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.

    Note: Typically, the GX application is installed on the computer of those who will be using GX for advanced options, but it can be installed on as many computers as needed.

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

Enter the applicable information into the appropriate fields and click the **Login** button.

Diagram B

Enter the URL as shown and the domain assigned to your organization; then click **OK**.
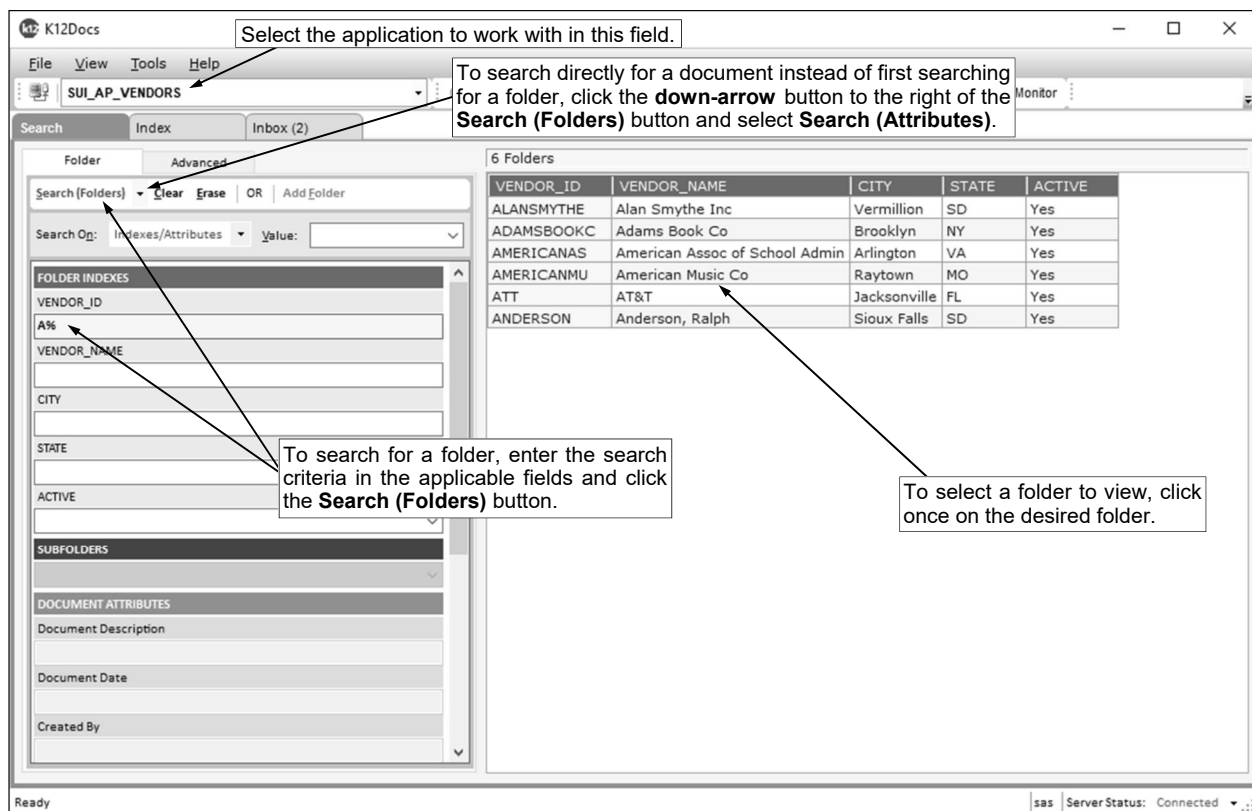
Viewing a Document:

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 <u>not</u> 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 <u>blank</u> to view all the folders in the application.

    Tip: Use the wildcard character—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.

Diagram C

K12Docs

Select the application to work with in this field.

File   View   Tools   Help

SUI_AP_VENDORS

To search directly for a document instead of first searching for a folder, click the **down-arrow** button to the right of the **Search (Folders)** button and select **Search (Attributes)**.

Search   Index   Inbox (2)

Folder   Advanced

Search (Folders) ▾ Clear   Erase   OR   Add Folder

Search On: Indexes/Attributes ▾ Value:

FOLDER INDEXES

VENDOR_ID

A%

VENDOR_NAME

CITY

STATE

ACTIVE

SUBFOLDERS

DOCUMENT ATTRIBUTES

Document Description

Document Date

Created By

6 Folders

VENDOR_ID	VENDOR_NAME	CITY	STATE	ACTIVE
ALANSMYTHE	Alan Smythe Inc	Vermillion	SD	Yes
ADAMSBOOKC	Adams Book Co	Brooklyn	NY	Yes
AMERICANAS	American Assoc of School Admin	Arlington	VA	Yes
AMERICANMU	American Music Co	Raytown	MO	Yes
ATT	AT&T	Jacksonville	FL	Yes
ANDERSON	Anderson, Ralph	Sioux Falls	SD	Yes

To search for a folder, enter the search criteria in the applicable fields and click the **Search (Folders)** button.

To select a folder to view, click once on the desired folder.

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b.   Click the **Search (Folders)** button located above the list of folder indexes (under the Folder tab).

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

d.   Select a folder to view (or open) by clicking once on the desired record.

e.   A new tab will open for the specified folder.

f.   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 <u>not</u> contain any documents) appear with a red box to the left of the label.

g.   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.

h.   The document attributes for each document included in the subfolder appear.

i.   Select the document to view (or open) by clicking once on the desired record.

Searching directly for a document from the main screen:

a.   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**.

b.   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 <u>blank</u> 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.

c.   Click the **Search (Attributes)** button located above the list of folder indexes and document attributes (under the Folder tab).

d.   The documents matching the specified criteria will appear on the right side of the screen.

e.   Select a document to view (or open) by clicking on the desired record.

f.   A new tab will open for the specified folder and document.
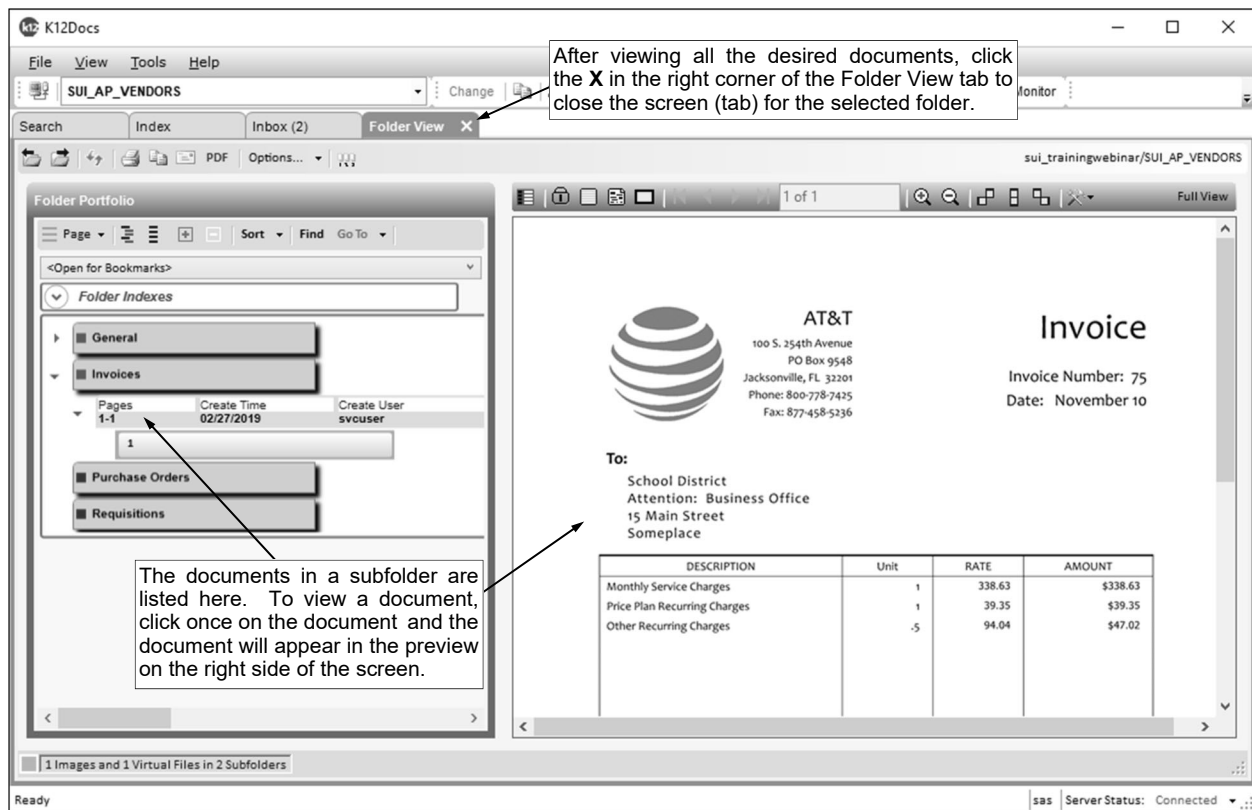
Diagram D

5. The document will appear in the preview screen on the right side of the screen. See **Diagram D**.

6. 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.

Indexing and Filing Documents:

1. On the main screen in GX, click the **Index** tab to access the documents that were scanned in batches to indexing lists. See **Diagram E**.

2. Click the **Lists** button.

3. The Index Document Lists screen appears showing all the indexing lists for each application, including the default scan lists and any customized indexing lists if applicable. The number of documents (batch files) and total pages for each indexing list display.

   Note: The number of documents and pages only display for an indexing list if there are documents that were scanned to the list and are waiting to be indexed and filed. If an indexing list does <u>not</u> display any numbers for documents and pages, the list does <u>not</u> contain any scanned documents.

4. Select the indexing list containing the documents to be indexed and filed by double-clicking on the desired list, or else by clicking once on the desired list and then clicking the **Check Out** button.

5. The documents (batch files) that were scanned to the selected indexing list display in the upper left corner of the screen.

6. Select the document (batch file) to index and file by clicking once on the desired document.

   Note: The preview of the selected document will appear on the right side of the screen.

7. Complete the process to index and file the desired pages of the selected document as follows:

   Tip: When indexing and filing a document, work from left to right on the screen to be sure all sections are completed.

   a. The application for where the document will be filed (added) appears in the Applications field. If needed, change the application for where to file the document by clicking the **down-arrow** button for the Applications field and choosing the correct one. The application from which the indexing list was selected will appear by default, if applicable.

   b. All the pages for the selected document display in the Pages section. Select the page of the document to index and file in the Pages section by clicking once on the desired page. Multiple
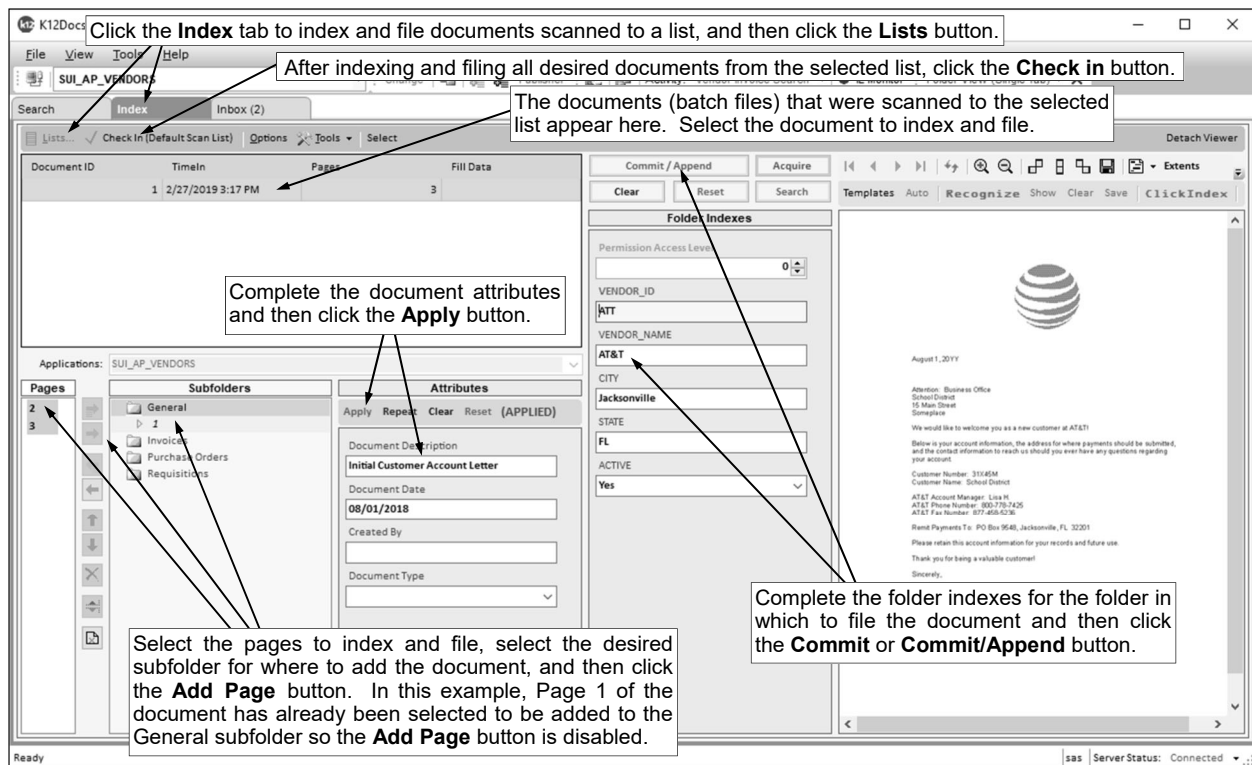
K12Docs — □ ✕

File   View   Tools   Help

SUI_AP_VENDORS

Search | Index | Inbox (2)

Lists... ✓ Check In (Default Scan List) | Options | Tools ▾ | Select   Detach Viewer

Document ID	TimeIn	Pages	Fill Data
1	2/27/2019 3:17 PM	3	

Complete the document attributes and then click the **Apply** button.

Commit / Append | Acquire
Clear | Reset | Search
Templates Auto Recognize Show Clear Save ClickIndex

Folder Indexes

Permission Access Level
0

VENDOR_ID
ATT

VENDOR_NAME
AT&T

Applications: SUI_AP_VENDORS

Pages	Subfolders	Attributes
2	General	Apply Repeat Clear Reset (APPLIED)
3	▷ 1	

CITY
Jacksonville

STATE
FL

ACTIVE
Yes

Invoices
Purchase Orders
Requisitions

Document Description
Initial Customer Account Letter

Document Date
08/01/2018

Created By

Document Type

Complete the folder indexes for the folder in which to file the document and then click the **Commit** or **Commit/Append** button.

Select the pages to index and file, select the desired subfolder for where to add the document, and then click the **Add Page** button. In this example, Page 1 of the document has already been selected to be added to the General subfolder so the **Add Page** button is disabled.

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Diagram E

pages can be selected by using the **Shift** key and selecting all the desired pages.

c. All the subfolders for the designated application appear in the Subfolders section. Select the subfolder for which to add the document by clicking once on the subfolder name, and then click the **Add Page** button. If desired, click the **Add All Pages** button to add all the pages of the selected document to the particular subfolder.

   Tip: If needed, after adding pages to a subfolder, click the **Page Up**, **Page Down**, or **Remove Page** buttons to move the pages in a different order within the subfolder or remove a page from being added to the subfolder.

d. The document attribute fields for the selected subfolder appear in the Attributes section. Complete the attributes for the document as desired:

   • Enter a description (up to **100** characters) for the document in the Document Description field.

   • Enter the date of the document in the Document Date field. Use the **mm/dd/yyyy** format.

   • Complete any additional attribute fields by entering the appropriate information or clicking the **down-arrow** button to select the correct information for a particular attribute field, if applicable.

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

   • After completing the document attributes, click the **Apply** button located at the top of the Attributes section.

e. All the folder index fields for the specified application appear in the Folder Indexes section. Search for and select the desired folder in which to add the document.

   Searching for a folder:

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

   Tip: If desired, use the wildcard character—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** button located above the Folder Indexes section.
- If there is only one folder that matches the specified criteria, the particular folder will automatically be selected and the applicable information will be populated in the appropriate folder index fields; otherwise, the Search screen will appear listing all the folders matching the specified criteria and then select the correct one to use.

 f. Once the desired folder is selected, click the **Commit** or **Commit/Append** button located above the Folder Indexes section to add the document as specified.

 g. If prompted that a duplicate folder was found, click **Yes** to continue adding the document to the existing folder; otherwise, click **No** to <u>not</u> add the document.

 h. If prompted for what to do with the document (batch file) after indexing and filing the specified page(s), select the desired action by clicking the appropriate button to preserve the entire document as it was originally, preserve the document with including only the unindexed pages, or delete the document from the list.

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

 Tip: If needed, to delete a document (batch file) from the list in the upper left corner of the screen because it does <u>not</u> need to be indexed and filed, right-click on the document (batch file) and select **Delete** (or select **Delete All** to delete all the documents (batch files) in the list)).

9. When finished indexing and filing all the desired documents from the selected list, click the **Check in** button (located under the Index tab).

Moving a Misfiled Document:

1. On the main screen in GX, select the desired application containing the document to move by clicking the **down-arrow** button for the Application field and choosing the correct one.

2. Click the **Search** tab if it is <u>not</u> 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.

4. Search for and select the desired folder and subfolder containing the document to move, or search directly for the desired document from the main screen.

5. Once the correct folder has been selected (opened) and the applicable subfolder is expanded, select the document to move by clicking on it once.

6. Right-click on the document to move and select **Select for Copy/Move**.

7. The selected document will be outlined in a green border (within the list of documents in the expanded subfolder) indicating the document is selected to be moved.

8. Select the desired subfolder for which to move the document.

 Note: If the document needs to be moved to a different folder, click the **Search** tab and search for and select the appropriate folder first, and then select the desired subfolder.

9. Right-click on the subfolder and select **Copy/Move Selected Items**.

10. When prompted, choose **Copy** or **Move** as the Apply Method; then click **OK**.

11. If needed, refresh the Folder View screen (tab), by closing the screen and then reopening it, or clicking the **Reload Folder** button.