



K12Docs Advanced Topics Webinar

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E-Sign in K12Docs

The E-Sign feature is used for electronically signing documents previously uploaded and filed within K12Docs. The E-Sign feature is available for use within K12Docs, the School Accounting System, or Web Link (if applicable).

With the E-Sign feature, E-signatures can be defined by capturing a written, freehand signature or converting a typed signature to a cursive font. Once an E-signature is defined, it can be saved on the workstation, and then the E-signature can be added to a document as needed. When using the E-Sign feature, the date can also be added to the document to indicate when the document was signed.

After an E-signature (and date, if applicable) is added to a document, the changes to the document must be saved by using the **Save E-Sign** button.

Note: After saving a document with an E-signature, a document that is a .TIFF file will include the E-signature as part of the original file, while all other file types will create a copy of the file including the E-signature (with the copy being a .PDF file). For example, if an E-signature is added to a .PDF file (named DocumentA.PDF), the original file will remain without the E-signature (named DocumentA.PDF) and a copy of the file will be created containing the E-signature (named DocumentA-signed.PDF); or if an E-signature is added to a .DOC file (named DocumentB.DOC), the original file will remain without the E-signature (named DocumentB.DOC) and a copy of the file will be created containing the E-signature (named DocumentB-signed.PDF).

Defining an E-Signature:

1. Within K12Docs, the School Accounting System, or Web Link (if applicable), select to view the document for which to add a signature.
2. On the preview screen, click the **E-Sign** button. See **Diagram A**.
3. The button bar for the E-Sign features displays.
4. To define a new signature, complete one of the following:

Option 1-Freehand Signature:

- a. To capture a written, freehand signature, click the **Create Freehand Signature** button.
 - b. When prompted, draw the signature in the space provided using your mouse or touch screen. See **Diagram B**.
 - c. If desired, select the Save For Later field in order to save and use the signature in the future with other documents. A checkmark will appear in the box if the field is selected. By default, this field will be selected.
- Note:** If this field is selected, the E-signature is saved on the workstation and can be accessed by other users who are using that same workstation, if applicable.
- d. Click the **Save** button.

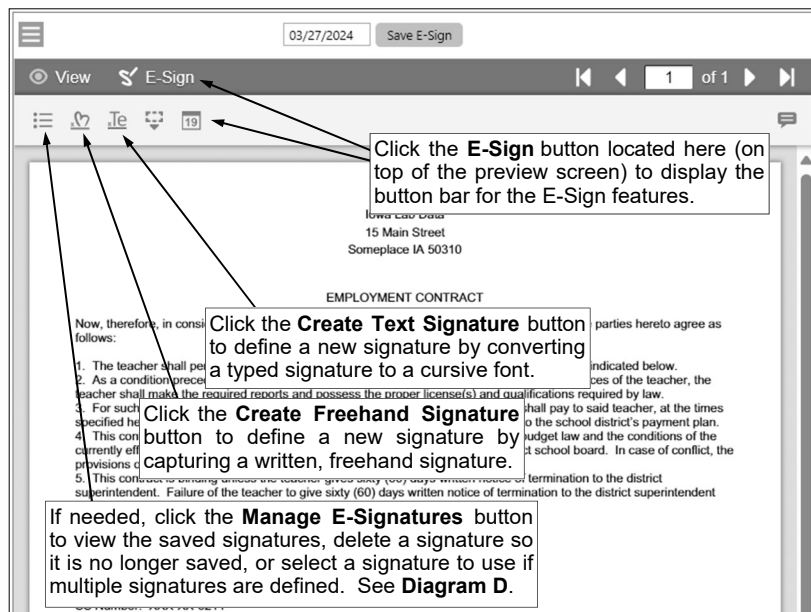


Diagram A

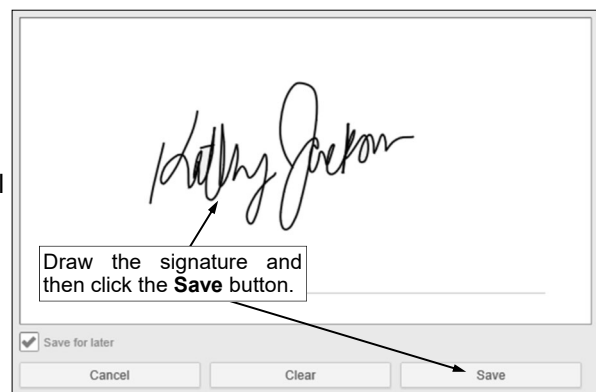


Diagram B

Option 2-Typed Signature:

- To define a new signature by converting a typed signature to a cursive font, click the **Create Text Signature** button.
- When prompted, enter the name to use for the signature in the Type Your Signature field. See **Diagram C**.
- Select the font to use for the signature by clicking on the desired font.
- If desired, select the Save For Later field in order to save and use the signature in the future with other documents. A checkmark will appear in the box if the field is selected. By default, this field will be selected.

Note: If this field is selected, the E-signature is saved on the workstation and can be accessed by other users who are using that same workstation, if applicable.

- Click the **Save** button.

Tip: If desired, click the **Manage E-Signatures** button (as shown in **Diagram A**) to view the signatures saved for future use, define a new signature, delete a previously saved signature, or select the signature to use if multiple signatures are defined. See **Diagram D**.

Adding an E-Signature to a Document:

- Within K12Docs, the School Accounting System, or Web Link (if applicable), select to view the document for which to add a signature.
- If the document is multiple pages, advance to the desired page for which to add the signature.
- On the preview screen, click the **E-Sign** button. See **Diagram E**.
- The button bar for the E-Sign features displays.
- Click the **Place E-Signature** button.

Note: If multiple signatures are defined, first click the **Manage E-Signatures** button and click the **Use Signature** button under the desired E-signature to use when adding the signature to this document; then click the **Done** button. See **Diagram D**.

- After clicking the **Place E-Signature** button, the mouse indicator will change to a pen icon. See **Diagram E**.
- Scroll to the desired location on the document for where to insert the signature and then click once.
- The image of the E-signature will display on the document. See **Diagram F**.

Diagram C

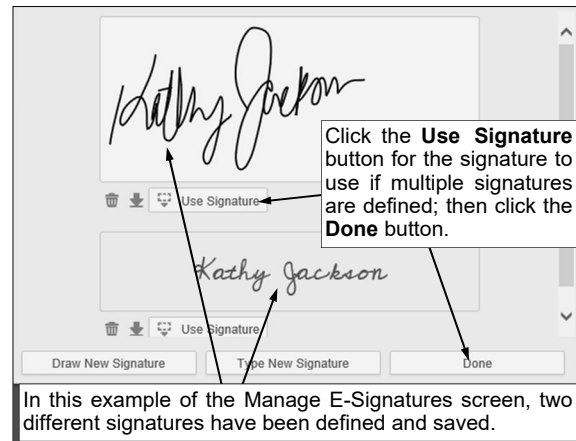
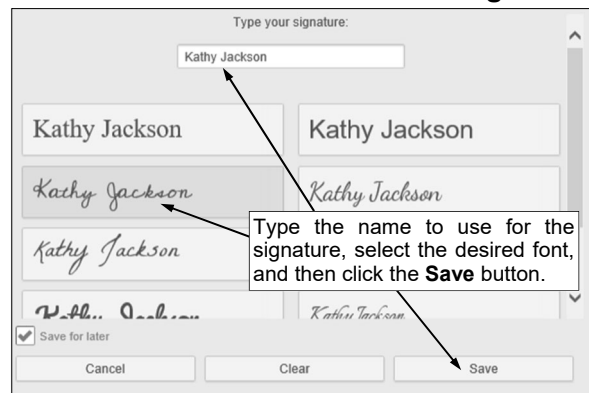


Diagram D

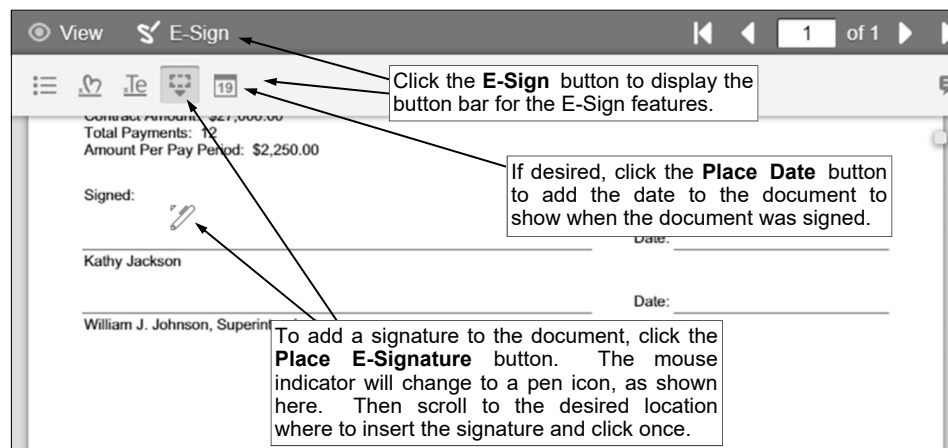


Diagram E

9. If needed, to resize the signature, click once on the signature image if it is not already selected. After a signature is selected, handles (dots) will appear around the outside edges. Click one of the resizing handles (dots) on the outlined signature image and drag as desired.

Tip: If needed, to delete the signature, click once on the signature image so it is selected and then press the **Delete** key on your keyboard.

10. If desired, to add the date to the document indicating when the document was signed, click the **Place Date** button. The mouse indicator will change to a pen icon. Scroll to the desired location within the document for where to insert the date and then click once. The date will display on the document. If needed, to resize the date, select the date if it is not already selected and click one of the handles (dots) on the outlined date image and drag as desired.
11. After all the changes for the signature (and date, if applicable) have been made, click the **Save E-Sign** button. See **Diagram F**.
12. A message will appear stating the changes were saved; click **OK**.

Note: After saving a document with an E-signature, a document that is a .TIFF file will include the E-signature as part of the original file, while all other file types will create a copy of the file including the E-signature (with the copy being a .PDF file). For example, if an E-signature is added to a .PDF file (named DocumentA.PDF), the original file will remain without the E-signature (named DocumentA.PDF) and a copy of the file will be created containing the E-signature (named DocumentA-signed.PDF); or if an E-signature is added to a .DOC file (named DocumentB.DOC), the original file will remain without the E-signature (named DocumentB.DOC) and a copy of the file will be created containing the E-signature (named DocumentB-signed.PDF).

Tip: If needed, right-click on the subfolder and select **Refresh Pagesets** to refresh the list of documents in the selected subfolder in order to view the second document containing the E-signature.

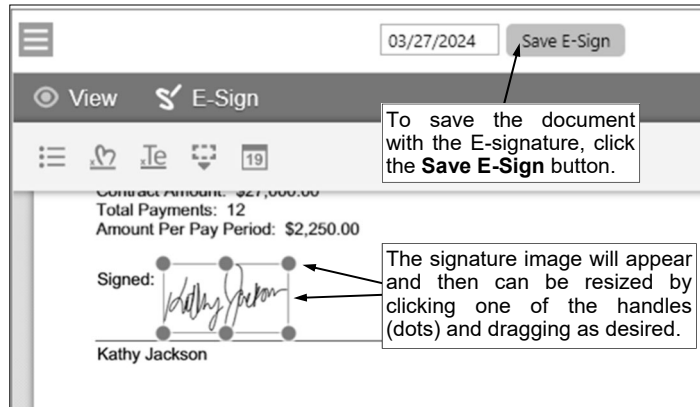


Diagram F

Annotations in K12Docs

The Annotations option in K12Docs is used to add highlights, textboxes, boxes, and/or stamps to a page on a document. Annotations can only be used with .TIFF files. Also, annotations are only available to be added to documents from within K12Docs (annotations are not available to be added when viewing documents from within the School Accounting System or Web Link, if applicable).

Adding Annotations to a Document in K12Docs:

1. Within K12Docs, select to view the document for which to add the annotation.

Note: Annotations can only be added if the document is a .TIFF file.

2. If the document is multiple pages, advance to the desired page for which to add the annotation.
3. Click the **Annotations** button located at the top of the preview screen. See **Diagram A**.

Tip: To change the properties for the annotation being added, such as the color, font, font size, or stamp type, click the **Menu** button (the button with the three lines) in the upper left corner of the preview screen, and then change the settings as desired (if needed, click the **Edit** button for Annotations if the properties do not show initially). See **Diagram B**. Then click the **Back** button to close the menu and view the full preview screen.

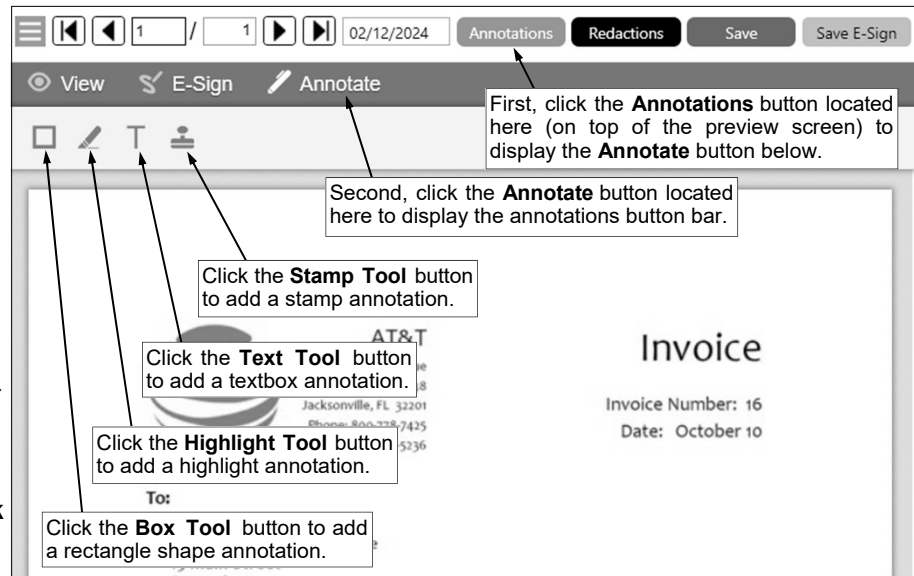


Diagram A

4. On the preview screen, click the **Annotate** button. See **Diagram A**.
5. The button bar for the annotations displays.
6. Click the appropriate button for the type of annotation to add to the document:
 - a. Click the **Box Tool** button to add a rectangle shape to the document.
 - b. Click the **Highlight Tool** button to add highlights to the document.
 - c. Click the **Text Tool** button to add a textbox to the document.
 - d. Click the **Stamp Tool** button to add a stamp to the document, such as for Approved, Copy, Void, etc.
7. After clicking the appropriate button, the mouse indicator will change to a cross.
8. Click at the location within the document for where to add the annotation, and drag and drop to the desired size.
9. The annotation will display on the document.

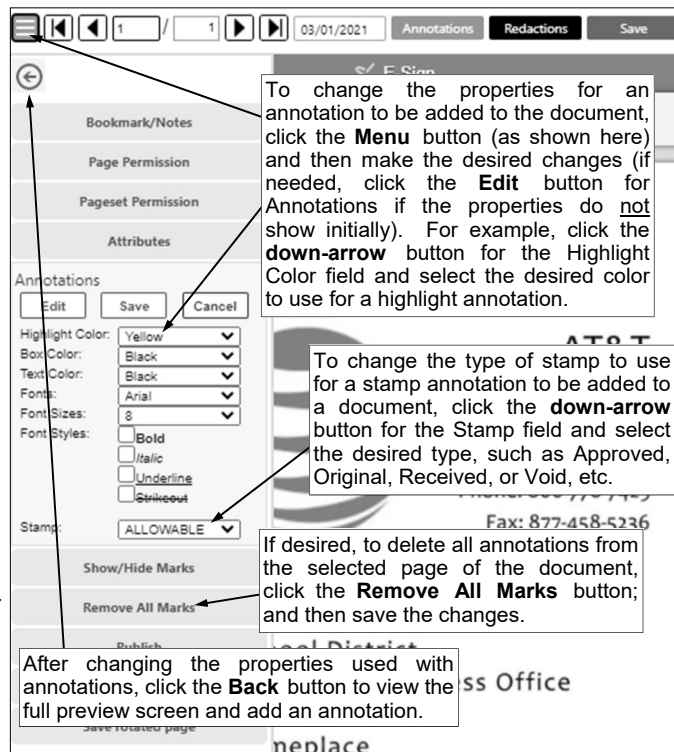


Diagram B

10. If adding a textbox annotation, click in the annotation (box) and key the desired text; then when finished, click in a different location on the preview screen.
11. If needed, to resize the annotation, click once on the annotation if it is not already selected. After the annotation is selected, handles (dots) will appear around the outside edges. See **Diagram C**. Click one of the resizing handles (dots) on the annotation and drag as desired. If the annotation is a textbox, a pencil icon will appear in the box; if needed, click the pencil icon to edit the text.
Tip: If needed, to delete the annotation, click once on the annotation so it is selected and then press the **Delete** key on your keyboard. To hide or show all the annotations on the selected page of the document, click the **Menu** button (the button with the three lines) located in the upper left corner of the preview screen and click the **Show/Hide Marks** button (if needed, click the **Edit** button for Annotations if the **Show/Hide Marks** button is not enabled initially). To delete all annotations on the selected page of the document, click the **Menu** button (the button with the three lines) located in the upper left corner of the preview screen and click the **Remove All Marks** button (see **Diagram B**; if needed, click the **Edit** button for Annotations if the **Remove All Marks** button is not enabled initially); then save the changes (see Step 13).
12. Repeat Steps 6-11 to add additional annotations to the document.
13. After all the changes for the annotations have been made, click the **Save** button located at the top of the preview screen. See **Diagram C**. The changes can also be saved by clicking the **Menu** button (the button with the three lines) located in the upper left corner of the preview screen and clicking the **Save** button for Annotations.
14. A message will appear stating the changes were saved; click **OK**.

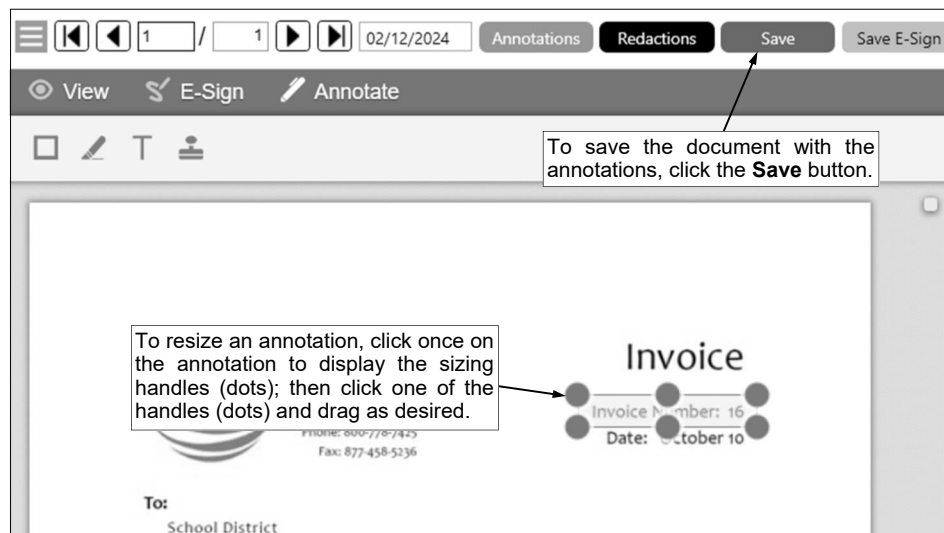


Diagram C

Export Search Results in K12Docs

When searching for folders or documents in K12Docs, the list of results can be exported by using the **Export** button located at the bottom of the main K12Docs screen, if the user (or role tied to the user, if applicable) has rights to export results.

Searching in K12Docs:

1. On the main screen in K12Docs (see **Diagram A**), select the desired application for which to search by clicking the **down-arrow** button for the Application field and choosing the correct one. For example, to search for a folder or document for a vendor, select the **SUI_AP_VENDORS** application; to search for a folder or document for an employee, select the **SUI_PR_EMPLOYEES** application; or to search for a folder or document for a student, select the **STUDENT_RECORDS** application, etc.
2. The folder indexes for the specified application appear under the Application field.
3. Search for and select the desired folder and then locate the document to view, or search directly for the desired document from the main screen.

Searching for a folder and locating the document:

- a. 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: Use a wildcard character, such as the percent sign (%), as a placeholder in your variable search information for the indexes. The percent sign (%) is a placeholder for an unlimited number of characters. For example, enter **G%** in the EMPLOYEE_ID index field (within the SUI_PR_EMPLOYEES application) to view the folders for all employees defined with an ID starting with the letter G; enter **%OFFICE%** in the VENDOR_NAME index field (within the SUI_AP_VENDORS application) to view the folders for all vendors with the word "Office" as part of their name; or enter **G%** in the LAST_NAME index field (within the STUDENT_RECORDS application) to view the folders for all students with a last name starting with the letter G. Additional wildcard characters and operators available for use when searching are listed on **page 4 - C** of this handout.

Note: If multiple index fields are completed when searching, select the Use 'OR' field (located in the lower left corner of the screen) to require only one of the search conditions to match in order for a folder to be included in the results; otherwise, if the Use 'OR' field is not selected, all the search conditions must be met in order for a folder to be included in the results.

- b. Click the **Search** button located under the list of folder indexes.

The screenshot shows the K12Docs search interface. On the left, there's a search criteria panel with a dropdown menu set to 'SUI_PR_EMPLOYEES'. Below it are input fields for 'Fulltext', 'EMPLOYEE_ID', 'LAST_NAME', 'FIRST_NAME', 'ACTIVE', and 'LOCATION'. A callout box points to the application dropdown with the text: 'Select the application to work with in this field.' Another callout points to the input fields with the text: 'Enter the search criteria in the applicable fields.' At the bottom left, there's a 'Folders' button and a checkbox for 'Use OR'. A callout box points to the 'Folders' button with the text: 'To search directly for a document instead of first searching for a folder, click the **Folders** button and select **Attributes**.' On the right, there's a table titled 'Search Results (Folders)' with columns: EMPLOYEE_ID, LAST_NAME, FIRST_NAME, and ACTIVE. The table contains 26 rows of employee data. A callout box points to the table with the text: 'If needed, use the navigation buttons to advance through the list of results if there are multiple pages of records.' At the bottom right, there are navigation buttons: 'Next', 'Last', 'Page 1 of 2 (26 items)', and an 'Export' button.

EMPLOYEE_ID	LAST_NAME	FIRST_NAME	ACTIVE
ANDREJUL	Anderson	Julia	Yes
BROWDAV	Brown	David	Yes
GREEDAL	Green	Dale	Yes
JACKKAT	Jackson	Kathy	Yes
JOHNWIL	Johnson	William	Yes
MADISUS	Madison	Susie	Yes
PATTERSON	Patterson	Maria	Yes
SAMPSON	Sampson	Becky	Yes
SMITH	Smith	Carolyn	Yes
THOMAS	Thomas	Rick	Yes
WATSON	Watson	Michael	Yes
WILLIAMSON	Williamson	Bert	Yes
JOHNJOE	Johnson	Joe	Yes
WHITMAY	White	Mary	Yes
BAXTER	Baxter	Jackie	Yes
CASPBET	Casper	Becky	Yes
HILLMAY	Hill	Mary	Yes
HERINGRA	Herring	Grace	Yes
PARKJUD	Park	Judith	Yes
COLLOLI	Collins	Lori	Yes

Diagram A

- c. The folders matching the specified criteria display on the right side of the screen.

Searching directly for a document from the main screen:

- a. Click the **Folders** button located in the lower left corner of the screen, and select **Attributes**.
- b. Enter the criteria on which to search in the applicable folder index and/or document attribute fields, or if applicable, click the **down-arrow** button to select the correct criteria for a particular field. Leave all the index and attribute fields blank to view all the documents within all the folders in the application.

Tip: Use a wildcard character, such as the percent sign (%), as a placeholder in your variable search information for the indexes. The percent sign (%) is a placeholder for an unlimited number of characters.

Note: If multiple index and/or attribute fields are completed when searching, select the Use 'OR' field (located in the lower left corner of the screen) to require only one of the search conditions to match in order for a document to be included in the results; otherwise, if the Use 'OR' field is not selected, all the search conditions must be met in order for a document to be included in the results.

- c. Click the **Search** button located under the list of folder indexes and document attributes.
- d. The documents matching the specified criteria will appear on the right side of the screen.

Exporting Search Results in K12Docs:

1. After completing a search in K12Docs, the folders or documents matching the specified criteria display on the right side of the screen. See **Diagram B**.

Tip: To change the sort order of the results, click on the column heading (text) for the desired field to sort the records in ascending order by that particular field (column), or click a second time on the column heading (text) to sort the records in descending order; an up or down arrow will appear to the right of the column heading indicating the order of the records (ascending or descending).

2. To export the list of results from the search, click the **Export** button located at the bottom of the screen (under the list of results).

Note: The **Export** button only displays if the user (or role tied to the user, if applicable) has rights to export results.

3. The list of results will be exported to a .CSV file and can be opened and then downloaded, if desired.

The screenshot shows the K12Docs application interface. On the left, there is a sidebar with a search filter dropdown set to 'SUI_AP_VENDORS'. Below this, there are input fields for 'Fulltext', 'VENDOR_ID', 'ATT', 'VENDOR_NAME', 'CITY', 'STATE', 'ACTIVE', '(Create Time)', '(Create User)', and 'Document Description'. At the bottom of the sidebar, there are buttons for 'Attributes', 'Search', 'Clear', 'Reset', and 'Add Folder', along with a checkbox for 'Use OR'. The main area on the right displays 'Search Results (Attributes)' as a table with columns: VENDOR_ID, VENDOR_NAME, CITY, STATE, ACTIVE, CreateUser, CreateTime, Page Count, Subfolder, and Document Description. The table contains three rows of data. Below the table, there is an 'Export' button. Two callout boxes with arrows point to the table and the 'Export' button, providing instructions.

VENDOR_ID	VENDOR_NAME	CITY	STATE	ACTIVE	CreateUser	CreateTime	Page Count	Subfolder	Document Description
ATT	AT&T	Jacksonville	FL	Yes	sas	03/26/2024 22:38:11	1	General	Letter with updated customer numbe
ATT	AT&T	Jacksonville	FL	Yes	svouser	03/26/2024 22:46:07	1	Invoices	Invoice #75
ATT	AT&T	Jacksonville	FL	Yes	sas	03/26/2024 22:06:43	1	General	Letter with Customer Account Numbe
ATT	AT&T	Jacksonville	FL	Yes	sas	03/26/2024 22:07:21	1	Invoices	ATT Oct Invoice #16

The list of results from the search display here.

Click the **Export** button to export the list of search results.

Page 1 of 1 (4 items)

Diagram B

Wildcard Characters and Operators Available for Use When Searching in K12Docs:

When searching for folders or documents from within K12Docs, the following wildcard characters and operators are available:

1. **% (Percent Sign):** Use the wildcard character of the percent sign (%) as a placeholder in your variable search information for an unlimited number of characters. For example, enter **G%** in the EMPLOYEE_ID index field (within the SUI_PR_EMPLOYEES application) to view the folders for all employees defined with an ID starting with the letter G; enter **%OFFICE%** in the VENDOR_NAME index field (within the SUI_AP_VENDORS application) to view the folders for all vendors with the word "Office" as part of their name; or enter **G%** in the LAST_NAME index field (within the STUDENT_RECORDS application) to view the folders for all students with a last name starting with the letter G.
2. **_ (Underscore):** Use the wildcard character of the underscore (_) as a placeholder in your variable search information for one character. For example, enter **B__W** in the VENDOR_NAME index field (within the SUI_AP_VENDORS application) to view the folders for all vendors with a name including a B as the first character, followed by any two characters, and then W as the last character (i.e. BLOW or BREW).
3. **< (Less Than):** Use the operator of less than (<) in your variable search information to view all the records with values less than a specified value. For example, enter **<SMITH** in the EMPLOYEE_ID index field (within the SUI_PR_EMPLOYEES application) to view the folders for all employees defined with an ID that alphabetically comes before SMITH.
4. **> (Greater Than):** Use the operator of greater than (>) in your variable search information to view all the records with values greater than a specified value. For example, enter **>SMITH** in the EMPLOYEE_ID index field (within the SUI_PR_EMPLOYEES application) to view the folders for all employees defined with an ID that alphabetically comes after SMITH.
5. **<= (Less Than or Equal To):** Use the operator of less than or equal to (<=) in your variable search information to view all the records with values less than or equal to a specified value. For example, enter **<=SMITH** in the EMPLOYEE_ID index field (within the SUI_PR_EMPLOYEES application) to view the folders for all employees defined with an ID that equals SMITH or alphabetically comes before SMITH.
6. **>= (Greater Than or Equal To):** Use the operator of greater than or equal to (>=) in your variable search information to view all the records with values greater than or equal to a specified value. For example, enter **>=SMITH** in the EMPLOYEE_ID index field (within the SUI_PR_EMPLOYEES application) to view the folders for all employees defined with an ID that equals SMITH or alphabetically comes after SMITH.
7. **!< (Not Less Than):** Use the operator of not less than (!<) in your variable search information to view all the records with values that are not less than a specified value. For example, enter **!<SMITH** in the EMPLOYEE_ID index field (within the SUI_PR_EMPLOYEES application) to view the folders for all employees defined with an ID that does not alphabetically come before SMITH (results in those with the ID of SMITH and after).
8. **!> (Not Greater Than):** Use the operator of not greater than (!>) in your variable search information to view all the records with values that are not greater than a specified value. For example, enter **!>SMITH** in the EMPLOYEE_ID index field (within the SUI_PR_EMPLOYEES application) to view the folders for all employees defined with an ID that does not alphabetically come after SMITH (results in those with the ID of SMITH and before).
9. **!= (Not Equal To):** Use the operator of not equal to (!=) in your variable search information to view all the records with values that are not equal to a specified value. For example, enter **!=SMITH** in the EMPLOYEE_ID index field (within the SUI_PR_EMPLOYEES application) to view the folders for all employees defined with an ID that is not equal to SMITH.
10. **| (Pipe Symbol):** Use the pipe symbol (|) as the between operator in your variable search information to view all the records with values that are between two specified values. For example, enter **DOE|SMITH** in the EMPLOYEE_ID index field (within the SUI_PR_EMPLOYEES application) to view the folders for all employees defined with an ID that is equal to and between DOE and SMITH.
11. **[] (Brackets):** Use the brackets ([]) as the in operator in your variable search information, without a space between the brackets, followed by designated values separated by commas (and no spaces), to view all the records with the designated values in the list. For example, enter **[]SMITH,JONES,WILSON** in the EMPLOYEE_ID index field (within the SUI_PR_EMPLOYEES application) to view the folders for the employees defined with an ID of SMITH, JONES, and WILSON.

Fulltext Search in K12Docs

The fulltext search feature in K12Docs allows a search to be completed against the typed text in documents (applicable for .TIFF documents). For example, use the fulltext search feature to search for a specific word or phrase contained within the typed text of .TIFF documents. The fulltext search feature is available from the main K12Docs screen in order to find .TIFF documents within a specified application that contains certain text, or from the K12Docs Portfolio tab (for a selected folder) in order to find .TIFF documents within the specified folder that contains certain text.

Using Fulltext Search from Main K12Docs Screen:

Tip: The fulltext search feature on the main K12Docs screen works best when searching on the document level (scope is set to Documents or Attributes).

1. On the main screen in K12Docs, select the desired application for which to search by clicking the **down-arrow** button for the Application field and choosing the correct one. See **Diagram A**.
2. Click the **Folders** button located in the lower left corner of the screen and select **Documents** or **Attributes**.
3. Enter the criteria on which to search in the Fulltext field.

Note: When searching for a specific word or number, or searching for a phrase, enter the word, number, or phrase as normal (a phrase does not need to be enclosed in quotations). For example, if searching for documents containing the word *application*, enter **application**; if searching for documents containing the number 8214, enter **8214**; if searching for documents containing the amount of \$190.55, enter **\$190.55**; or if searching for documents containing the phrase *employment application*, enter **employment application**.

4. Click the **Search** button located under the list of folder indexes and document attributes.
5. The .TIFF documents matching the specified criteria will appear on the right side of the screen.
6. Select a document to view (or open) by clicking on the desired record.
7. The K12Docs Portfolio screen will open for the specified folder and document.

- The documents within the folder that contain the specified text will display with FTX in the Pages/File column, with FTX (and the other text in the Pages/Files column) in purple text. See **Diagram B**.

Diagram A

Diagram B

- When the specific page of the document that contains the specified text is displayed in the preview screen, **FTX** will display in the top right corner of the preview screen.
- If the selected folder has additional documents matching the fulltext search criteria, click the **down-arrow** button for the Search Results field and select another document.
Tip: The number of documents in the selected folder matching the fulltext search criteria displays in parenthesis at the end in the Search Results field.
- If desired, to view the other folders and documents matching the fulltext search results, click the **Previous Folder** button or the **Next Folder** button to advance to the previous or next folder, and then click the **down-arrow** button for the Search Results field and select a document.

Audit Shield

The Audit Shield feature in GX is used to search for missing documents of a certain document type. For example, use the Audit Shield feature to find all the vendors who are missing a document with the document type of **W9**, or to find all the employees who are missing a document with the document type of **Social Security Card** or the document type of **Federal I9**. With the Audit Shield feature, the desired policies for which missing documents to find within an application are set up within GX and then can be accessed by generating the policies from within K12Docs.

Adding an Audit Shield Policy in GX:

1. Within GX, select the **Tools** menu and then **Audit Shield**.
2. On the Audit Shield screen, click the **Policy Editor** tab if not already selected. See **Diagram A**.
3. Complete the fields for the new policy:
 - a. In the Application field, select the desired application for which to define the new policy by clicking the **down-arrow** button and choosing the correct one.
 - b. In the Policy Name field, verify **<new>** displays in order to add a new policy; if needed, click the **down-arrow** button and select **<new>**. Then enter a unique name for the new policy in the Policy Name field by keying over the text (keying over **<new>**). The name can be alphanumeric and up to **50** characters long.
 - c. If desired, enter a longer description for the policy in the Policy Description field. The description can be up to **256** characters long.
 - d. Add a rule for the policy by completing the following:
 - The Rules field will be blank when adding the first rule, and then once a rule has been added, it will show as Rule 1, and if a second rule is added, it will show as Rule 2, etc.
 - In the Check Set section in the lower left side of the screen, select the criteria for which folders (and subfolders) to search for the missing documents, if desired. For example, if adding a new policy in the SUI_PR_Employees application and only the folders for the active employees need to be checked, click to expand the Active index field and then choose **Yes**; see **Diagram A**.

The screenshot shows the 'Policy Editor' tab in the AuditShield application. The interface includes the following sections and annotations:

- Application:** A dropdown menu showing 'SUI_PR_EMPLOYEES'. An annotation points to the dropdown arrow: 'Click the **down-arrow** button to select the application for which to add or edit a policy.'
- Policy Name:** A text field containing 'Employees Missing SSN Card'. An annotation points to the text: 'Initially, **<new>** will appear in this field. When adding a new policy, key over the text for **<new>** with a unique name; otherwise, to view or edit an existing policy, click the **down-arrow** button to select the correct one.'
- Policy Description:** A text field containing 'Employees Missing a copy of their Social Security Card'.
- Buttons:** 'Save Policy', 'Delete Policy', and 'Run Policy' are located to the right of the description field.
- Rules:** A section showing 'Rule 1' with buttons for 'Add', 'Modify', 'Remove', 'Active', and 'Clear Both'. An annotation points to the 'Add' button: 'After making the selections for the Check Set and Audit Set, click the **Add** button.'
- Check Set:** A section on the left with various criteria:
 - EMPLOYEEID**, **LAST NAME**, **FIRST NAME**: Text input fields.
 - ACTIVE**: A checkbox section with 'No' and 'Yes' options. The 'Yes' option is selected. An annotation points to it: 'If desired, make the selections for what folders (and subfolders) to search for the missing documents in the Check Set section. In this example, only the folders for Active employees will be searched.'
 - LOCATION**, **Subfolders**: Text input fields.
 - Document Description**, **Document Date**: Text input fields.
- Audit Set:** A section on the right with document type categories:
 - Leave Request Key**, **Benefits Deductions Doc Type**, **Contract Document Type**: Text input fields.
 - Human Resources Document Type**: A list of checkboxes including 'Physical', 'Race and Ethnicity Forms', 'Reference Forms', 'Resignation Letter', 'Social Security Card' (which is checked), and 'Transcripts/Lane Change'.
 - Med FMLA Disability Doc Type**, **Payroll Document Type**: Text input fields.

Diagram A

Tip: To search all the folders for the missing documents, do not make any changes to the Check Set section. Also, wildcard characters cannot be used with these fields.

- In the Audit Set section in the lower right side of the screen, select the criteria for which missing documents to search. For example, if adding a new policy in the SUI_PR_Employees application to find employees that are missing a document with the Human Resources Document Type of Social Security Card, click to expand the Human Resources Document Type attribute field and then choose **Social Security Card**; see **Diagram A**.

Tip: Wildcard characters cannot be used with these fields.

- Click the **Add** button located to the right of the Rules field to save the new rule.
- If needed, repeat these steps to additional rules.

4. Click the **Save Policy** button.

Changing an Audit Shield Policy in GX:

1. Within GX, select the **Tools** menu and then **Audit Shield**.
2. On the Audit Shield screen, click the **Policy Editor** tab if not already selected.
3. In the Application field, select the application which includes the policy to edit by clicking the **down-arrow** button and choosing the correct one.
4. Click the **down-arrow** button for the Policy Name field and select the policy to edit.
5. Make the desired changes to the policy.
 - a. To add a new rule to the policy, complete the Check Set and Audit Set sections as desired, and then click the **Add** button located to the right of the Rules field to save the new rule.
 - b. To make changes to an existing rule for the policy, click the **down-arrow** button for the Rules field and select the rule to edit; then make the desired changes in the Check Set and Audit Set sections and click the **Modify** button.

Tip: If desired, to clear all the previous selections within the Check Set and Audit Set sections for the existing rule, click the **Clear Both** button; then complete the desired selections and click the **Modify** button.

 - c. To delete an existing rule from the policy, click the **down-arrow** button for the Rules field and select the rule to delete; then click the **Remove** button.
6. Click the **Save Policy** button to save the changes.

Deleting an Audit Shield Policy in GX:

1. Within GX, select the **Tools** menu and then **Audit Shield**.
2. On the Audit Shield screen, click the **Policy Editor** tab if not already selected.
3. In the Application field, select the application which includes the policy to delete by clicking the **down-arrow** button and choosing the correct one.
4. Click the **down-arrow** button for the Policy Name field and select the policy to delete.
5. Click the **Delete Policy** button.

Generating an Audit Shield Policy in GX:

1. Within GX, select the **Tools** menu and then **Audit Shield**.
2. On the Audit Shield screen, click the **Audit Report** tab. See **Diagram B**.
3. Click the **Select Policy** button.
4. The Run Audit Policy screen displays listing all the existing policies defined in Audit Shield for the different applications. See **Diagram C**.
5. Select the policy to generate by double-clicking on the desired policy, or else by clicking once on the desired policy and then clicking the **Run** button.

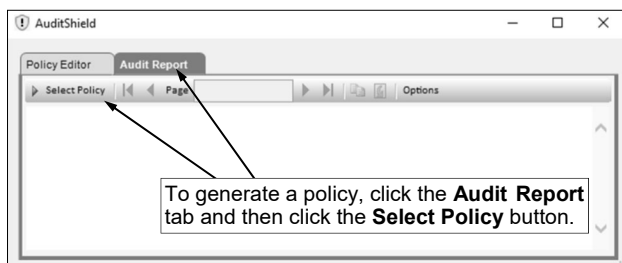


Diagram B

6. The results of the folders missing the specified documents appear on the screen. See **Diagram D**. If needed, click the navigation buttons (**First Page**, **Previous Page**, **Next Page**, or **Last Page**) to scroll through all the pages of the results.

Tip: To change the number of results that appear on each page, click the **Options** button and select the number of folders to display per page; then click **OK**.

Note: To export the results to a file, click the **Export Report** button; then complete the Export Format section by selecting the desired file type for which to export the results, specify the correct path (drive and folders) and file name, and click **OK**.

7. Repeat Steps 3-6 to generate a different policy.
8. When finished generating the desired policies, click the **X** in the upper right-hand corner to return to the main GX screen.

Tip: If desired, a policy can also be generated on the Policy Editor tab of the Audit Shield screen by bringing up the desired policy and then clicking the **Run Policy** button.

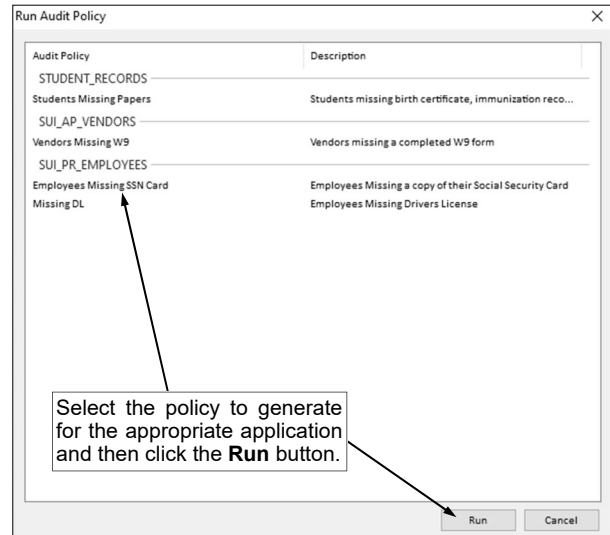


Diagram C

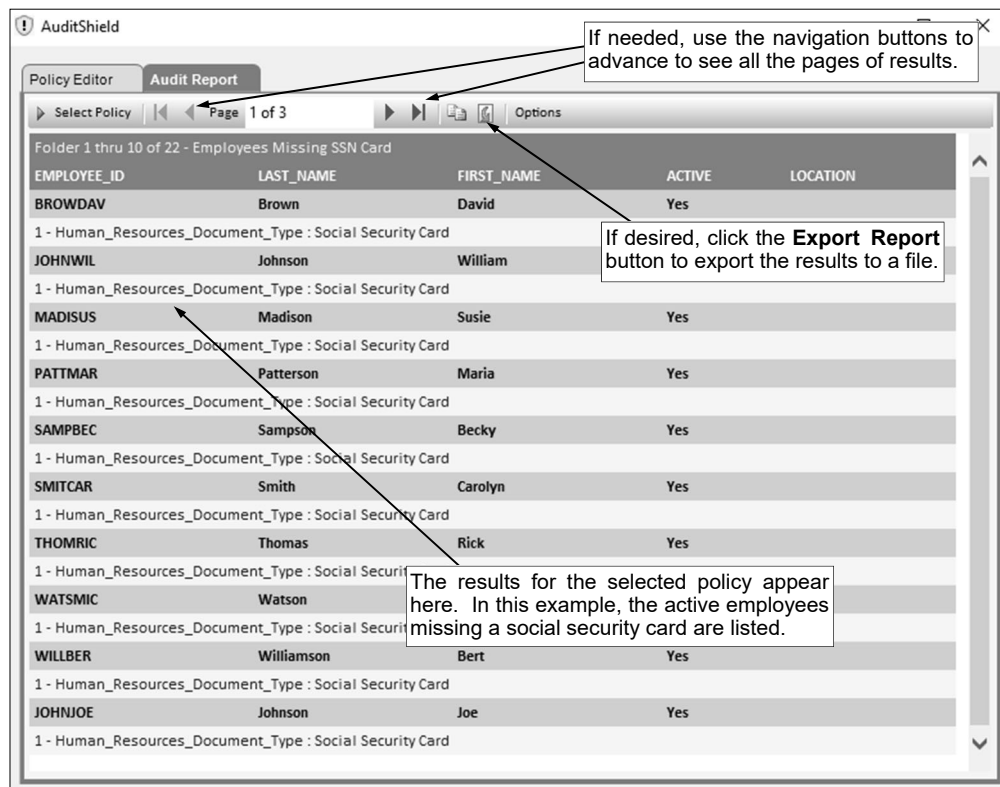


Diagram D

Generating an Audit Shield Policy in K12Docs:

1. From the main screen of K12Docs, select the **Audit Shield** button located at the top of the screen. See **Diagram E**.

2. The Audit Shield screen displays listing all the existing policies defined in Audit Shield for the different applications. See **Diagram F**.
3. Select the policy to generate and then click the **Run Policy** button.
4. The results of the folders missing the specified documents appear on the screen. See **Diagram G**. If needed, click the navigation buttons (**First**, **Previous**, **Next**, or **Last**) to scroll through all the pages of the results.

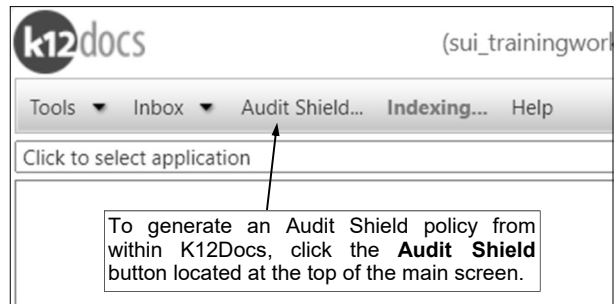


Diagram E

Tip: To change the number of results that appear on each page, click the **down-arrow** button located to the right of the current number of folders to display per page and select the correct number.

Note: To export the results to a file, select the type of file for which to save the results and then click the **Download** button.

5. To generate a different policy, click the **Back** button and then repeat Steps 3-4.
6. When finished generating the desired policies, click the **X** in the upper right-hand corner to return to the main K12Docs screen.

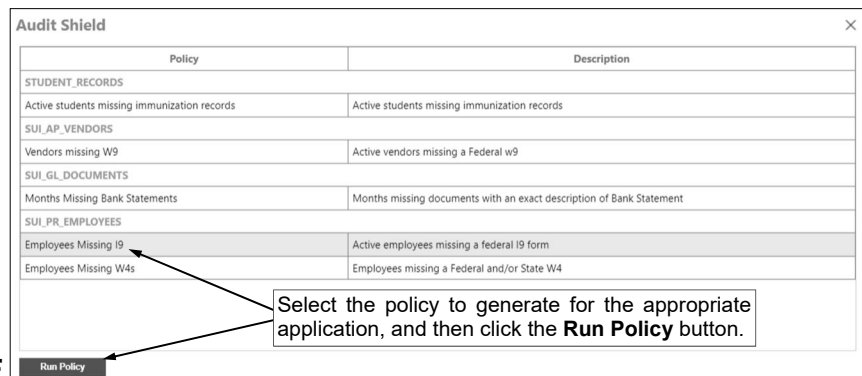


Diagram F

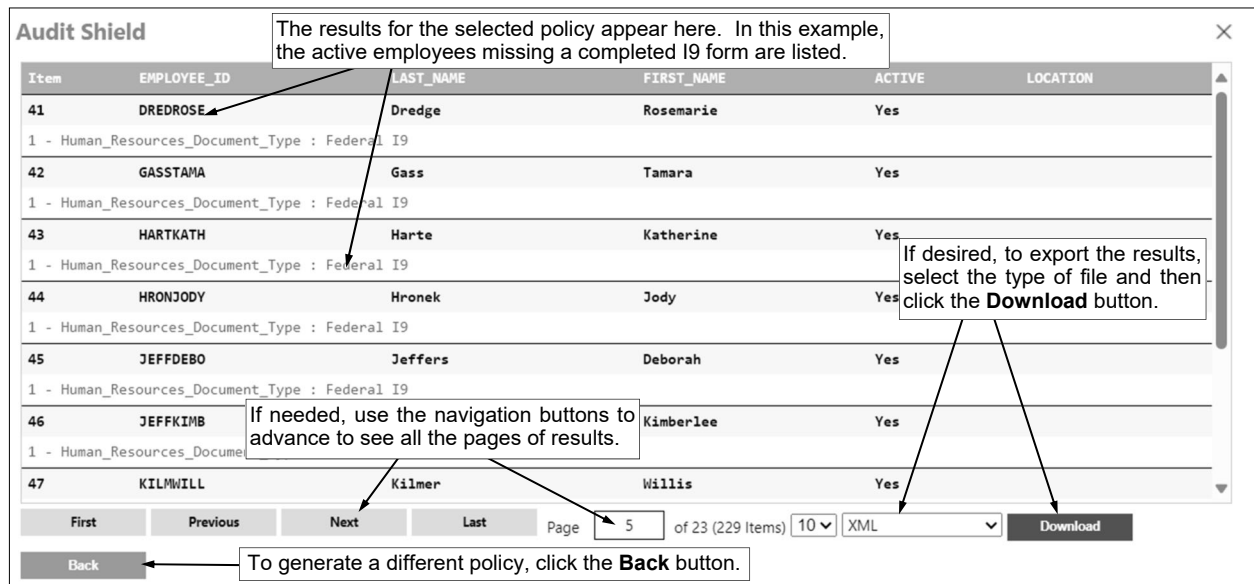


Diagram G

Additional Samples of Audit Shield Policies:

Below are additional examples of Audit Shield policies that can be defined for use with K12Docs.

Policy 1: For use with the Student_Records application; identifies active students who are missing a birth certificate, immunization records, and/or registration/demographic information in their folders.

The screenshot shows the 'Policy Editor' tab of the AuditShield application. The 'Application' dropdown is set to 'STUDENT_RECORDS'. The 'Policy Name' is 'Students Missing Papers'. The 'Policy Description' is 'Students missing birth certificate, immunization records, and/or demographics information'. The 'Rules' section shows 'Rule 1' is active. The 'Check Set' and 'Audit Set' sections are visible. In the 'Check Set', 'STUDENT NUMBER', 'STATE STUDENT NUMBER', 'LAST NAME', 'FIRST NAME', 'SCHOOL', 'STATUS' (with 'Active' checked), 'GRADUATION DATE', and 'Document Type' are listed. In the 'Audit Set', 'STUDENT NUMBER', 'STATE STUDENT NUMBER', 'LAST NAME', 'FIRST NAME', 'SCHOOL', 'STATUS', 'GRADUATION DATE', and 'Document Type' are listed. The 'Document Type' dropdown in the 'Audit Set' is open, showing options: 'Archive', 'Birth Certificate' (checked), 'Immunization Records' (checked), 'Legal Papers', 'Miscellaneous', and 'Registration Info/Demographics' (checked).

Policy 2: For use with the Student_Records application; identifies active high school students who are missing transcripts in their folders.

The screenshot shows the 'Policy Editor' tab of the AuditShield application. The 'Application' dropdown is set to 'STUDENT_RECORDS'. The 'Policy Name' is 'HS Students missing transcripts'. The 'Policy Description' is 'High School Students missing transcripts'. The 'Rules' section shows 'Rule 1' is active. The 'Check Set' and 'Audit Set' sections are visible. In the 'Check Set', 'STUDENT NUMBER', 'STATE STUDENT NUMBER', 'LAST NAME', 'FIRST NAME', 'SCHOOL' (with 'Elementary School', 'Graduated Student', and 'High School' listed, and 'High School' checked), 'STATUS' (with 'Active' checked), and 'Document Type' are listed. In the 'Audit Set', 'STUDENT NUMBER', 'STATE STUDENT NUMBER', 'LAST NAME', 'FIRST NAME', 'SCHOOL', 'STATUS', 'GRADUATION DATE', and 'Document Type' are listed. The 'Document Type' dropdown in the 'Audit Set' is open, showing options: 'Legal Papers', 'Miscellaneous', 'Registration Info/Demographics', 'Report Cards', 'Student Work', and 'Transcripts' (checked).

Policy 3: For use with the SUI_PR_Employees application; identifies active employees who are missing a Federal I9 form in their folders.

AuditShield

Policy Editor | Audit Report

Application: SUI_PR_EMPLOYEES

Policy Name: Employees Missing I9

Policy Description: Active employees missing federal I9 form

Buttons: Save Policy, Delete Policy, Run Policy

Rules: Rule 1 | Add | Modify | Remove | Active | Clear Both

Check Set

- EMPLOYEE ID
- LAST NAME
- FIRST NAME
- ACTIVE
 - ☐ No
 - ☒ Yes
- LOCATION
- Subfolders
- Document Description
- Document Date
- Created By
- Leave ID

Audit Set

- Leave ID
- Leave Request Start Date
- Leave Request Key
- Benefits Deductions Doc Type
- Contract Document Type
- Human Resources Document Type
 - ☒ Federal I9
 - ☐ Fingerprint Results
 - ☐ Immunizations
 - ☐ Licenses/Certificates
 - ☐ Military - Certs/Discharge
 - ☐ Performance Evaluation
- Med FMLA Disability Doc Type
- Payroll Document Type
- Transportation Document Type

Policy 4: For use with the SUI_PR_Employees application; identifies active employees who are missing a drivers license in their folders.

AuditShield

Policy Editor | Audit Report

Application: SUI_PR_EMPLOYEES

Policy Name: Missing DL

Policy Description: Employees Missing Drivers License

Buttons: Save Policy, Delete Policy, Run Policy

Rules: Rule 1 | Add | Modify | Remove | Active | Clear Both

Check Set

- EMPLOYEE ID
- LAST NAME
- FIRST NAME
- ACTIVE
 - ☐ No
 - ☒ Yes
- LOCATION
- Subfolders
- Document Description
- Document Date
- Created By

Audit Set

- Document Description
- Document Date
- Created By
- Leave ID
- Leave Request Start Date
- Leave Request Key
- Benefits Deductions Doc Type
- Contract Document Type
- Human Resources Document Type
 - ☐ Background Check
 - ☒ Drivers License
 - ☐ Employee Contact and Policy Form
 - ☐ Employee Info Form
 - ☐ Employment Application
 - ☐ Employment Verifications

Policy 5: For use with the SUI_PR_Employees application; identifies active employees who are missing a Federal and/or State W4 form in their folders.

The screenshot shows the AuditShield Policy Editor window. The 'Application' dropdown is set to 'SUI_PR_EMPLOYEES'. The 'Policy Name' dropdown is 'Employees Missing W4s'. The 'Policy Description' text box contains 'Employees missing a Federal and/or State W4 form'. On the right, there are buttons for 'Save Policy', 'Delete Policy', and 'Run Policy'. Below the policy settings, there is a 'Rules' section with 'Rule 1' selected. The main area is divided into two columns: 'Check Set' and 'Audit Set'. The 'Check Set' column includes fields for 'EMPLOYEE ID', 'LAST NAME', 'FIRST NAME', 'ACTIVE' (with 'Yes' selected), 'LOCATION', 'Subfolders', 'Document Description', 'Document Date', and 'Created By'. The 'Audit Set' column includes fields for 'Contract Document Type', 'Human Resources Document Type', 'Med FMLA Disability Doc Type', 'Payroll Document Type' (with 'W4 - Federal' and 'W4 - State' selected), 'Transportation Document Type', 'Workers Compensation Doc Type', 'Expiration Date', 'Document Status', and 'Claim Number'.

Policy 6: For use with the SUI_PR_Employees application; identifies active employees who are missing a contract with an exact description of **2024-2025 Teacher Contract** in their folders.

The screenshot shows the AuditShield Policy Editor window for Policy 6. The 'Application' dropdown is 'SUI_PR_EMPLOYEES'. The 'Policy Name' dropdown is 'Missing 2024-2025 Teacher Contract'. The 'Policy Description' text box contains 'Employees missing 2024-2025 teacher contract'. The 'Rules' section shows 'Rule 1' selected. The 'Check Set' column includes fields for 'EMPLOYEE ID', 'LAST NAME', 'FIRST NAME', 'ACTIVE' (with 'Yes' selected), 'LOCATION', 'Subfolders', 'Document Description', 'Document Date', 'Created By', 'Leave ID', and 'Leave Request Start Date'. The 'Audit Set' column includes fields for 'EMPLOYEE ID', 'LAST NAME', 'FIRST NAME', 'ACTIVE', 'LOCATION', 'Subfolders', 'Document Description' (with '2024-2025 Teacher Contract' entered), 'Document Date', 'Created By', 'Leave ID', and 'Leave Request Start Date'.

Policy 7: For use with the SUI_AP_Vendors application; identifies active vendors who are missing a W9 form in their folders.

The screenshot shows the AuditShield Policy Editor window. The 'Application' dropdown is set to 'SUI_AP_VENDORS'. The 'Policy Name' is 'Vendors Missing W9'. The 'Policy Description' is 'Vendors missing a completed W9 form'. The 'Check Set' section includes fields for 'VENDOR ID', 'VENDOR NAME', 'CITY', 'STATE', 'ACTIVE' (with 'Yes' selected), 'Subfolders', 'Document Description', 'Document Date', and 'Created By'. The 'Audit Set' section includes fields for 'Document Date', 'Created By', 'Invoice Number', 'Invoice Date', 'Purchase Order Number', 'Purchase Order Date', 'Requisition Number', 'Requisition Date', and 'Document Type' (with 'W9' selected).

Policy 8: For use with the SUI_GL_Documents application; identifies which months in a year are missing a document with an exact description of **Bank Statement** in their subfolders.

Note: For this sample policy, nothing is selected in the Check Set section; and in the Audit Set section, all the subfolders for 01-January through 12-December are selected, in addition to entering a specific document description of **Bank Statement**.

The screenshot shows the AuditShield Policy Editor window. The 'Application' dropdown is set to 'SUI_GL_DOCUMENTS'. The 'Policy Name' is 'Months missing bank statements'. The 'Policy Description' is 'Months missing bank statements'. The 'Check Set' section includes fields for 'YEAR', 'Subfolders', 'Document Description', 'Document Date', and 'Created By'. The 'Audit Set' section includes fields for 'YEAR', 'Subfolders' (with '08-August', '09-September', '10-October', '11-November', and '12-December' selected), 'Document Description' (with 'Bank Statement' entered), and 'Document Date'.

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 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) not 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.

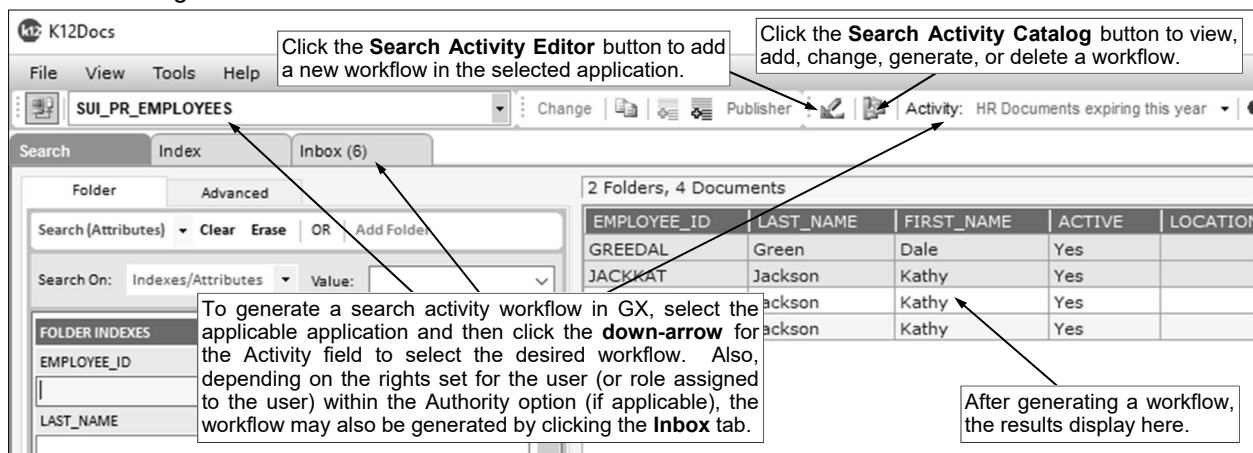


Diagram A

HR Documents expiring this year - Search Activity Builder

Select the application in which to build the workflow.

Applications: SUI_PR_EMPLOYEES

Select a field or option to use in the criteria for the workflow by clicking on it once in the list; then it will be added on the right side of the screen.

EMPLOYEE ID
LAST NAME
FIRST NAME
ACTIVE
LOCATION
Document Description
Document Date
Created By
Leave ID
Leave Request Start Date
Leave Request Key
Benefits Deductions Doc Type
Contract Document Type
Human Resources Document Type

Expiration Date [Date]
Function: between getdate() and getdate()+365

Subfolders
Equals one or more ☐ Not Equals one or more ☐
☐ Prompt
☐ Is Null
☐ Archive
☐ Benefits/Deductions
☐ Contracts
☒ Human Resources
☐ Leave Requests
☐ Medical/FMLA/Disability
☐ Payroll

In this example, a workflow is being created to show all the documents in the Human Resources subfolder in the SUI_PR_Employees application that have an Expiration Date this year, which is based on the date being between the current computer date (determined by using the `getdate()` function) and one year from the current date (determined by using the `getdate()+365` function).

Enter a name and description for the workflow in the applicable fields.

Name: HR Documents expiring this year ☐ New ☐ Use logical OR for conditions

Description: Documents in HR Subfolder expiring this year

Usage: ☐ Private ☒ Public ☐ Public (All Users)

Run Save Close

Diagram B

- For other fields (those that are not 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 not be accessible in K12Docs and must be generated in GX, and also cannot 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.

- Repeat Steps b and c until all the fields and criteria selections have been added.
- 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.
- If desired, enter a longer description for the search activity workflow in the Description field. The description can be up to **256** characters long.
- 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 not 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 be 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 designated 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.

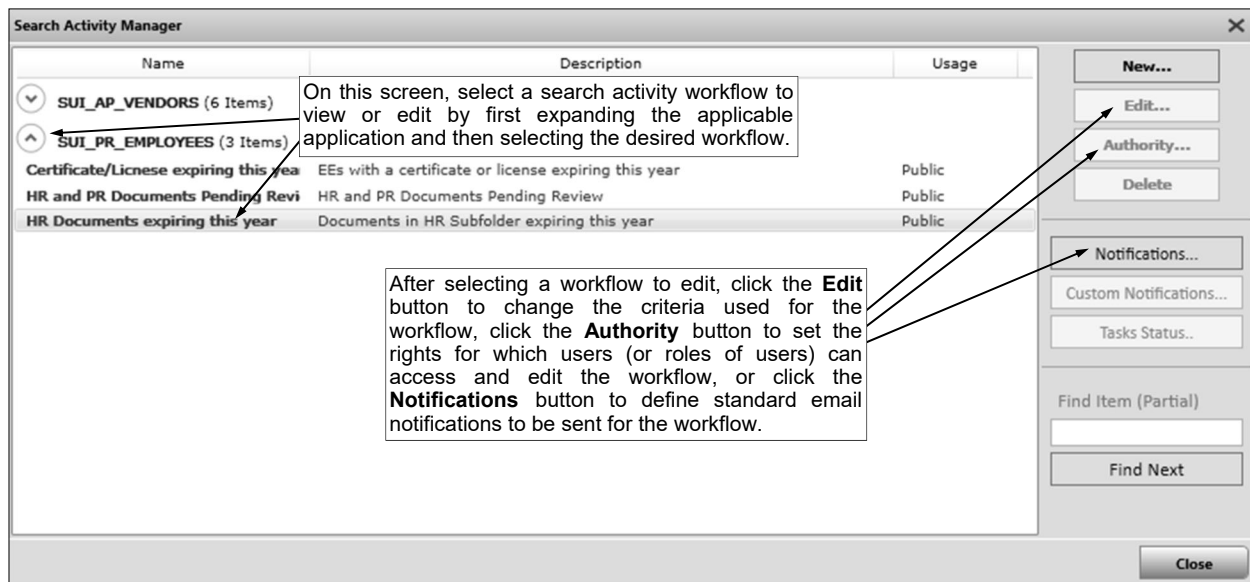


Diagram C

Note: Once a search activity workflow is saved, the Usage field cannot be changed. Also, email notifications cannot 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 not 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 not applicable for search activity workflows with the Usage of **Public (All Users)**, as the workflow will automatically be available under the Activity drop-down

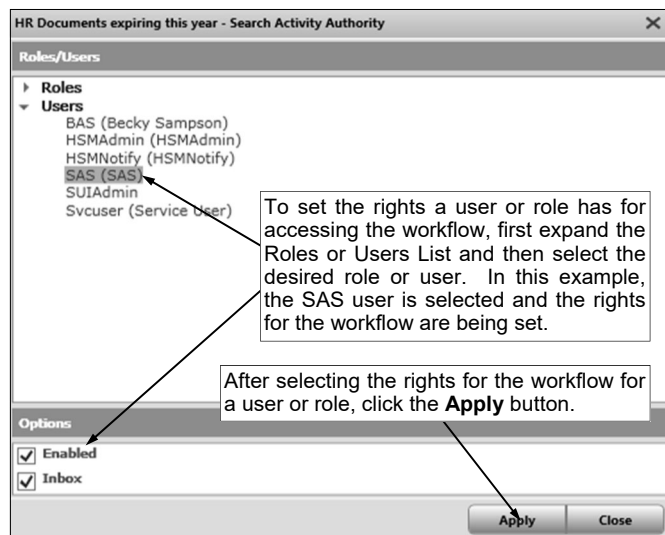


Diagram D

field in GX for all users no matter if the option is selected or not. Also, the **Inbox** option is not 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 cannot 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 lvueServices@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 not 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 not 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.

Changing 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 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 not prompt for one or more values.

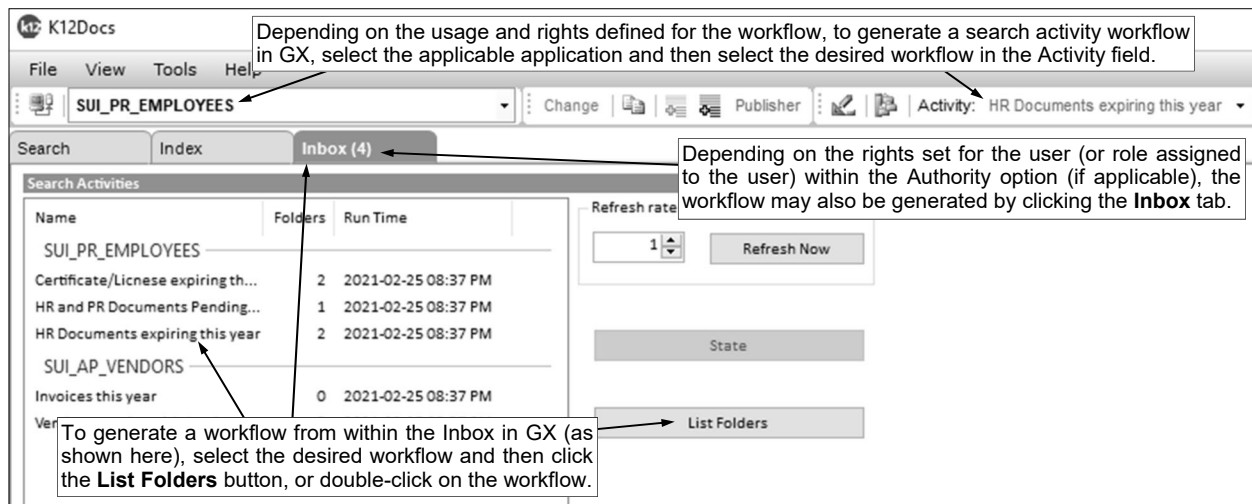
 - a. At the Search Activity Manager screen, click the **down-arrow** to the left of the applicable application which contains the workflow to edit and select the correct workflow by clicking on it once; then click the **Notifications** button.
 - b. Make the desired changes.
 - To remove an email address so a person does not 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 one 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



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**, cannot be generated from within the Inbox (those workflows do not 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).

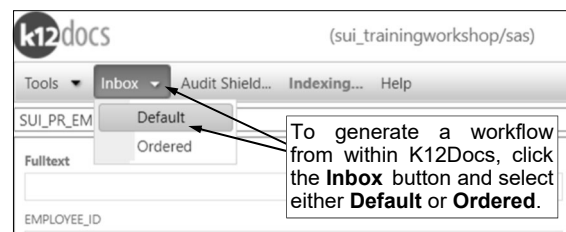


Diagram G

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**, cannot be generated from within the Inbox (those workflows do not display in the Inbox).

- Click once on the desired workflow to generate.
- The main K12Docs screen appears with the results for the selected workflow. See **Diagram I**.
- To view one of the folders or documents within the list of results, click once on the desired item.
- After viewing a folder or document, to return to the list of results, close the K12Docs Portfolio screen (tab).
- Repeat the steps above to generate a different workflow.

Diagram H

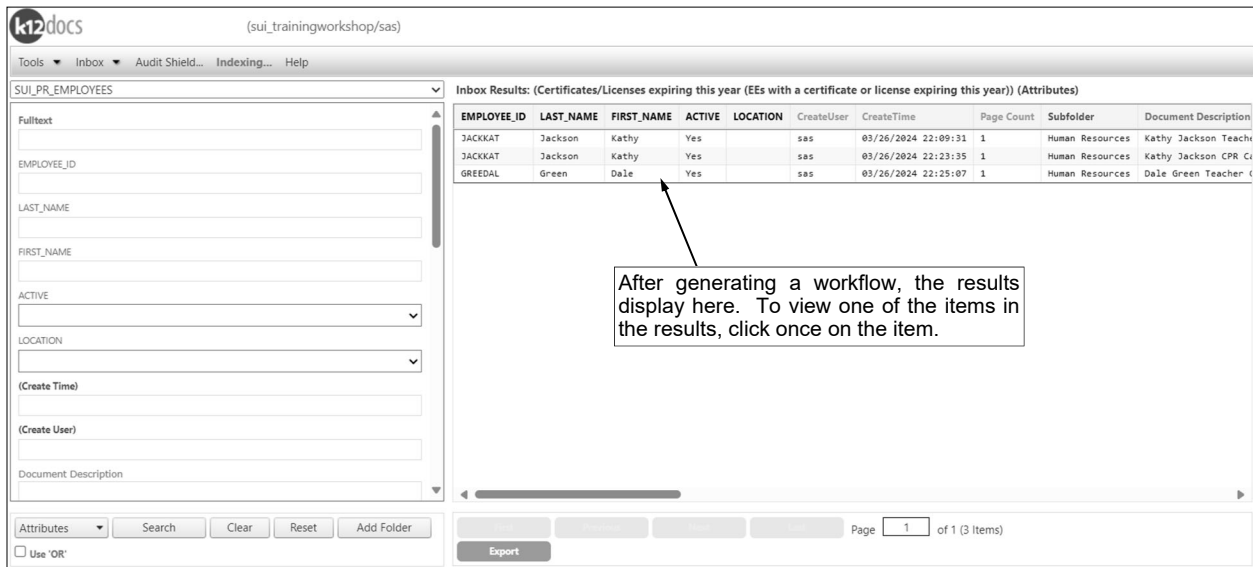
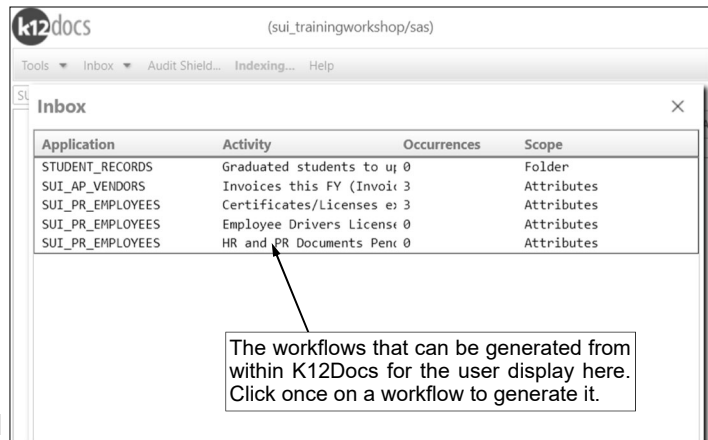


Diagram I

Samples of Search Activity Workflows:

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

Workflow 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**.

HR and PR Documents Pending Review - Search Activity Builder

Applications: SUI_PR_EMPLOYEES

EMPLOYEE ID
LAST NAME
FIRST NAME
ACTIVE
LOCATION
Document Description
Document Date
Created By
Leave ID
Leave Request Start Date
Leave Request Key
Benefits Deductions Doc Type
Contract Document Type
Human Resources Document Type

Document Status
Equals one or more ☒ Not Equals one or more ☐
☐ Prompt
☐ Is Null
☐ Active
☐ Inactive
☒ Pending Review
☐ Reviewed

Subfolders
Equals one or more ☒ Not Equals one or more ☐
☐ Benefits/Deductions
☐ Contracts
☒ Human Resources
In this example, both the Human Resources and the Payroll subfolders are selected, but only the Human Resources one is shown in the diagram.

Name: HR and PR Documents Pending Review ☐ New ☐ Use logical OR for conditions
Description: HR and PR Documents Pending Review
Usage: ☐ Private ☒ Public ☐ Public (All Users)

Run Save Close

Workflow 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.

Certificate/Licnese expiring in 60 days - Search Activity Builder

Applications: SUI_PR_EMPLOYEES

EMPLOYEE ID
LAST NAME
FIRST NAME
ACTIVE
LOCATION
Document Description
Document Date
Created By
Leave ID
Leave Request Start Date
Leave Request Key
Benefits Deductions Doc Type
Contract Document Type
Human Resources Document Type

Human Resources Document Type
Equals one or more ☒ Not Equals one or more ☐
☐ Fingerprint Results
☐ Immunizations
☒ Licenses/Certificates
☐ Military - Certs/Discharge
☐ Performance Evaluation
☐ Physical
☐ Race and Ethnicity Forms
☐ Reference Forms
☐ Resignation Letter

Expiration Date [Date]
Function: between getdate() and getdate()+60

Name: Certificate/Licnese expiring in 60 day ☐ New ☐ Use logical OR for conditions
Description: EEs with a certificate or license expiring in 60 days
Usage: ☐ Private ☒ Public ☐ Public (All Users)

Run Save Close

Workflow 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).

Vendor Invoice Search - Search Activity Builder

Applications: SUI_AP_VENDORS

VENDOR NAME [Literal (100)]
Like ?

Invoice Date [Date]
Between ?

In this example, the ? for the value will prompt for the Vendor Name and Invoice Date range when running the workflow, as shown in the other diagram.

Vendor Invoice Search - Search Activity Prompt

VENDORNAME
Like

Invoice Date
Between Select a date 15
And Select a date 15

Name: Vendor Invoice Search
Description: Search for vendors with invoices in a particular date range
Usage: Private Public Public (All Users)

Run Save Close

Workflow 4: Shows a list of invoices with an Invoice Date in 2021 for active vendors in the SUI_AP_Vendors application.

2021 Invoices - Search Activity Builder

Applications: SUI_AP_VENDORS

VENDOR ID
VENDOR NAME
CITY
STATE
ACTIVE
Document Description
Document Date
Created By
Invoice Number
Invoice Date
Purchase Order Number
Purchase Order Date
Requisition Number
Requisition Date

ACTIVE
Equals one or more Not Equals one or more
Prompt
Is Null
No
Yes

Invoice Date [Date]
Greater Than or Equal 2021-01-01
Less Than or Equal 2021-12-31

Name: 2021 Invoices
Description: Invoices dated in 2021-
Usage: Private Public Public (All Users)

Run Save Close

Workflow 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).

Graduated students to update - Search Activity Builder

Applications: STUDENT_RECORDS

STUDENT NUMBER

STATE STUDENT NUMBER

LAST NAME

FIRST NAME

SCHOOL

STATUS

GRADUATION DATE

Document Type

Document Date

Create Time

Create User

Content Type

Bookmark

Note

STATUS

Equals one or more ☐ Not Equals one or more

☐ Prompt

☐ Is Null

☒ Active

☐ Graduated

☐ Transferred Out

GRADUATION DATE [Date]

Function

SCHOOL

Equals one or more ☐ Not Equals one or more

☐ Prompt

☐ Is Null

In this example, High School is selected for the School index field but is not shown in the diagram.

Name: Graduated students to update ☐ New ☐ Use logical OR for conditions

Description: Active students who have now graduated and need statu

Usage: ☐ Private ☒ Public ☐ Public (All Users)

Run Save Close

Workflow 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).

7 Year Retention Policy - Search Activity Builder

Applications: SUI_PR_PAYEES

PAYEE ID

PAYEE NAME

CITY

STATE

ACTIVE

TYPE LIN TEST

Document Description

Document Date

Created By

Subfolders

Create Time

Create User

Content Type

Bookmark

Document Date [Date]

Function

Name: 7 Year Retention Policy ☐ New ☐ Use logical OR for conditions

Description: Payee Documents that have reached the end of their 7-y

Usage: ☐ Private ☒ Public ☐ Public (All Users)

Run Save Close

Workflow 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 blank.

Employees missing signed teacher contract - Search Activity Builder

Applications: SUI_PR_EMPLOYEES

EMPLOYEE ID
LAST NAME
FIRST NAME
ACTIVE
LOCATION
Document Description
Document Date
Created By
Leave ID
Leave Request Start Date
Leave Request Key
Benefits Deductions Doc Type
Contract Document Type
Human Resources Document Type

Document Description [Literal (100)]
Equal 2024-2025 Teacher Contract

Contract Document Type
Equals one or more ☐ Not Equals one or more
☐ Prompt
☐ Is Null
☒ Contract - Employment
☐ Contract - Extracurricular
☐ Contract - Summer

Employee Signature
Equals one or more ☐ Not Equals one or more
☐ Prompt
☒ Is Null
☒ Not Signed
☐ Signed

School Staff Signatures
Equals one or more ☐ Not Equals one or more
☐ Prompt
☒ Is Null
☒ Not Signed
☐ Signed

Name: Employees missing signed teacher contract ☐ New ☐ Use logical OR for conditions
Description: EEs missing signatures on 2024-2025 teacher contract
Usage: ☐ Private ☒ Public ☐ Public (All Users)

Run Save Close

K12Docs GX

Logging into GX:

Note: If needed, the instructions to install GX can be accessed at: <https://docs.su-inc.com/support/K12DocsGXInstallation.pdf>.

1. Open the GX application by double-clicking the shortcut on your desktop.
2. At the Login to Service Provider screen (see **Diagram A**), enter the following information:
 - Enter your user name for accessing the K12Docs module in the User Name field.
 - Enter your valid password for accessing the K12Docs module in the Password field. Remember the password is case sensitive.

3. Click the **Login** button.

Note: If needed, enter the correct configuration information for the GX application. To access the configuration information, select the **File** menu from within GX and then **Configure**. In the URL field, enter <https://intellicloud1.intellinetics.com/k12docs/IntellivueWebAPI>, and in the Domain field, enter the K12Docs domain assigned to your organization by Software Unlimited, Inc. See **Diagram B**.

Diagram A

Diagram B

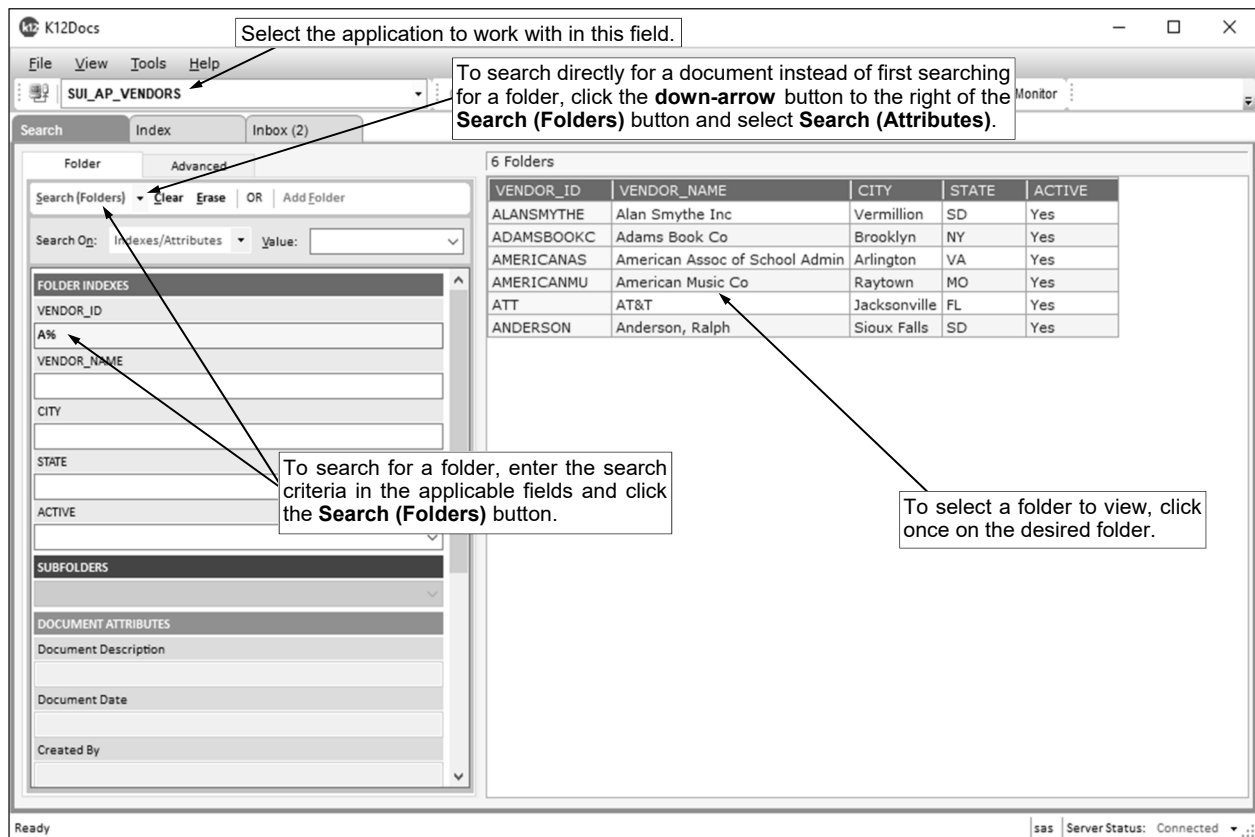
Viewing a Document:

1. On the main screen in GX (see **Diagram C**), select the desired application for which to view the document by clicking the **down-arrow** button for the Application field and choosing the correct one. For example, to view a document for a vendor, select the **SUI_AP_VENDORS** application; to view a document for an employee, select the **SUI_PR_EMPLOYEES** application; or to view a document for a student, select the **STUDENT_RECORDS** application, etc.
2. Click the **Search** tab if it is not already selected and then click the **Folder** tab underneath it.
3. The folder indexes for the specified application appear on the left side of the screen, with the document attributes displayed under the indexes. By default, the search setting for **Search (Folders)** is selected but can be changed to **Search (Attributes)** instead in order to search for a specific document, if desired. See **Diagram C**.
4. Search for and select the desired folder and then locate the document to view, or search directly for the desired document from the main screen.

Searching for a folder and locating the document:

- a. With the search setting of **Search (Folders)** selected, enter the criteria on which to search in the desired 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: Use a wildcard character, such as the percent sign (%), as a placeholder in your variable search information for the indexes. The percent sign (%) is a placeholder for an unlimited number of characters. For example, enter **G%** in the EMPLOYEE_ID index field (within the SUI_PR_EMPLOYEES application) to view the folders for all employees defined with an ID starting with the letter G; enter **%OFFICE%** in the VENDOR_NAME index field (within the SUI_AP_VENDORS application) to view the folders for all vendors with the word "Office" as part of their name; or enter **G%** in the LAST_NAME index field (within the STUDENT_RECORDS application) to view the folders for all students with a last name starting with the letter G.



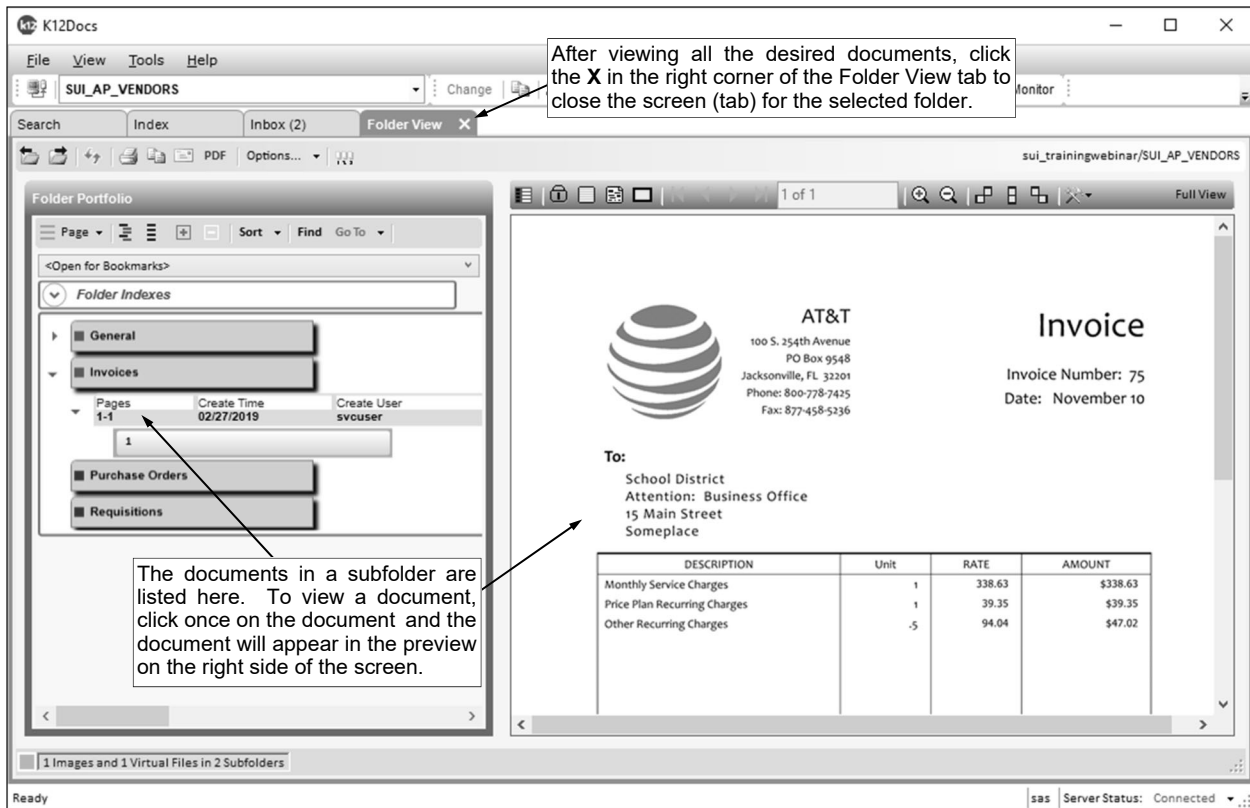
- Click the **Search (Folders)** button located above the list of folder indexes (under the Folder tab).
- The folders matching the specified criteria display on the right side of the screen.
- Select a folder to view (or open) by clicking once on the desired record.
- A new tab will open for the specified folder.
- The subfolders for the selected folder display on the screen. See **Diagram D**. The subfolders that contain documents appear with a green box to the left of the label, while the subfolders that are empty (do not contain any documents) appear with a red box to the left of the label.
- Select a subfolder to view (or open) by clicking once on the arrow to the left of the subfolder or double-clicking on the subfolder name.
- The document attributes for each document included in the subfolder appear.
- Select the document to view (or open) by clicking once on the desired record.

Searching directly for a document from the main screen:

- Change the search setting from **Search (Folders)** to be **Search (Attributes)** by clicking the **down-arrow** button to the right of the **Search (Folders)** button and selecting **Search (Attributes)**. See **Diagram C**.
- Enter the criteria on which to search in the desired folder index and/or document attribute fields, or if applicable, click the **down-arrow** button to select the correct criteria for a particular field. Leave all the index and attribute fields blank to view all the documents within all the folders in the application.

Tip: Use a wildcard character, such as the percent sign (%), as a placeholder in your variable search information for the indexes. The percent sign (%) is a placeholder for an unlimited number of characters.

- Click the **Search (Attributes)** button located above the list of folder indexes and document attributes (under the Folder tab).
- The documents matching the specified criteria will appear on the right side of the screen.
- Select a document to view (or open) by clicking on the desired record.
- A new tab will open for the specified folder and document.



- The document will appear in the preview screen on the right side of the screen. See **Diagram D**.
- After viewing all the desired documents, click the X in the right corner of the Folder View tab to close the screen (tab) for the selected folder.

Deleting Notes from Documents in GX:

- Within GX, search for and select to view the document containing the note to delete.
- The selected document displays in the preview screen on the Folder View tab.
- If the document is a .TIFF file and is multiple pages long, advance to the page containing the note to delete.

Note: A note for a document that is a .TIFF file is saved by page, whereas a note for documents of all other file types are saved as part of the whole document (not by a particular page).

- Click the **Bookmark/Notes** button located at the top of the preview screen. See **Diagram E**.
- The Page - Bookmark/Notes section appears. See **Diagram F**.
- Click the **down-arrow** button to the right of the **Delete Bookmark/Notes** button and select **Notes**.

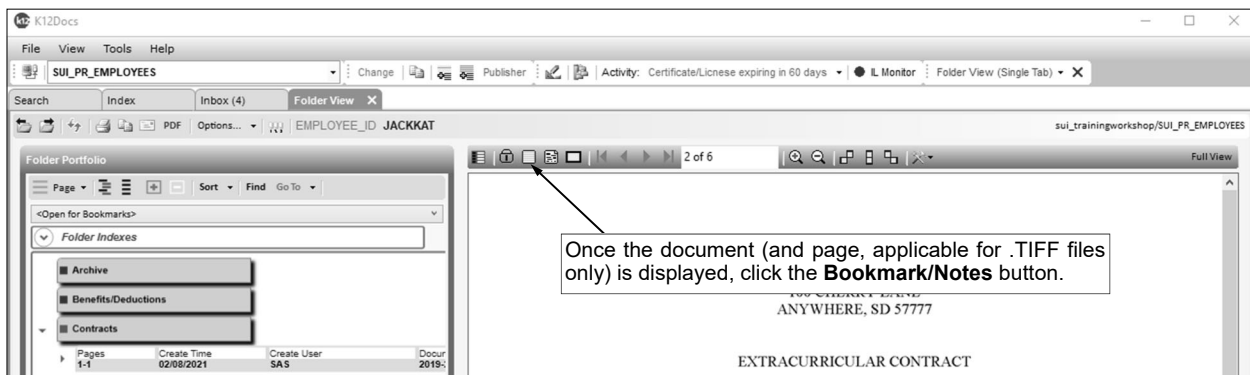


Diagram E

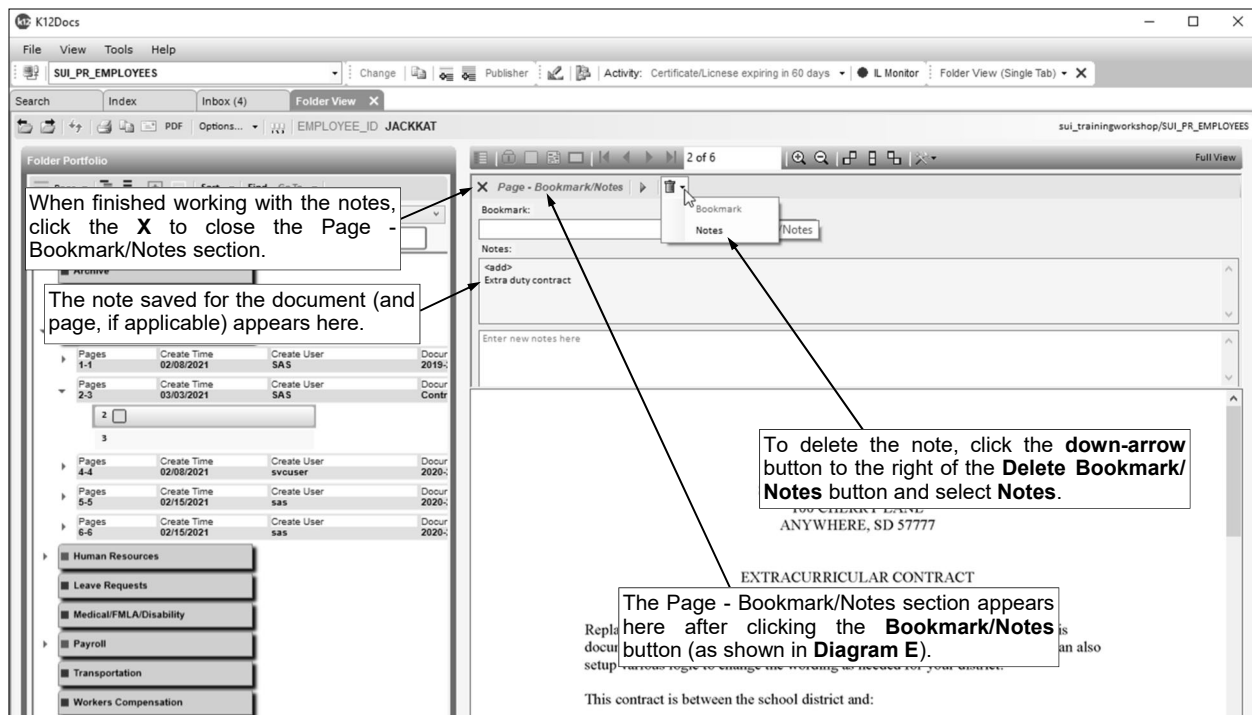


Diagram F

7. When prompted to delete the note, click **Yes**.
8. Click the **X** in the upper left corner of the Page - Bookmark/Notes section to close the section.

Deleting Notes from Folders in GX:

1. Within GX, search for and select the folder containing the note to delete.
2. On the Folder View tab, right-click on the Folder Indexes bar located on the left side of the screen (above the list of subfolders) and select **Notes**. See **Diagram G**.
3. The Folder - Bookmark/Notes section appears. See **Diagram H**.
4. Click the **down-arrow** button to the right of the **Delete Bookmark/Notes** button and select **Notes**.
5. When prompted to delete the notes, click **Yes**.
6. Click the **X** in the upper left corner of the Folder - Bookmark/Notes section to close the section.

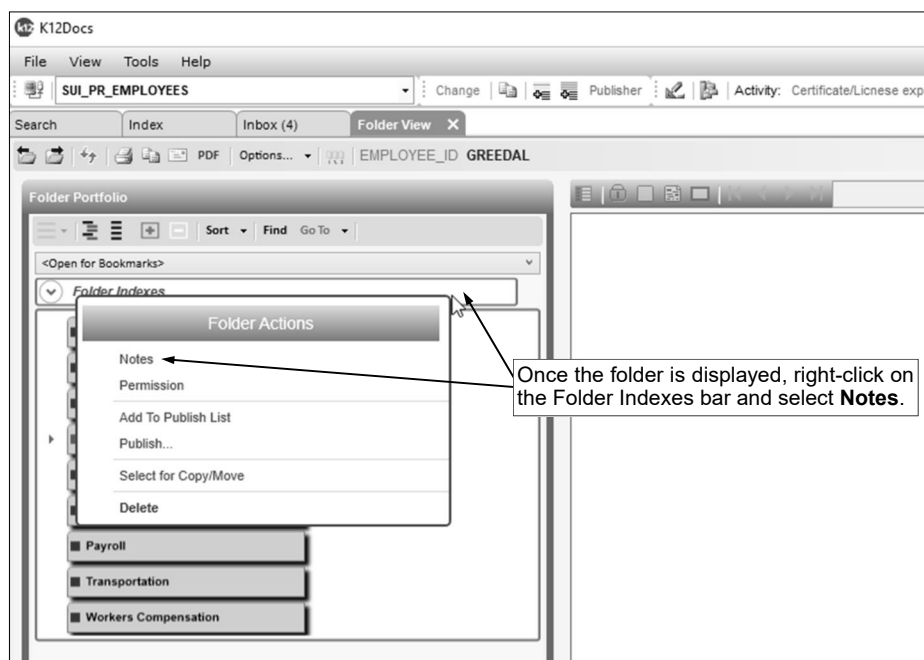


Diagram G

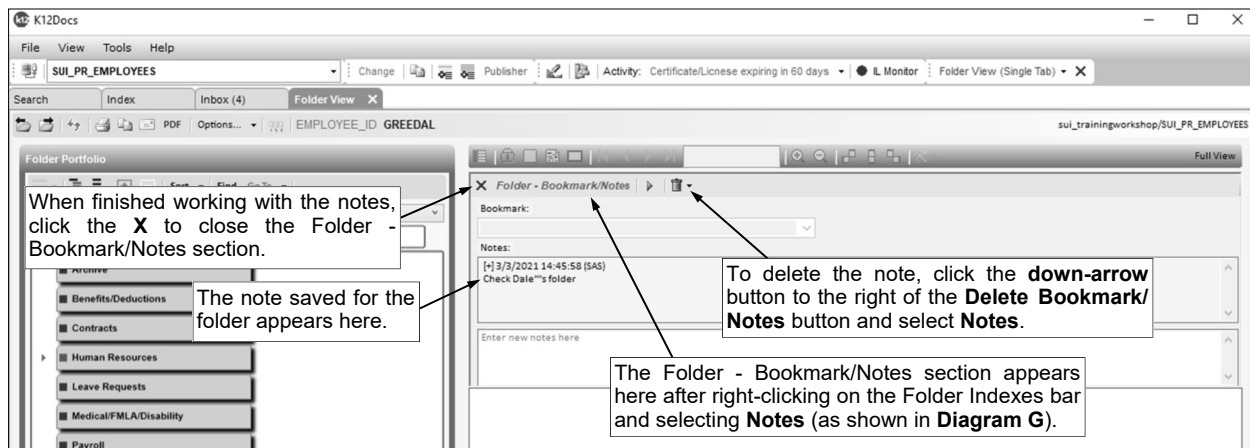


Diagram H

Adding Indexes, Attributes, and Subfolders in Host Site Manager

Applications in K12Docs can be customized by adding folder indexes, document attributes, and/or subfolders from within the Host Site Manager application, as desired. Access the Host Site Manager application at: <https://intellicloud1.intellinetics.com/K12Docs/hsm>.

Tip: Keep in mind, new folder indexes and document attributes can be added to an application from within the Host Site Manager application but cannot be deleted from within the Host Site Manager application. If a newly added folder index or document attribute field needs to be deleted, contact Customer Support at Software Unlimited, Inc. for assistance. Subfolders can be added and deleted from within the Host Site Manager application as needed, if the application was configured to use subfolders when initially defined.

Note: Only K12Docs users who are defined with an administrator role can log into the Host Site Manager application.

Adding a Folder Index Field to an Application:

1. Log into the Host Site Manager application.

Note: Only K12Docs users who are defined with an administrator role can log into the Host Site Manager application.

2. From within the Application Management section located on the left side of the main Host Site Manager screen, click once on the application for which to edit. See **Diagram A**.
3. The record for the selected application will expand.
4. Click once on the **Add/Modify Folder Index** option.
5. At the Add/Modify Folder Indexes screen for the selected application, click the **New** button. See **Diagram B**.
6. Verify **No Selection** displays in the Indexes List field and then complete the following information:
 - a. Enter a description to use as the label for the index field in the Index Name field. The name can be alphanumeric and up to **30** characters long.

Note: The name must be unique within the specified application (cannot be the same name as another index field for that application).

Tip: Spaces can be entered in the name but will be converted to underscores once the index field is saved. Also, the letters will be converted to all uppercase. For example, if **Field Label** is entered in the Index Name field, it will be converted to **FIELD_LABEL** once the index field is saved.

- b. In The Type Of Information In This Index Is field, click the **down-arrow** button and select the correct type of the index field: **Text**, **Text (containing alpha only)**, **Text (containing numbers)**

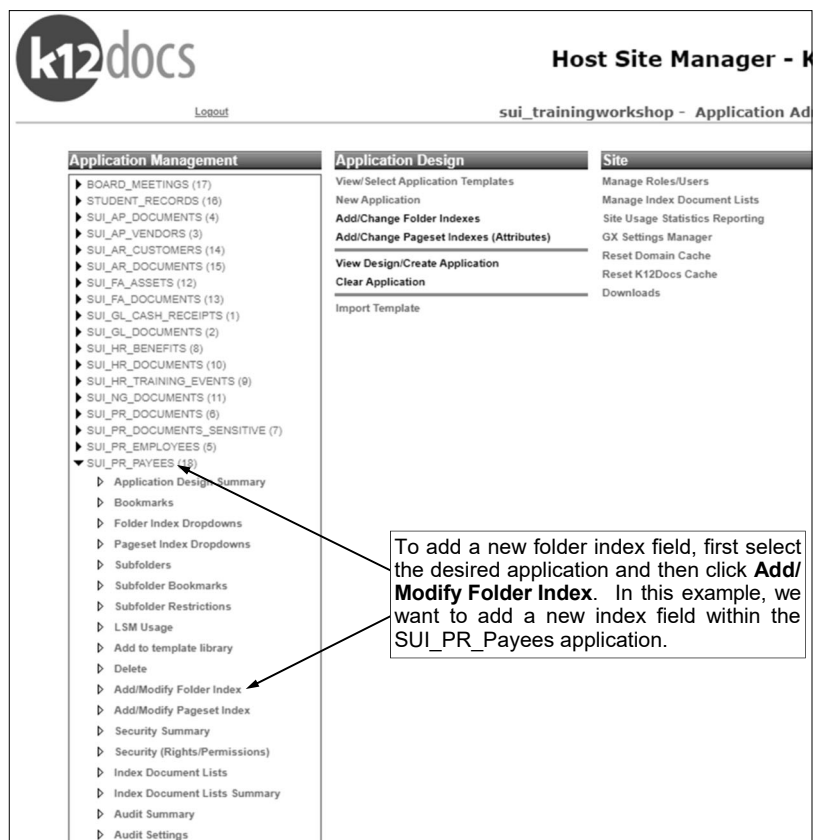


Diagram A

SUI_PR_PAYEES (132) - Add/Modify Folder Indexes

Indexes List No Selection

Name and Type

Index name:

The type of information in this index is: Dropdown

Maximum number of characters:

The mask or (regular expression) for input validation:

Default value:

Comment: (Validation Fail)

Input Settings

Require that this index contains information: ☐ Yes ☒ No

Is the information stored in this index modifiable: ☒ Yes ☐ No

Store Option

☐ Duplicate information is not allowed

☒ Allow this information to be fast searched

☐ This index is part of a group (Composite)

Additional Settings

Is this dropdown authority based: ☐ Yes ☒ No

Zoom Zone

All values must be in inches. Values will be rounded to two decimal places:

X: Y: Height: Width:

When adding a new index field, verify **No Selection** displays in the Indexes List field, as shown here.

In this example, a new index field called "Payee Type" is being added to the SUI_PR_Payees application and will be a drop-down list.

After entering all the information for the new index field, click the **Add** button to save the changes.

Diagram B

only), **Text (validated using a mask)**, **Number**, **Dropdown**, **DateTime**, or **Currency**. By default, **Text** is selected but can be changed.

Tip: Select **Text (validated using a mask)** as the type in order to enter a custom mask (or expression) to use as the format for the index field (with the mask or expression entered below in The Mask or (Regular Expression) for Input Validation field); for example, select this type in order to create a format for a social security number index field with a mask of 999-99-9999.

- c. Enter the maximum number of characters to use for the values that can be keyed into the index field in K12Docs or GX in the Maximum Number Of Characters field. This field is disabled if **DateTime** or **Currency** is selected as the index field type.
- d. The Mask Or (Regular Expression) For Input Validation field is only enabled if **Text (validated using a mask)** is selected as the index field type. If applicable, enter the custom mask (or expression) to use as the format for the index field in K12Docs or GX in The Mask (Or Regular Expression) For Input Validation field; for example, enter **999-99-9999** as the mask for a social security number index field.
- e. If desired, in the Default Value field, enter the information to use as the default in the index field when adding a new folder in K12Docs or GX if the index field is not completed.
- f. If desired, in the Comment (Validation Fail) field, enter a message to display when the data entered in the index field does not meet the field requirements, such as for the length or format, when indexing and filing documents from a list in GX or editing folder indexes in GX.
- g. For the Require That This Index Contains Information field, select **Yes** to have the index field required (must be completed) when adding a new folder in K12Docs or GX, or select **No** to have the index field not required (can be left blank). By default, **No** is selected but can be changed.
- h. For the Is The Information Stored In This Index Modifiable field, select **Yes** to allow the index field to be edited for a folder in K12Docs or GX, or select **No** to not allow the index field to be edited for a folder. By default, **Yes** is selected but can be changed.
- i. If applicable, select one of the following options in the Store Option section (or leave all options unselected): **Duplicate Information Is Not Allowed**, **Allow This Information To Be Fast Searched**, or **This Index Is Part Of A Group (Composite)**. Select **Duplicate Information Is Not Allowed** to require unique information to be entered into the index field for the folders within the application in K12Docs or GX. Select **Allow This Information To Be Fast Searched** to have the index field be part of search indexes within the database (behind the scenes) to speed up searching (**Tip:** Selecting this option creates overhead in the database that can cause speed issues with using K12Docs or GX if the option is selected for numerous index fields within an application.). Select **This Index Is Part Of A Group (Composite)** if the index field is to be used in conjunction with another index field to create a unique folder (**Note:** Typically this option is not used.).

- j. The Is This Dropdown Authority Based field is only enabled if the application was defined to permit authority based folder index dropdowns (a setting selected when the application was initially created) and **Dropdown** is selected as the index field type. If applicable, for the Is This Dropdown Authority Based field, select **Yes** to allow the index field to be tied to rights and permissions based on a particular look up value defined for the index field, or select **No** to not have the index field tied to rights and permissions. By default, **No** is selected but can be changed. For example, the Location index field in the SUI_PR_EMPLOYEES application has this field selected in order to tie rights and permissions for folder access by users (or roles of users) for only employees in a certain location, such as Elementary, Middle School, or High School, if desired; and the School index field in the STUDENT_RECORDS application has this field selected in order to tie rights and permissions for folder access by users (or roles of users) for only students in a certain school, such as Elementary School or High School, if desired.
 - k. If desired, complete the Zoom Zone section to zoom to a certain location on a document when indexing documents in GX. If applicable, enter the appropriate values in the X, Y, Height, and Width fields. Typically, these fields are only completed by organizations doing a very high volume of indexing from lists in GX (such as scanning centers).
7. Click the **Add** button.
 8. If needed, repeat Steps 5-7 to add additional index fields for the application.
 9. After adding all the desired index fields to the application, click the **OK** button in the lower right-hand corner to close the Add/Modify Folder Indexes screen for the specified application and return to the main Host Site Manager screen.
 10. Click the **Reset K12Docs Cache** option under the Site section located on the right side of the main Host Site Manager screen to refresh the application in order to have the changes update immediately.
 11. If a new index field was defined with **Dropdown** as the index field type, define the values to be available within the drop-down list for the index field when adding or editing a folder in K12Docs or GX; refer to the Adding New Values to a Folder Index Drop-Down List section below for detailed instructions.

Adding New Values to a Folder Index Drop-Down List:

1. Log into the Host Site Manager application.

Note: Only K12Docs users who are defined with an administrator role can log into the Host Site Manager application.

2. From within the Application Management section located on the left side of the main Host Site Manager screen, click once on the application for which to edit.
3. The record for the selected application will expand.
4. Click once on the **Folder Index Dropdowns** option.
5. At the Manage Folder Index Dropdowns screen for the selected application, click once on the index field for which to edit the values in the Entity List. See **Diagram C**.

Diagram C

6. The current values defined for the selected folder index drop-down list appear in the Current Values section.
 7. To add a new value, enter the description to use as the value in the New Values field and then click the **Add** button.
 8. The newly added value will appear at the bottom of the list in the Current Values section.
- Note:** The defined values will be listed in alphabetical order after refreshing the screen within Host Site Manager and also when completing the index field for a folder.

9. Repeat Steps 7 and 8 until all the new values have been added.
10. Click the **Close** button in the lower right-hand corner to close the Manage Folder Index Dropdowns screen and return to the main Host Site Manager screen.
11. Click the **Reset K12Docs Cache** option under the Site section located on the right side of the main Host Site Manager screen to refresh the drop-down lists and have the new values update immediately.

Adding a Document Attribute Field to an Application:

1. Log into the Host Site Manager application.

Note: Only K12Docs users who are defined with an administrator role can log into the Host Site Manager application.

2. From within the Application Management section located on the left side of the main Host Site Manager screen, click once on the application for which to edit. See **Diagram D**.

3. The record for the selected application will expand.
4. Click once on the **Add/Modify Pageset Index** option.
5. At the Add/Modify Pageset Indexes screen for the selected application, click the **New** button. See **Diagram E**.

6. Verify **No Selection** displays in the Added Indexes List field and then complete the following information:

- a. Enter a description to use as the label for the attribute field in the Index Name field. The name can be alphanumeric and up to **100** characters long.

Note: The name must be unique within the specified application (cannot be the same name as another attribute field for that application).

- b. In The Type Of Information In This Index Is field, click the **down-arrow** button and select the correct type of the attribute field: **Text**, **Dropdown (a list of preset values)**, **Yes/No (a choice of yes or no)**, **Number (Int8)**, **Number (Int16)**, **Number (Int32)**, **DateTime**, or **Currency**. By default, **Text** is selected but can be changed.

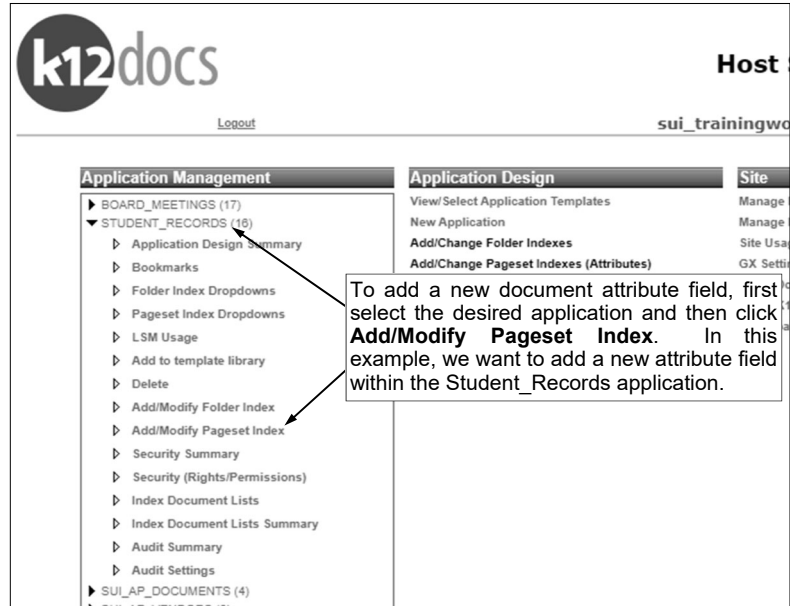


Diagram D

STUDENT_RECORDS (30) - Add/Modify Pageset Indexes

Added Indexes List | No Selection

Name and Type

Index name:

The type of information in this index is:

Maximum number of characters:

Default value:

Additional Settings

Require that this index contains information: ☐ Yes ☒ No

Where is this index visible: ☒ Indexing ☒ Search/Retrieval

Where is this index modifiable: ☒ Indexing ☒ Search/Retrieval

Change display ordering... |

When adding a new attribute field, verify **No Selection** displays in the Added Indexes List field, as shown here.

In this example, a new attribute field called "Document Status" is being added to the Student_Records application and will be a drop-down list.

After entering all the information for the new attribute field, click the **Add** button to save the changes.

If desired, click the **Change Display Ordering** button to change the order in which the attribute fields display in K12Docs and GX.

Diagram E

Tip: Select **Number (Int8)** as the type if the attribute field should be a numeric field with a maximum of 8 digits. Select **Number (Int16)** as the type if the attribute field should be a numeric field with a maximum of 16 digits. Select **Number (Int32)** as the type if the attribute field should be a numeric field with a maximum of 32 digits.

- c. The Maximum Number Of Characters field is only enabled if **Text** is selected as the attribute field type. If applicable, enter the maximum number of characters to use for the values that can be keyed into the attribute field in K12Docs or GX in the Maximum Number Of Characters field.
 - d. If desired, in the Default Value field, enter the information to use as the default in the attribute field when adding a new document in K12Docs or GX.
 - e. For the Require That This Index Contains Information field, select **Yes** to have the attribute field required (must be completed) when adding a new document in K12Docs or GX, or select **No** to have the attribute field not required (can be left blank). By default, **No** is selected but can be changed.
 - f. For the Where Is This Index Visible field, select the options (**Indexing** and/or **Search/Retrieval**) for where the attribute field will display. Select **Indexing** to display the attribute field when adding a new document in K12Docs or GX. Select **Search/Retrieval** to display the attribute field when viewing or editing attributes while previewing a document in K12Docs or GX. A checkmark will appear in the box if an option is selected. By default, both options are selected and typically left selected.
 - g. For the Where Is This Index Modifiable field, select the options (**Indexing** and/or **Search/Retrieval**) for where the attribute field can be edited (completed or changed). Select **Indexing** to allow the attribute field to be edited when adding a new document in K12Docs or GX. Select **Search/Retrieval** to allow the attribute field to be edited when viewing or editing attributes while previewing a document in K12Docs or GX. A checkmark will appear in the box if an option is selected. By default, both options are selected and typically left selected.
7. Click the **Add** button.
 8. If needed, repeat Steps 5-7 to add additional attribute fields for the application.
 9. After adding all the desired index fields to the application, if desired, click the **Change Display Ordering** button to change the order in which the attribute fields display in K12Docs and GX. At the Change Pageset Index Ordering screen, click on an attribute field to move and then click the **Move Selected Item Up** button or the **Move Selected Item Down** button until the field is in the desired position. Then click the **Modify** button to save the changes.
 10. Click the **Close** button in the lower right-hand corner to close the screen and return to the main Host Site Manager screen.
 11. Next, select the subfolders that will utilize (display) the new document attribute field(s) for the particular application by completing the following:
 - a. Under the expanded record for the selected application, click once on the **Subfolders** option.
 - b. At the Manage Subfolders screen for the selected application, click once on the desired subfolder from the Subfolders List (in the lower left corner of the screen) for which to add the attribute field(s).
 - c. The name of the selected subfolder will display in the Subfolder Name field at the top of the screen.
 - d. In the Optional: Associated Pageset Indexes (Attributes) List in the lower right corner of the screen, select the attribute fields to display when adding documents to the specified subfolder. A checkmark will appear in the box if a field is selected. To select all of the attribute fields, click the **Select All** button. To clear all the previously selected attribute fields, click the **Clear Selection** button.
 - e. Click the **Update** button to save the changes.
 - f. Click the **Close** button in the lower right-hand corner to close the screen and return to the main Host Site Manager screen.
 12. Click the **Reset K12Docs Cache** option under the Site section located on the right side of the main Host Site Manager screen to refresh the application in order to have the changes update immediately.
 13. If the new attribute field was defined with **Dropdown** as the attribute field type, define the values to be available within the drop-down list for the attribute field when adding a new document or editing

the attributes for a document in K12Docs or GX; refer to the Adding New Values to a Document Attribute Drop-Down List section below for detailed instructions.

Adding New Values to a Document Attribute Drop-Down List:

1. Log into the Host Site Manager application.

Note: Only K12Docs users who are defined with an administrator role can log into the Host Site Manager application.

2. From within the Application Management section located on the left side of the main Host Site Manager screen, click once on the application for which to edit.
3. The record for the selected application will expand.
4. Click once on the **Pageset Index Dropdowns** option.
5. At the Manage Pageset Index Dropdowns screen for the selected application, click once on the document attribute field for which to edit the values in the Entity List. See **Diagram F**.

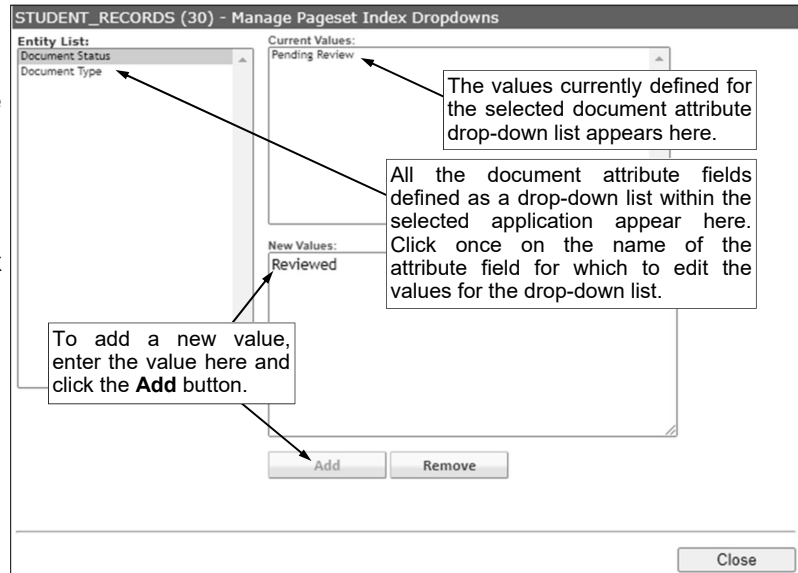


Diagram F

6. The current values defined for the selected document attribute drop-down list appear in the Current Values section.
7. To add a new value, enter the description to use as the value in the New Values field and then click the **Add** button.
8. The newly added value will appear at the bottom of the list in the Current Values section.
- Note:** The defined values will be listed in alphabetical order after refreshing the screen within Host Site Manager and also when completing the attribute field for a folder.
9. Repeat Steps 7 and 8 until all the new values have been added.
10. Click the **Close** button in the lower right-hand corner to close the Manage Pageset Index Dropdowns screen and return to the main Host Site Manager screen.
11. Click the **Reset K12Docs Cache** option under the Site section located on the right side of the main Host Site Manager screen to refresh the drop-down lists and have the new values update immediately.

Adding a Subfolder to an Application:

1. Log into the Host Site Manager application.

Note: Only K12Docs users who are defined with an administrator role can log into the Host Site Manager application.

2. From within the Application Management section located on the left side of the main Host Site Manager screen, click once on the application for which to edit. See **Diagram G**.
3. The record for the selected application will expand.
4. Click once on the **Subfolders** option.

Note: The Subfolders option only appears for an application if the application was configured to use subfolders when initially defined.

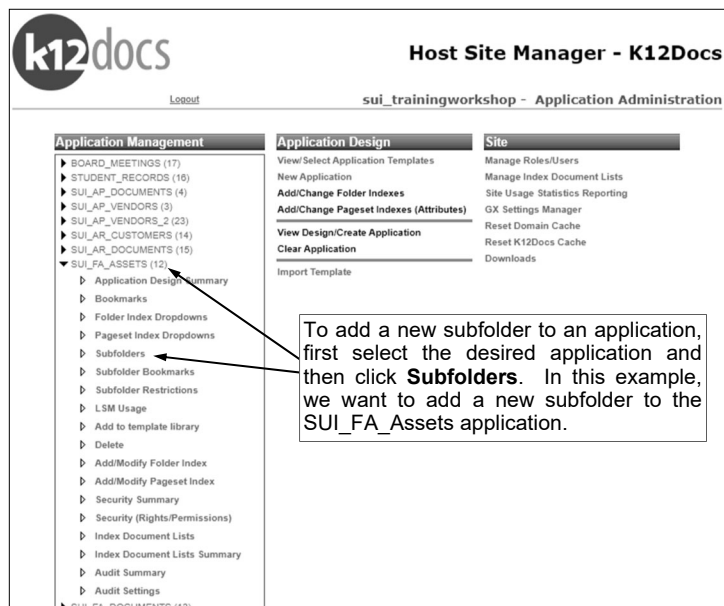


Diagram G

SUI_FA_ASSETS - Manage Subfolders

Name and Type

Subfolder name: Forms

Is content allowed?
☒ Yes ☐ No

New Add Modify Remove

Subfolders

General

Optional: Associated Pageset Indexes (Attributes)

☒ Document Description
☒ Document Date
☒ Created By

Select All Clear Selection Update

Close

In this example, a new subfolder named "Forms" is being added to the SUI_FA_Assets application and will allow documents to be uploaded to it.

After entering all the information for the new subfolder, click the **Add** button to save the changes.

The subfolders currently defined for the application display here.

5. At the Manage Subfolders screen for the selected application, click the **New** button. **Diagram H**
See **Diagram H**.
6. Enter a name for the subfolder in the Subfolder Name field. The name can be alphanumeric and up to **50** characters long.
7. For the Is Content Allowed? field, select **Yes** to allow documents to be added (uploaded) to the subfolder, or click **No** to not allow documents to be added to the subfolder. By default, **Yes** is selected but can be changed.
Tip: Typically, **Yes** is selected in most cases when adding a subfolder.
8. Click the **Add** button.
9. Next, select the document attribute fields to utilize when adding documents to the subfolder by completing the following:
 - a. Click once on the newly added subfolder from the Subfolders List (in the lower left corner of the screen).
 - b. Verify the name of the selected subfolder displays in the Subfolder Name field at the top of the screen and the **Modify** button and the **Remove** button are enabled.
 - c. In the Optional: Associated Pageset Indexes (Attributes) List in the lower right corner of the screen, select the attribute fields to display when adding documents to the specified subfolder. A checkmark will appear in the box if a field is selected. To select all of the attribute fields, click the **Select All** button. To clear all the previously selected attribute fields, click the **Clear Selection** button.
 - d. Click the **Update** button to save the changes.
10. Click the **Close** button in the lower right-hand corner to close the screen and return to the main Host Site Manager screen.
11. Click the **Reset K12Docs Cache** option under the Site section located on the right side of the main Host Site Manager screen to refresh the application in order to have the changes update immediately.

Deleting a Subfolder from an Application:

Note: Only subfolders which are empty can be deleted from an application. If there are documents saved within a subfolder for one or more records (folders), the documents must first be deleted in order to delete the subfolder.

1. Log into the Host Site Manager application.
Note: Only K12Docs users who are defined with an administrator role can log into the Host Site Manager application.
2. From within the Application Management section located on the left side of the main Host Site Manager screen, click once on the application for which to delete the subfolder.
3. The record for the selected application will expand.
4. Click once on the **Subfolders** option.
Note: The Subfolders option only appears for an application if the application was configured to use subfolders when initially defined.
5. At the Manage Subfolders screen for the selected application, click once on the subfolder to delete from the Subfolders List (in the lower left corner of the screen).
6. The name of the selected subfolder will display in the Subfolder Name field at the top of the screen.

7. Click the **Remove** button to delete the subfolder.
8. Click the **Close** button in the lower right-hand corner to close the screen and return to the main Host Site Manager screen.
9. Click the **Reset K12Docs Cache** option under the Site section located on the right side of the main Host Site Manager screen to refresh the application in order to have the changes update immediately.