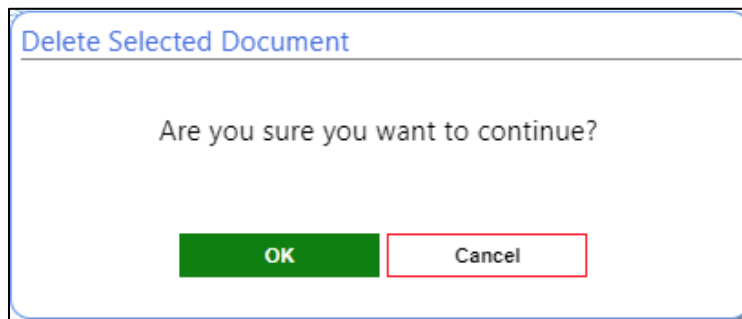
To delete a document during the indexing review process, follow the steps listed below:

Steps:

1. Select the document you want to delete.
2. Select the **Delete Document** button.



3. A confirmation message will pop up, click the **OK** button.



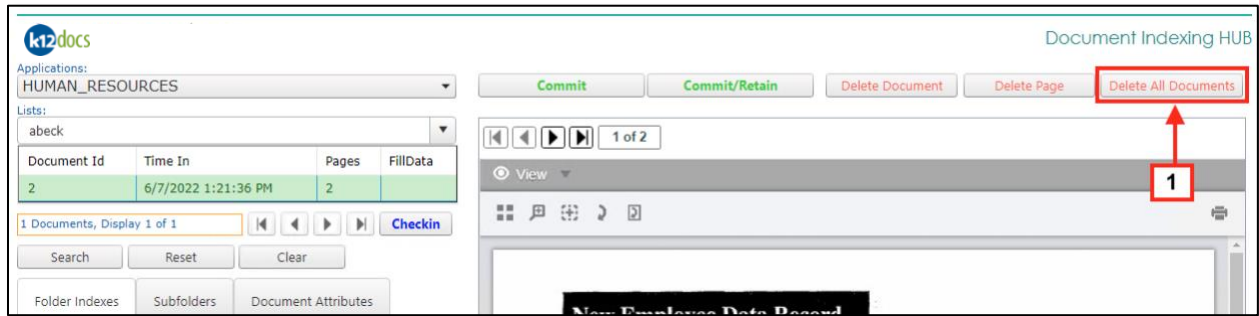
4. The document will now be deleted.

Indexing: Deleting All Checked-Out Documents in Indexing List

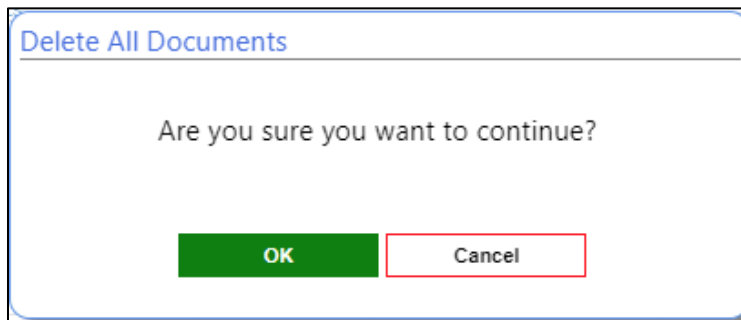
To delete all of the checked-out documents form an indexing list during the indexing review process, follow the steps listed below:

Steps:

1. Select the **Delete All Documents** button.



2. A confirmation message will pop up, click the **OK** button.



3. All documents will now be deleted.
4. A **List Empty** window will pop up.
5. Click on the **OK** button to close the window and check your indexing list back in.

