Search Activity Workflows

The search activity features in GX are used to create workflows to have users review documents; for example, a search activity can be created to review documents that have expired or are going to be expiring soon. The search activity features can also be used to create advanced searches; for example, a search activity can be created to search for all documents with a date in a certain date range, or to view the employees with a teacher contract that is not signed.

The search activity workflows are defined in GX. Within GX, use the **Search Activity Editor** button to create a new a search activity workflow, and use the **Search Activity Catalog** button to view, generate, add, change, or delete a search activity workflow. A search activity workflow can be defined to allow all users to generate the workflow in GX or just the user who created it, and be defined to allow certain users (or roles of users) to access and generate the workflow using the Inbox option in K12Docs and GX. A search activity workflow can also be defined to send email notifications, if desired.

Adding a Workflow in GX:

1. On the main screen in GX, click the **Search Activity Catalog** button. See **Diagram A**.

    Note: A new workflow can also be added by first selecting the desired application to work with on the main screen of GX and then clicking the **Search Activity Editor** button.

2. At the Search Activity Manager screen, click the **New** button.

3. The Search Activity Builder screen appears. See **Diagram B**.

4. Complete the fields and make the necessary selections for the new search activity workflow:

    a. In the Applications field, click the **down-arrow** button and select the application in which to create the workflow.

    b. Select the desired field or option to use in the criteria for the workflow by clicking on the item once from the list on the left side of the screen.

      Tip: The available fields to use for the specified application display on the left side of the screen, with the folder index fields shaded in blue; the document attribute fields shaded in purple; the other items, including subfolders, notes, and system fields, shaded in green; the Fulltext option shaded in turquoise, and the Folder Adhoc option, which is an advanced option and only used if instructed by Intellinetics, shaded in gray.

    c. After selecting a field or option, the field appears on the right side of the screen. Finish making the appropriate selections to the field for the criteria to use for the workflow.

      • For drop-down fields added to the criteria, click the **down-arrow** button under the field name and select the value(s) that must equal the criteria selection to be included in the workflow. If needed, select the Not Equals One or More field to instead have the selected value(s) <u>not</u> equal the criteria selection to be included in the workflow.

        Tip: To remove the field from the criteria selection, click the **Remove (-)** button in the upper right corner of the field's section.
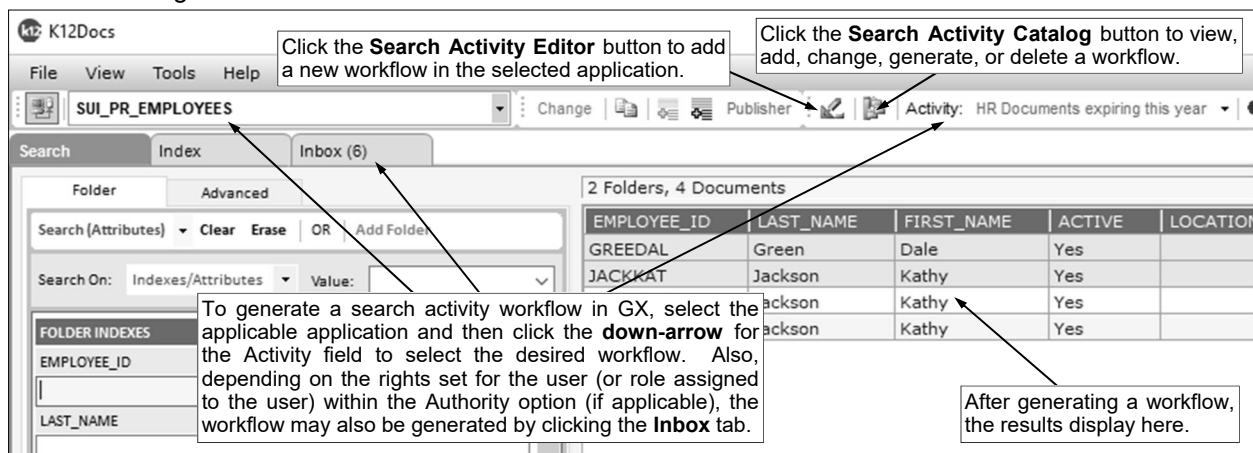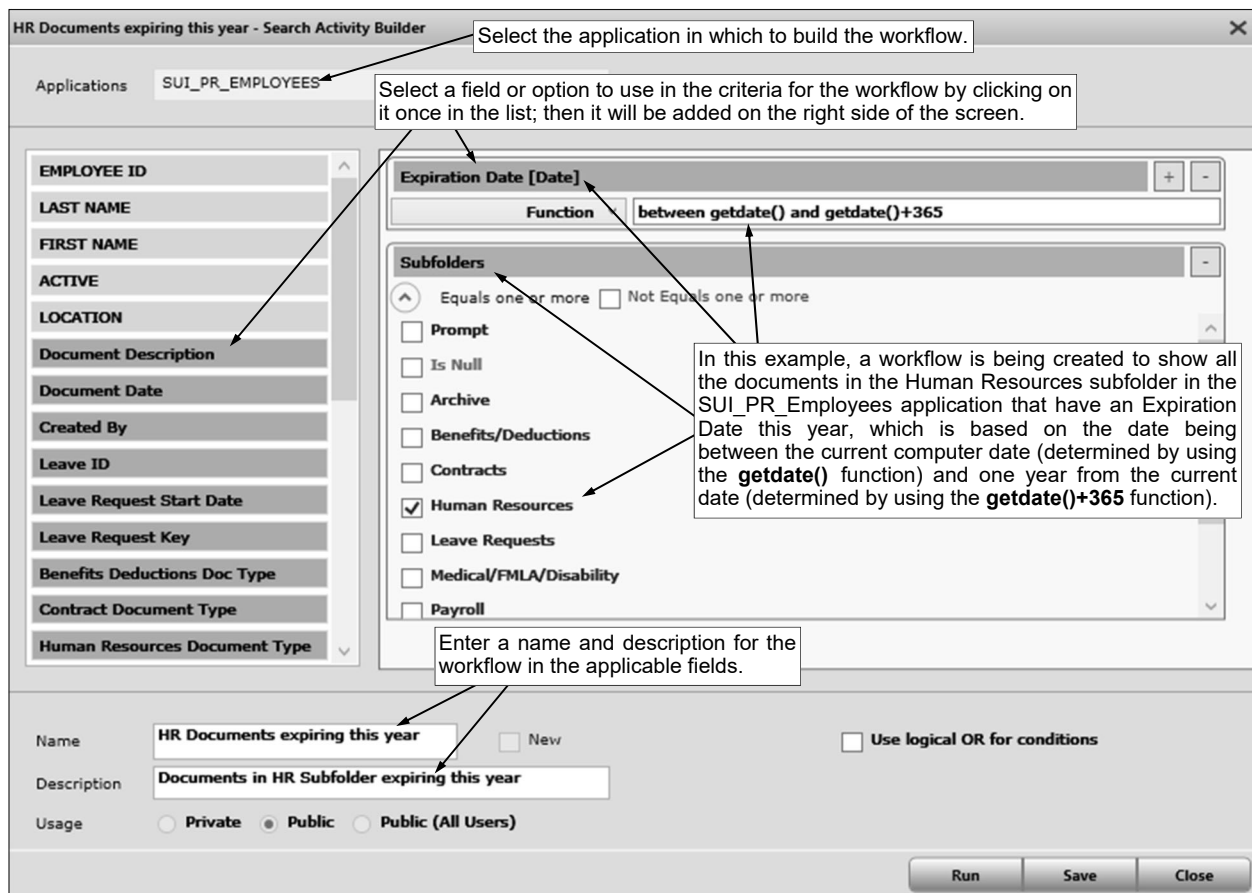

Diagram A

Diagram B

- For other fields (those that are <u>not</u> drop-down fields) added to the criteria, click the **down-arrow** button to select the applicable operator (**Equal**, **Not Equal**, **Less Than**, **Less Than or Equal**, **Greater Than**, **Greater Than or Equal**, **Like**, **Not Like**, **Between**, **Not Between**, **In**, **Not In**, **Is Null**, **Is Not Null**, **Function**, or **Remove**) and then enter the desired value. If needed, use wildcard characters as a placeholder in your variable search information when entering a value; for example, use the percent sign (**%**) is a placeholder for an unlimited number of characters.

    Note: To be prompted for a value or information when generating the search activity workflow, enter **?** as the value. Keep in mind, any search activity workflows that include prompts (**?** as values) will <u>not</u> be accessible in K12Docs and must be generated in GX, and also <u>cannot</u> have email notifications sent.

    Tip: To add an additional condition for the same field, click the **Add** (**+**) button in the upper right corner of the field's section, or to remove the field from the criteria selection, click the **Remove** (**-**) button in the upper right corner of the field's section.

  d. Repeat Steps b and c until all the fields and criteria selections have been added.

  e. Enter a unique name for the new search activity workflow in the Name field. The name can be alphanumeric and up to **50** characters long.

  f. If desired, enter a longer description for the search activity workflow in the Description field. The description can be up to **256** characters long.

  g. For the Usage field, select the appropriate option (**Private**, **Public**, or **Public (All Users)**) for who can generate and edit the search activity workflow. Select **Private** to have the search activity workflow available under the Activity drop-down field in GX for only the user who created the workflow (will <u>not</u> be available within the Inbox option in GX or K12Docs), and also able to be edited in GX by only the user who created it. Select **Public** to have the search activity workflow available under the Activity drop-down field in GX and in the Inbox option in GX or K12Docs for the designated users (or roles of users) as specified within the Authority section of the workflow, and also able to edited in GX by all users. Select **Public (All Users)** to have the search activity workflow available under the Activity drop-down field in GX for all users, available in the Inbox option in GX or K12Docs for only the designed users (or roles of users) as specified within the Authority section for a workflow, and also able to be edited in GX by all users.
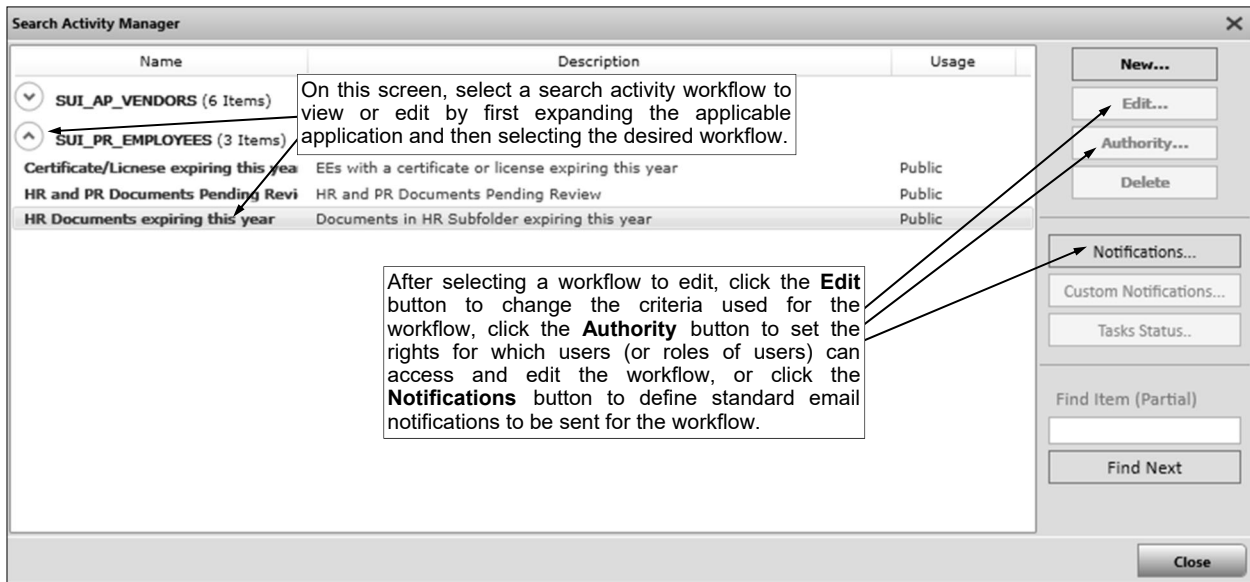
On this screen, select a search activity workflow to view or edit by first expanding the applicable application and then selecting the desired workflow.

After selecting a workflow to edit, click the **Edit** button to change the criteria used for the workflow, click the **Authority** button to set the rights for which users (or roles of users) can access and edit the workflow, or click the **Notifications** button to define standard email notifications to be sent for the workflow.

Diagram C

    Note: Once a search activity workflow is saved, the Usage field <u>cannot</u> be changed. Also, email notifications <u>cannot</u> be defined for a search activity workflow with the Usage of **Private**.

  h. If desired, select the Use Logical OR for Conditions field to have the system use the OR operator between the criteria selections for the different fields or options listed, instead of the AND operator. A checkmark will appear in the box if the field is selected. If the field is selected, a record will only have to meet one of the conditions listed in order to be included in the results; whereas, if the field is <u>not</u> selected, a record will have to meet all the conditions in order to be included in the results.

5. Click the **Save** button.

    Tip: If desired, click the **Run** button to generate the workflow and view the results at this time.

6. For search activity workflows with the Usage of **Public** or **Public (All Users)**, complete the Authority section at this time, in order to set the rights for which users (or roles of users) can access the workflow in the Inbox option in GX and K12Docs, and have the workflow available under the Activity drop-down field in GX.

  a. At the Search Activity Manager screen, click the **down-arrow** to the left of the applicable application in which the new workflow was created and select the newly created workflow by clicking on it once; then click the **Authority** button. See **Diagram C**.

  b. The Search Activity Authority screen will display. See **Diagram D**.

  c. In the Roles/Users section, click to expand Roles or Users and then select the desired role or user for which to give rights for the workflow.

  d. In the Options section, select the applicable rights (**Enabled** and **Inbox**) to give to the specified user or role. Select **Enabled** to have the workflow display under the Activity drop-down field in GX for the specified user or role. Select **Inbox** to display the workflow in the Inbox option in GX and K12Docs for the specified user or role (**Important:** If **Inbox** is selected, **Enabled** must also be selected.). A checkmark will appear in the box if an option is selected.

    Note: The **Enabled** option is <u>not</u> applicable for search activity workflows with the Usage of **Public (All Users)**, as the workflow will automatically be available under the Activity drop-down
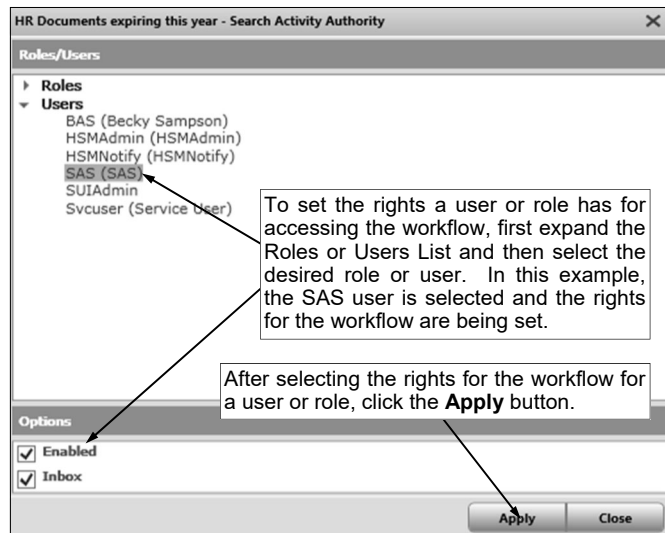

To set the rights a user or role has for accessing the workflow, first expand the Roles or Users List and then select the desired role or user. In this example, the SAS user is selected and the rights for the workflow are being set.

After selecting the rights for the workflow for a user or role, click the **Apply** button.

Diagram D

field in GX for all users no matter if the option is selected or not. Also, the **Inbox** option is <u>not</u> applicable and will be disabled for search activity workflows that prompt for one or more values.

 e. Click the **Apply** button.

 f. Repeat Steps c through e until the rights have been set for all the desired users and roles.

 g. Click the **Close** button.

7. For search activity workflows with the Usage of **Public** or **Public (All Users)**, complete the Notifications section at this time to define a standard email notification to be sent for the workflow, if desired.

 Note: A search activity workflow that prompts for one or more values <u>cannot</u> be defined to send email notifications.

 Tip: The standard email notification messages sent for a workflow use a subject line of "K12Docs Activity Notification", with the body of the message stating: "You have documents requiring review in K12Docs", along with noting the application, the name of the workflow, and the count of documents or folders matching the results of the workflow. The messages are sent from the email address of IvueServices@intellinetics.com.

 a. At the Search Activity Manager screen, click the **down-arrow** to the left of the applicable application in which the new workflow was created and select the newly created workflow by clicking on it once; then click the **Notifications** button. See **Diagram C**.

 b. The Workflow Notify Recipients screen will display. See **Diagram E**.

 c. In the Notify Cycle - Timeout Duration field, enter the number of minutes for how often to send the email notification for the workflow. The number entered in the Notify Cycle - Timeout Duration field is used within the designated constraints for when the email notification service runs, which by default is 8 a.m. to 5 p.m. Central Time, Monday through Friday. For example, to send the email notification for the workflow every hour (within the 8 a.m. to 5 p.m. Central Time constraints), enter **60** in this field; or to send the email notification for the workflow only once per day (within the 8 a.m. to 5 p.m. Central Time constraints), enter **550** in this field.
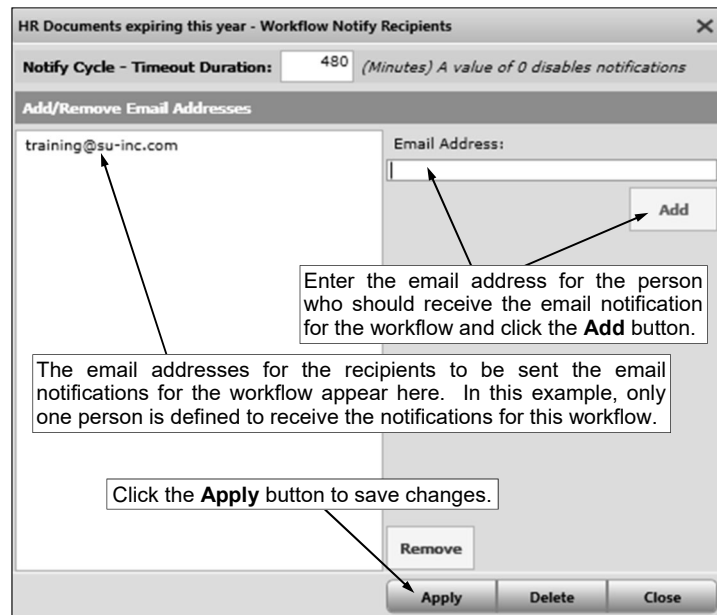

Diagram E

 Note: If zero (**0**) is entered in this field, email notifications will <u>not</u> be sent for the workflow.

 d. Enter the email address for the person to receive the email notification for the workflow in the Email Address field; then click the **Add** button.

 Tip: To remove an email address so a person does <u>not</u> receive the email notifications for the workflow, click once on the desired email address in the Add/Remove Email Addresses List and then click the **Remove** button.

 e. Repeat Step d until all the desired email addresses have been added.

 f. Click the **Apply** button.

<u>**Changing a Workflow in GX:**</u>

1. On the main screen in GX, click the **Search Activity Catalog** button.

2. At the Search Activity Manager screen, click the **down-arrow** to the left of the applicable application which contains the workflow to edit and select the correct workflow by clicking on it once; then click the **Edit** button.

3. The Search Activity Builder screen appears for the selected search activity workflow.

4. Make the desired changes to the search activity workflow.

    a. To add a new field to the criteria selection for the workflow, select the desired field or option by clicking on the item once from the list on the left side of the screen; then finish making the appropriate selections to the field for the criteria to use for the workflow.

    b. To remove a field from the criteria selection, click the **Remove** (**-**) button in the upper right corner of the field's section.

    c. To add an additional condition for a field that was previously included in the workflow, click the **Add** (**+**) button in the upper right corner of the field's section.

    d. To remove a condition for a field (typically used if multiple conditions are listed for a field), click the **down-arrow** button for the operator and select **Remove**.

5. Click the **Save** button to save the changes.

    Tip: If desired, click the **Run** button to generate the workflow and view the results at this time.

6. To change the rights for which users (or roles of users) can access the workflow in the Inbox option in GX and K12Docs, and have the workflow available under the Activity drop-down field in GX, edit the Authority section.

    Note: The Authority section is only applicable for search activity workflows with the Usage of **Public** or **Public (All Users)**.

    a. At the Search Activity Manager screen, click the **down-arrow** to the left of the applicable application which contains the workflow to edit and select the correct workflow by clicking on it once; then click the **Authority** button.

    b. Make the desired changes.

    c. Click the **Apply** button to save the changes.

    d. Click the **Close** button.

7. To change the settings for the standard email notifications for the workflow, edit the Notifications section.

    Note: The Notifications section is only applicable for search activity workflows with the Usage of **Public** or **Public (All Users)**, and do <u>not</u> prompt for one or more values.
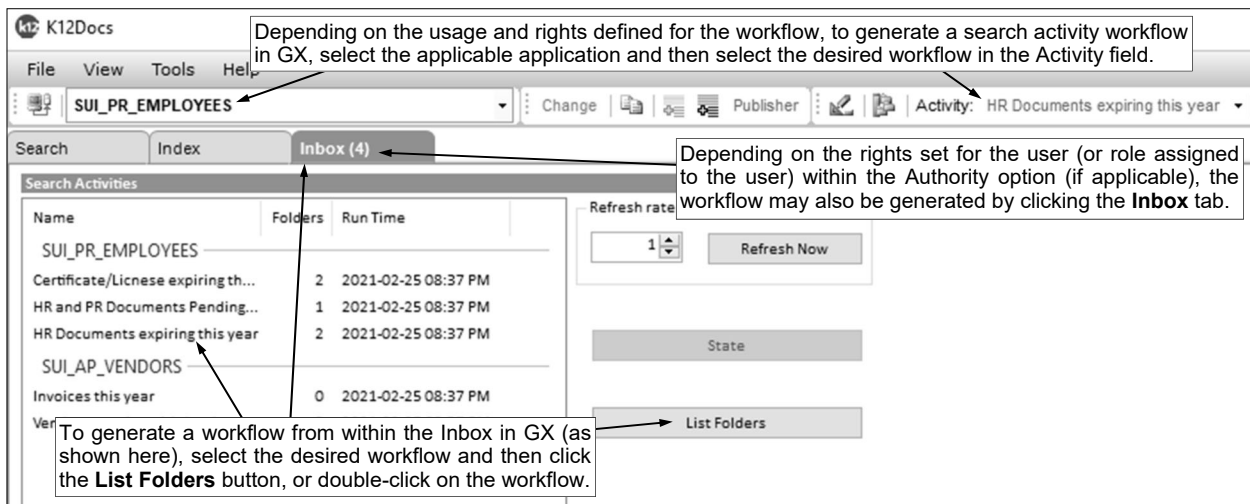
    a. At the Search Activity Manager screen, click the **down-arrow** to the left of the applicable application which contains the workflow to edit and select the correct workflow by clicking on it once; then click the **Notifications** button.

    b. Make the desired changes.

    -   To remove an email address so a person does <u>not</u> receive the email notifications for the workflow, click once on the desired email address in the Add/Remove Email Addresses List and then click the **Remove** button.

    -   To remove all the email addresses and clear the Notify Cycle - Timeout Duration field so notification emails are no longer sent for the workflow, click the **Delete** button at bottom of the screen.

    c. If changes were made, click the **Apply** button to save the changes.

Deleting a Workflow in GX:
1. On the main screen in GX, click the **Search Activity Catalog** button.
2. At the Search Activity Manager screen, click the **down-arrow** to the left of the applicable application which contains the workflow to delete and select the correct workflow by clicking on it once; then click the **Delete** button.
3. When prompted to delete the workflow, click **Yes**.

Generating a Workflow in GX:
1. A workflow can be generated from within GX in three different ways, depending on the Usage defined for the workflow and the rights set for the user (or role assigned to the user) within the Authority option (if applicable). Complete <u>one</u> of the following as applicable:

    a. On the main screen in GX, select the applicable application which includes the workflow to generate by clicking the **down-arrow** button for the Application field and choosing the correct

K12Docs

File   View   Tools   Help

SUI_PR_EMPLOYEES ▼ | Change | 📋 | 📑 📑 | Publisher | 🖍 | 📑 | Activity: HR Documents expiring this year ▼

Depending on the usage and rights defined for the workflow, to generate a search activity workflow in GX, select the applicable application and then select the desired workflow in the Activity field.

Search   Index   Inbox (4)

Depending on the rights set for the user (or role assigned to the user) within the Authority option (if applicable), the workflow may also be generated by clicking the **Inbox** tab.

Search Activities

Name	Folders	Run Time
SUI_PR_EMPLOYEES		
Certificate/Licnese expiring th...	2	2021-02-25 08:37 PM
HR and PR Documents Pending...	1	2021-02-25 08:37 PM
HR Documents expiring this year	2	2021-02-25 08:37 PM
SUI_AP_VENDORS		
Invoices this year	0	2021-02-25 08:37 PM

Refresh rate   1 ▲▼   Refresh Now

State

List Folders

To generate a workflow from within the Inbox in GX (as shown here), select the desired workflow and then click the **List Folders** button, or double-click on the workflow.

Diagram F

one; then click the **down-arrow** button for the Activity field and select the desired search activity workflow to generate. See **Diagram F**.

b. On the main screen in GX, click the **Inbox** tab, and then either double-click on the desired workflow to generate, or click once on the desired workflow and then click the **List Folders** button.

Tip: The number of results (folders) matching the criteria for a workflow displays after the workflow name. To have the system automatically generate the workflows in the Inbox every so many minutes, enter the desired number of minutes in the Refresh Rate (minutes) field.

Note: Reminder, the search activity workflows that prompt for one or more values, or those that are defined with the Usage of **Private**, <u>cannot</u> be generated from within the Inbox (those workflows do <u>not</u> display in the Inbox).

c. On the main screen in GX, click the **Search Activity Catalog** button, then click the **down-arrow** to the left of the applicable application, click once on the workflow to generate, click the **Edit** button, and click the **Run** button.

2. The Search tab displays the results for the selected workflow.

Tip: If the workflow should return a list of folders, but a list of documents are displaying in the results instead, change the scope for searching in GX on the Search tab by clicking the **down-arrow** button to the right of the **Search (Documents)** or **Search (Attributes)** button (whichever is displaying) and select **Search (Folders)**; then generate the workflow again.

3. To view one of the folders or documents within the list of results, click once on the desired item.

4. After viewing a folder or document, to return to the list of results, click the **Search** tab.

5. Repeat the steps above to generate a different workflow.

Generating a Workflow in K12Docs:

1. From the main screen of K12Docs, select the **Inbox** button located at the top of the screen, and then select **Default** or **Ordered**. See **Diagram G**. Select **Default** to view the search activity workflows listed within each application in alphabetical order by the activity name; or select **Ordered** to view the search activity workflows listed in order by the number of results (folders or documents) matching the criteria (the number of results display in the Occurrences column from greatest to least).
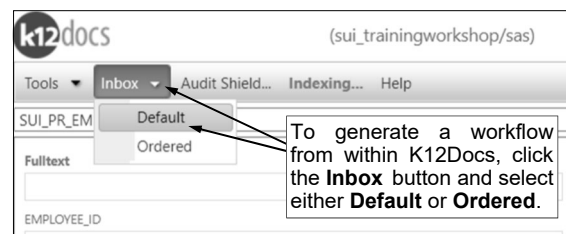

k12docs   (sui_trainingworkshop/sas)

Tools ▼ | Inbox ▼ | Audit Shield... | Indexing... | Help

SUI_PR_EM   Default
   Ordered

Fulltext

EMPLOYEE_ID

To generate a workflow from within K12Docs, click the **Inbox** button and select either **Default** or **Ordered**.

Diagram G

2. The list of the search activity workflows will display, along with the number of results (folders or documents) matching the criteria in the Occurrences column. See **Diagram H**.

Note: Only the search activity workflows for which the user (or role assigned to the user, if applicable) has rights for the Inbox (and Enabled) option as defined within the Authority option appear. Reminder, the search activity workflows that prompt for one or more values, or those that are defined with the Usage of **Private**, <u>cannot</u> be generated from within the Inbox (those workflows do <u>not</u> display in the Inbox).

3. Click once on the desired workflow to generate.

4. The main K12Docs screen appears with the results for the selected workflow. See **Diagram I**.

5. To view one of the folders or documents within the list of results, click once on the desired item.

6. After viewing a folder or document, to return to the list of results, close the K12Docs Portfolio screen (tab).

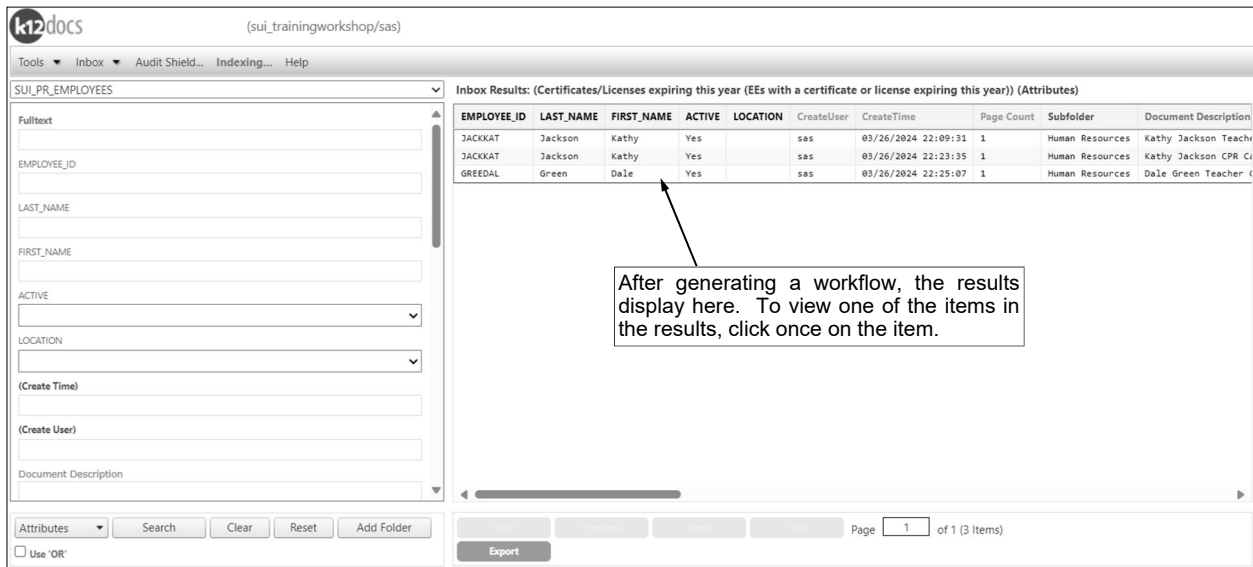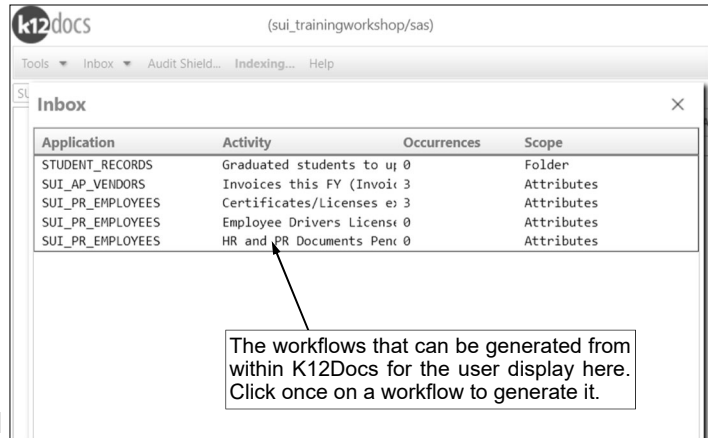7. Repeat the steps above to generate a different workflow.

Diagram H

The workflows that can be generated from within K12Docs for the user display here. Click once on a workflow to generate it.

After generating a workflow, the results display here. To view one of the items in the results, click once on the item.

Diagram I

Samples of Search Activity Workflows:

Below are additional examples of search activity workflows that can be defined for use with K12Docs.

Worflow 1: Shows a list of employee documents in the Human Resources and Payroll subfolders within the SUI_PR_Employees application with a Document Status of **Pending Review**.
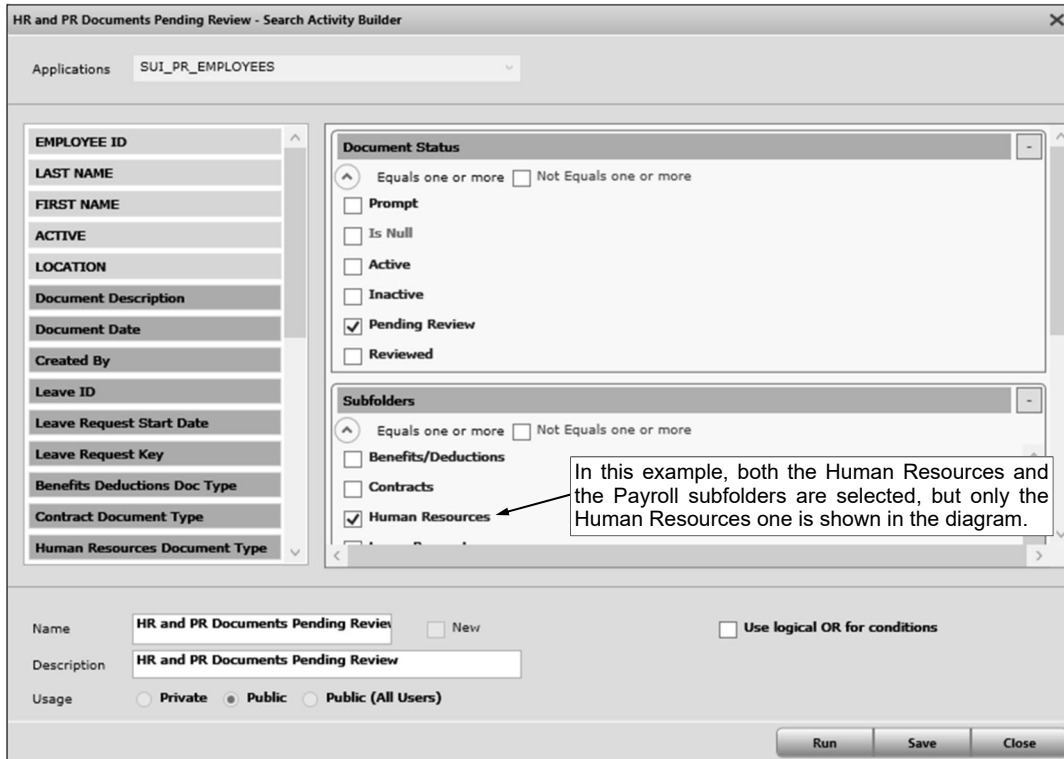
Worflow 2: Shows a list of employee documents in the Human Resources subfolder within the SUI_PR_Employees application with a Human Resources Document Type of **Licenses/Certificates** and an Expiration Date within the next 60 days.
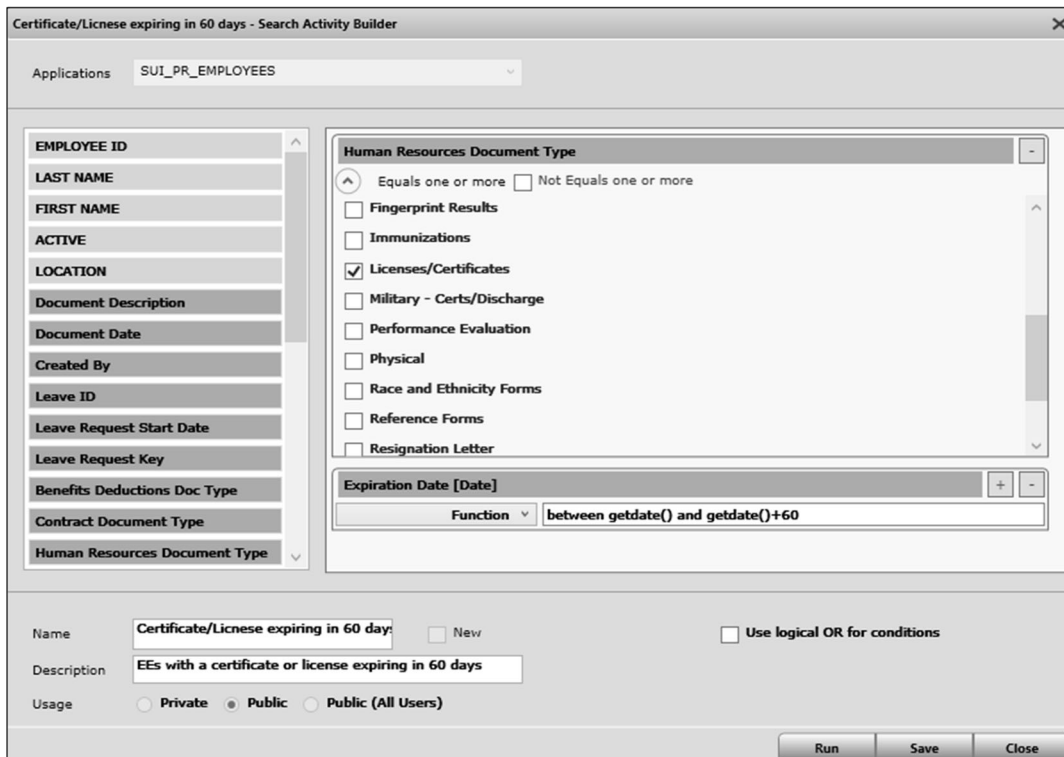
Worflow 3: Searches for vendors in the SUI_AP_Vendors application with invoices within a specified date range (prompts for vendor name and the range of invoice dates).
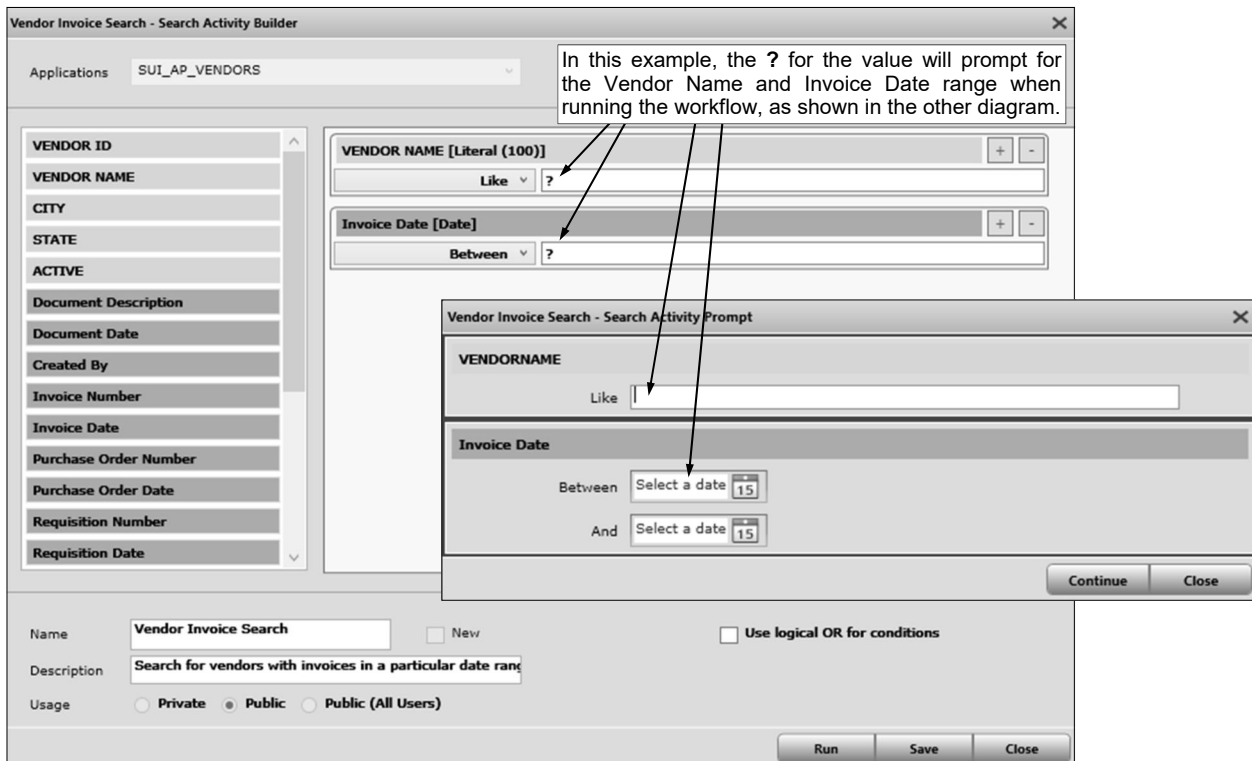
Worflow 4: Shows a list of invoices with an Invoice Date in 2021 for active vendors in the SUI_AP_Vendors application.
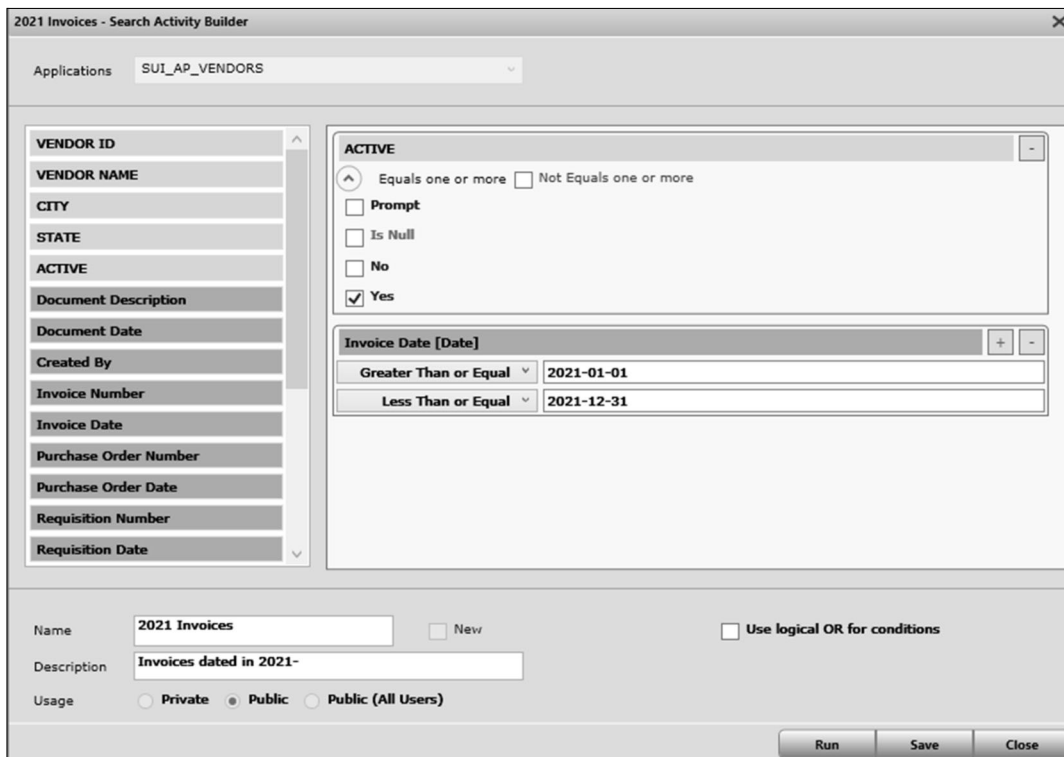
Worflow 5: Shows a list of active high school students whose Graduation Date is in the past in the Student_Records application and need their status updated to Graduated (from Active) and their School updated to Graduated Student (from High School).

Worflow 6: Shows a list of payee documents with a Document Date that is beyond the 7 year retention policy and can be deleted (compares the Document Date to the current computer date minus 2557 days, which is 7 years).

Worflow 7: Searches for employees within the SUI_PR_Employees application with a document containing an exact document description of **2024-2025 Teacher Contract** with a Contract Document Type of **Contract - Employment** and Employee Signature and School Staff Signatures of **Not Signed** or <u>blank</u>.