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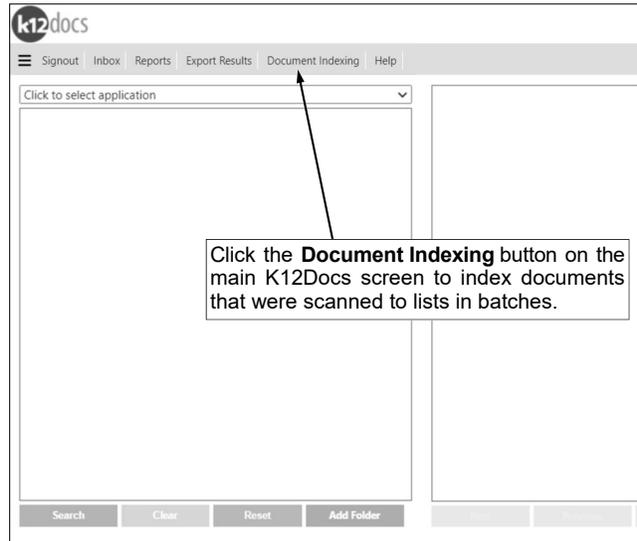
   Note: Only the indexing lists (including the default scan lists and any custom indexing lists if applicable) for which the user has rights that contain batches of documents waiting to be indexed and filed for the selected application appear in the drop-down list.

   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.

Click the **Document Indexing** button on the main K12Docs screen to index documents that were scanned to lists in batches.

Diagram A

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.
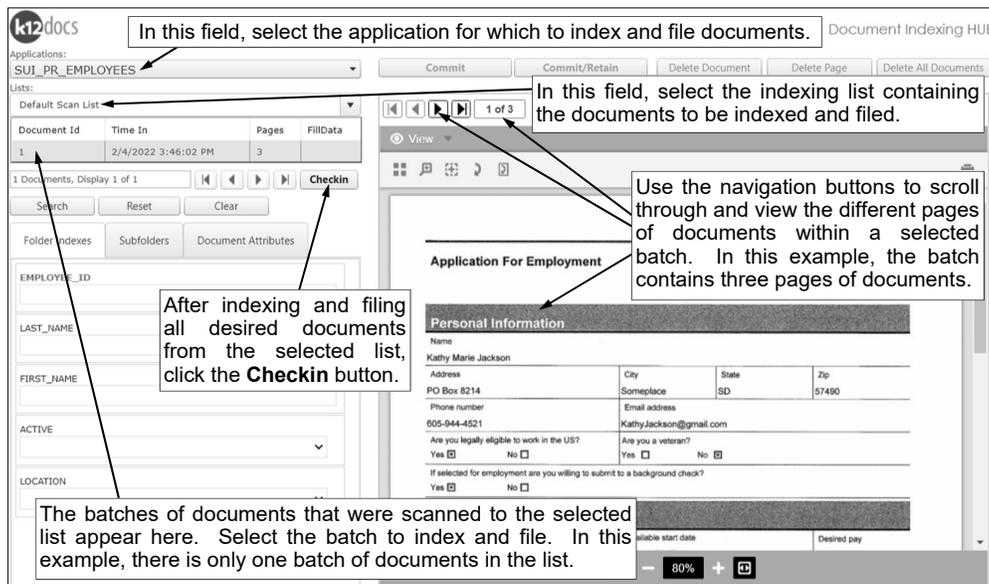

In this field, select the application for which to index and file documents.

In this field, select the indexing list containing the documents to be indexed and filed.

Use the navigation buttons to scroll through and view the different pages of documents within a selected batch. In this example, the batch contains three pages of documents.

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

The batches of documents that were scanned to the selected list appear here. Select the batch to index and file. In this example, there is only one batch of documents in the list.

Diagram B

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.

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 <u>blank</u> to view all the folders in the application.

        Tip: If desired, use the wildcard characters 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.
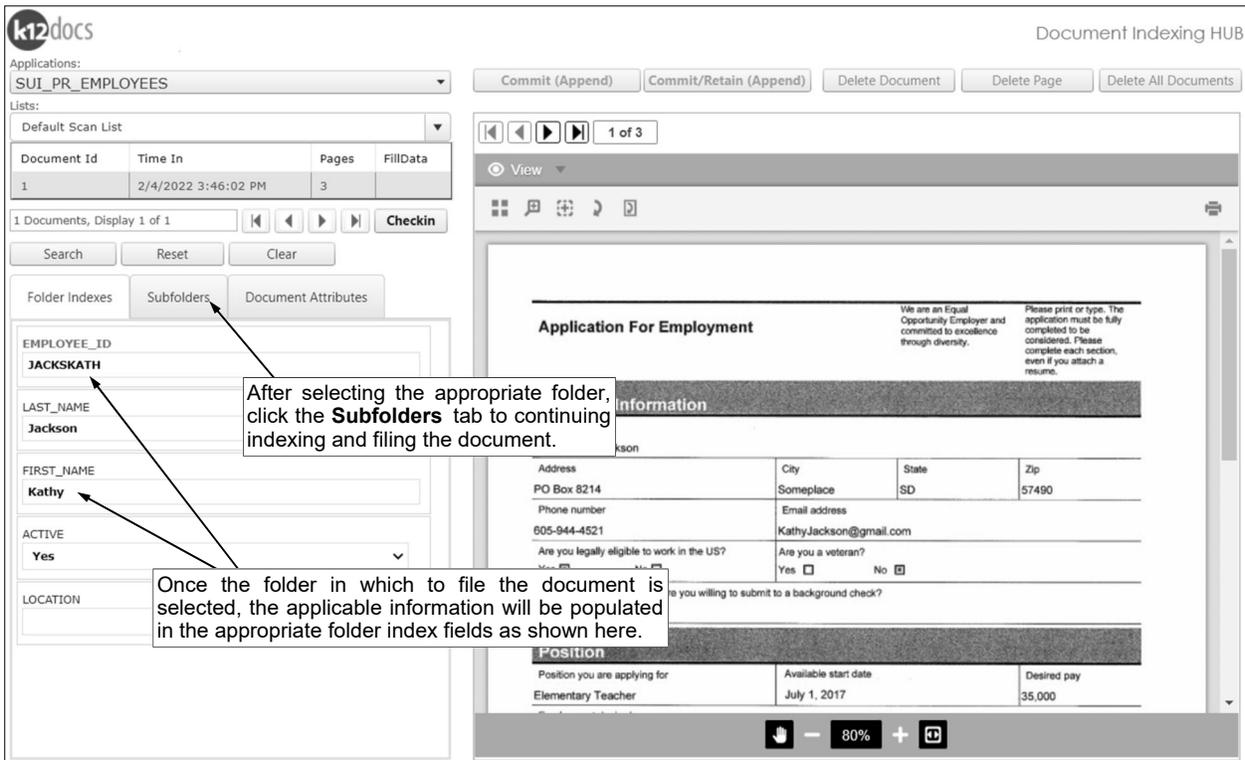

Diagram C

k12docs   Document Indexing HUB

Applications:
SUI_PR_EMPLOYEES
Lists:
Default Scan List

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

1 Documents, Display 1 of 1 |◀ ◀ ▶ ▶| Checkin

Search   Reset   Clear

Folder Indexes   Subfolders   Document Attributes

EMPLOYEE_ID
JACKSKATH

LAST_NAME
Jackson

> After selecting the appropriate folder, click the **Subfolders** tab to continuing indexing and filing the document.

FIRST_NAME
Kathy

ACTIVE
Yes

> Once the folder in which to file the document is selected, the applicable information will be populated in the appropriate folder index fields as shown here.

LOCATION

Commit (Append)   Commit/Retain (Append)   Delete Document   Delete Page   Delete All Documents

|◀ ◀ ▶ ▶| 1 of 3

👁 View ▾

Application For Employment

We are an Equal Opportunity Employer and committed to excellence through diversity.

Please print or type. The application must be fully completed to be considered. Please complete each section, even if you attach a resume.

...Information

...kson

Address	City	State	Zip
PO Box 8214	Someplace	SD	57490
Phone number	Email address		
605-944-4521	KathyJackson@gmail.com		
Are you legally eligible to work in the US?	Are you a veteran?		
Yes ☐ No ☐	Yes ☐ No ☒		

...e you willing to submit to a background check?

Position

Position you are applying for	Available start date	Desired pay
Elementary Teacher	July 1, 2017	35,000

80%

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.
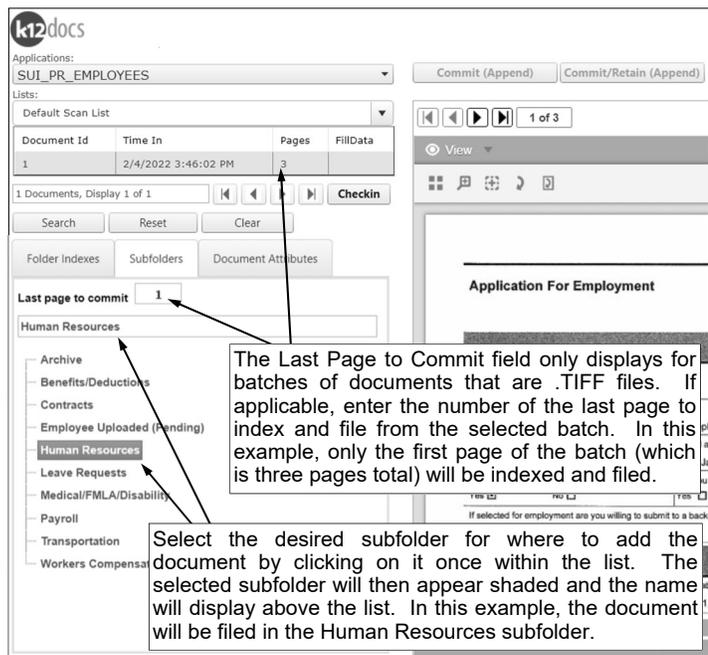

k12docs

Applications:
SUI_PR_EMPLOYEES
Lists:
Default Scan List

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

1 Documents, Display 1 of 1 |◀ ◀ ▶ ▶| Checkin

Search   Reset   Clear

Folder Indexes   Subfolders   Document Attributes

Last page to commit   1

Human Resources

- Archive
- Benefits/Deductions
- Contracts
- Employee Uploaded (Pending)
- **Human Resources**
- Leave Requests
- Medical/FMLA/Disability
- Payroll
- Transportation
- Workers Compensa...

Commit (Append)   Commit/Retain (Append)

|◀ ◀ ▶ ▶| 1 of 3

👁 View ▾

Application For Employment

> The Last Page to Commit field only displays for batches of documents that are .TIFF files. If applicable, enter the number of the last page to index and file from the selected batch. In this example, only the first page of the batch (which is three pages total) will be indexed and filed.

> Select the desired subfolder for where to add the document by clicking on it once within the list. The selected subfolder will then appear shaded and the name will display above the list. In this example, the document will be filed in the Human Resources subfolder.

Diagram E

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.

Diagram F