

Indexing Documents from Lists in K12Docs (Used with Batch Scanning)

Indexing and Filing Documents from Lists:

Note: When scanning a batch of documents to an indexing list, be sure to scan as .TIFF files in order to be able to index and file the individual pages separately; or else the indexing list must be defined (in Host Site Manager) with the Convert Inbound Files to Image Pages field enabled for virtual files.

1. At the top of the main screen in K12Docs, click the **Indexing** button to access the documents that were scanned in batches to indexing lists. See **Diagram A**.
2. On the K12Docs Indexing Hub screen (tab), click the **down-arrow** button for the Applications field and select the application for which to index and file documents. See **Diagram B**.
3. Click the **down-arrow** button for the Lists field and select the indexing list containing the documents to be indexed and filed.

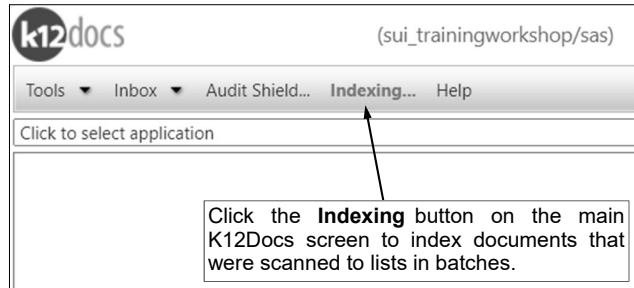


Diagram A

Note: Only the indexing lists (including the default scan lists and any custom indexing lists if applicable) for which the user has rights that contain batches of documents waiting to be indexed and filed for the selected application appear in the drop-down list.

Tip: The number of batches, along with the total number of pages, waiting to be indexed and filed for an indexing list display. If there are no indexing lists with batches of documents waiting to be indexed and filed, **No Lists Found** displays in the drop-down list.

4. The batches of documents that were scanned to the selected indexing list and are available to be indexed and filed display under the Lists field. For each batch, an ID, the date and time the batch was scanned (added) to the list, and the total number of pages in the batch are shown. (**Tip:** If a batch of documents was scanned as a virtual file type (including .PDF or .DOC file types), an asterisk appears to the right of the number of pages, and the number of pages reflects the number of virtual files (documents) in the batch rather than the total number of actual pages.)
Tip: If needed, use the navigation buttons located under the list of batches to advance through the list if there are multiple pages.
5. Select the batch of documents to index and file by clicking once on the desired row.

Note: The preview of the first page in the selected batch of documents will appear on the right side of the screen; use the navigation buttons located in the upper left corner of the preview screen to scroll through and view the different pages of documents within the selected batch.

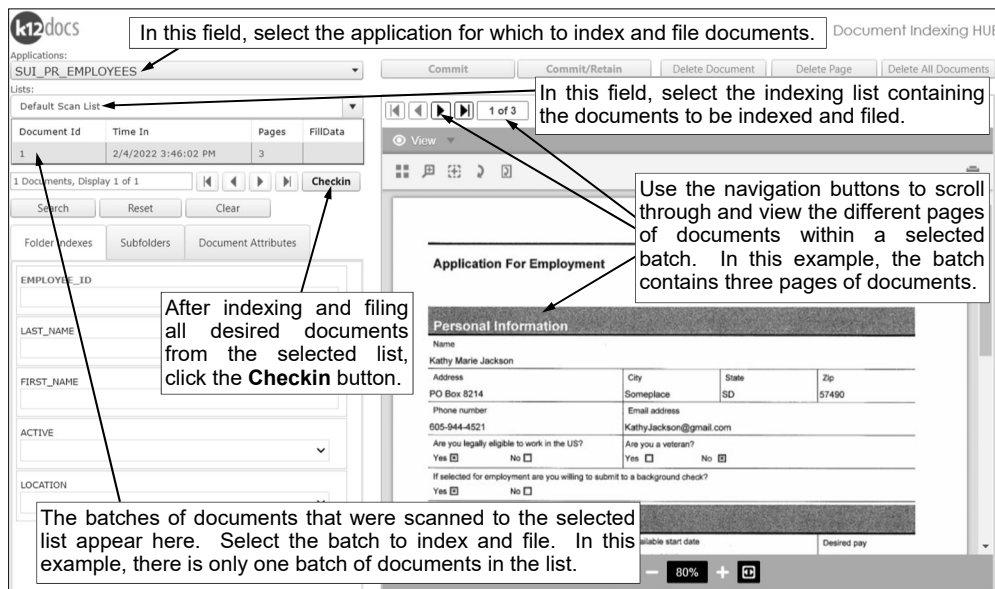


Diagram B

6. Complete the process to index and file the desired page(s) of the selected batch as follows:
Tip: When indexing and filing a document, complete the tabs from left to right on the screen to be sure all sections are completed.

a. On the Folder Indexes tab (see **Diagram C**), all the index fields for the specified application appear in order to search for and select the desired folder in which to add (file) the document.

Searching for a folder:

- Enter the criteria on which to search in the applicable index fields, or if applicable, click the **down-arrow** button to select the correct criteria for a particular index field. Leave all the index fields blank to view all the folders in the application.

Tip: If desired, use a wildcard character in your variable search information for the indexes; for example, use the percent sign (%) as a placeholder for an unlimited number of characters.

- Click the **Search** button located above the Folder Indexes tab, or press the **Enter** key.
- If there is only one folder that matches the specified criteria, the particular folder will automatically be selected and the applicable information will be populated in the appropriate folder index fields. See **Diagram D**.
- If there are multiple folders that match the specified criteria, the search results list will appear at the top of the screen (above the Applications field) showing all the folders matching the specified criteria. Select the correct folder in which to file the document by clicking on it once; the applicable information will then be populated in the appropriate folder index fields. Then click the **Close** button located at the top of the search results list.

Tip: If needed, use the navigation buttons located above the search results list to advance through the list if there are multiple pages.

The screenshot displays the k12docs Document Indexing HUB interface. At the top, there are navigation buttons: Close, 2 Folders, Display 1 of 1, First, Previous, Next, and Last. Below these is a table of search results:

fid	EMPLOYEE_ID	LAST_NAME	FIRST NAME	ACTIVE	LOCATION
1195	JACKSKATH	Jackson	Kathy	Yes	
4230	JACKWARRE	Jackson	Warren	Yes	

Annotations on the screenshot include:

- A box pointing to the search results table: "If there are multiple folders that match the specified criteria, the search results display here. Select the correct folder in which to file the document and then click the **Close** button."
- A box pointing to the navigation buttons: "If there are multiple pages of results, use the navigation buttons to scroll through and see all the results."
- Annotations pointing to the search criteria fields: "Complete the folder indexes for the folder in which to file the document and then click the **Search** button. If desired, wildcard characters can be used in the variable search information, as shown in this example." (with an example of "JA%").
- Annotations pointing to the application-specific fields: "Remember, the folder index fields that appear here vary depending on the selected application. In this example, the folder index fields appear for the SUI_PR_Employees application."

The interface also shows an "Applications" dropdown set to "SUI_PR_EMPLOYEES", a "Lists" dropdown set to "Default Scan List", and a table of document batches:

Document Id	Time In	Pages	FillData
1	2/4/2022 3:46:02 PM	3	

Below this is a "Folder Indexes" section with input fields for EMPLOYEE_ID, LAST_NAME (containing "JA%"), FIRST_NAME, ACTIVE, and LOCATION. A "Search" button is located to the right of these fields.

The right side of the interface shows an "Application For Employment" form for "Kathy Marie Jackson". The form includes sections for Personal Information, Address, Phone number, Email address, and background check information.

Diagram C

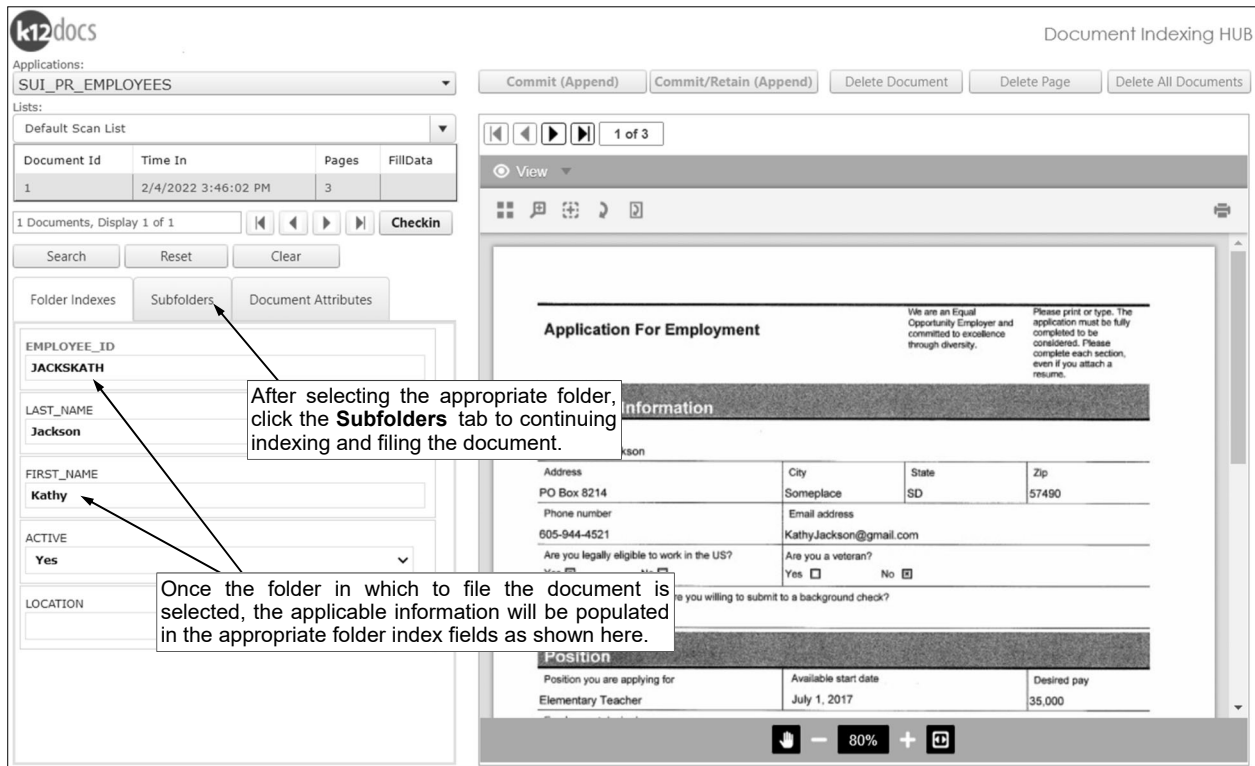


Diagram D

b. Click the **Subfolders** tab and complete the necessary information. See **Diagram E**.

- In the Last Page to Commit field, enter the number of the last page to index and file from the selected batch; for example, to index and file only the first page of the batch, enter **1** in this field, or to index and file the first two pages of the batch, enter **2**. By default, the last page number in the batch will appear but can be changed.

Tip: If needed, to delete a page from the batch of documents because it does not need to be indexed and filed, select to preview the appropriate page and then click the **Delete Page** button (located above the preview screen); and when prompted, click **OK** to continue deleting the page.

Note: The Last Page to Commit field only appears when indexing and filing batches that are .TIFF files; the field does not appear for virtual file batches (including .PDF or .DOC file types). If indexing and filing a virtual file batch, which is not recommended, all the pages from the first virtual file will be indexed and filed together as one document, while any additional virtual files in the batch (if applicable) will be removed. For example, if two .PDF files were scanned (or added) as one batch, only the first file will actually be indexed and filed and the second one will be removed.

- All the subfolders for the designated application for which the user has rights appear in the subfolders list. Select the subfolder for which to add (file) the document by clicking once on the subfolder name. The name of the selected subfolder will appear above the subfolders list, in addition to the selected subfolder being outlined in a shaded box within the list. If

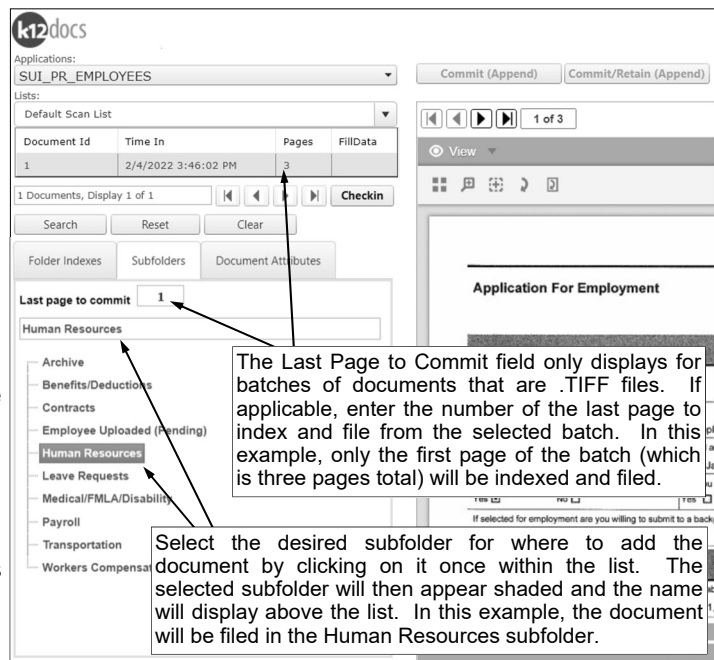


Diagram E

there is only one subfolder defined within the specified application, the one subfolder will be selected automatically.

c. Click the **Document Attributes** tab and complete the attributes for the document as desired. See **Diagram F**.

- Enter a description (up to **100** characters) for the document in the Document Description field.
- Enter the date of the document in the Document Date field. Use the **mm/dd/yyyy** format.
- Complete any additional attribute fields by entering the appropriate information or clicking the **down-arrow** button to select the correct information for a particular attribute field, if applicable.

Note: Depending on the subfolder selected for the designated application, different attribute fields display when adding a document.

d. To file the document as specified, click the **Commit** button (or **Commit (Append)** button) located above the preview screen, or else click the **Commit/Retain** button (or **Commit/Retain (Append)** button) to file the document as specified while also retaining the values for the folder indexes to use with indexing and filing the next document.

Tip: The **Commit** button and the **Commit/Retain** button display if the specified folder has not yet been created, while the **Commit (Append)** button and the **Commit/Retain (Append)** button display if the specified folder already exists.

7. Repeat Steps 5 and 6 until all the desired documents have been indexed and filed from the selected list.

Tip: If needed, to delete a batch of documents from the list because it does not need to be indexed and filed, select the batch and then click the **Delete Document** button (located above the preview screen), or to delete all the batches in the selected list, click the **Delete All Documents** button; and when prompted, click **OK** to continue deleting.

8. When finished indexing and filing all the desired documents from the selected list, click the **Checkin** button.

The screenshot displays the k12docs Document Indexing HUB interface. On the left, a 'Documents' list shows one document with ID 1, scanned on 2/4/2022 at 3:46:02 PM, with 3 pages. Below the list are search and filter options. The 'Document Attributes' tab is active, showing fields for Document Description ('Kathy Jackson Teacher Application'), Document Date ('06/20/2021'), Created By, Human Resources Document Type ('Employment Application'), Expiration Date, and Document Status ('Reviewed'). On the right, the document preview shows a form for 'Application For Employment' with fields for contact information, address, and employment details. At the top of the preview area, buttons for 'Commit (Append)', 'Commit/Retain (Append)', 'Delete Document', 'Delete Page', and 'Delete All Documents' are visible. A 'Checkin' button is located at the bottom of the document list. Several callout boxes provide instructions: one points to the 'Checkin' button, another to the 'Document Attributes' tab, a third to the 'Commit (Append)' and 'Commit/Retain (Append)' buttons, and a fourth to the document attribute fields.

After indexing and filing all desired documents from the selected list, click the **Checkin** button.

Click the **Document Attributes** tab to continue indexing and filing the document.

Complete the document attributes as desired.

To file the document, click the **Commit (Append)** button, or else to file the document and retain the values for the folder indexes, click the **Commit/Retain (Append)** button.

Remember, the document attribute fields that appear here vary depending on the selected subfolder for where the document will be filed. In this example, the document attribute fields appear for the Human Resources subfolder within the SUI_PR_Employees application.

Diagram F