

K12Docs Terminology and Structure

The K12Docs module includes a default electronic filing cabinet structure for the financial side (for use with the School Accounting System), for board meetings, and for student records, in addition to the flexibility to create additional applications if needed. The terminology used within K12Docs and the default filing cabinet structure defined for the financial applications associated with the School Accounting System are shown below.

Structure Term Definitions:

- **K12Docs:** an add-on module of the School Accounting System that serves as an electronic document storage solution with a secure and customizable cloud-based repository. The K12Docs module encompasses all the electronic filing cabinets.
- **Application:** a way to group similar documents together for storage purposes. An application within K12Docs is like a filing cabinet or a drawer within the filing cabinet.
- **Folders:** organizational elements containing related files or documents. The folders within K12Docs are like the green hanging folders within a filing cabinet drawer.
- **Indexes:** the identifiers for each folder (such as ID, Name, City, and State). The indexes in K12Docs are defined and apply to all the folders within one application.
- **Subfolders:** the folders within the main folders to aid in organizing the files and documents. The subfolders within K12Docs are like manila folders within the green hanging folders.
- **Documents:** files that are uploaded and stored in the subfolders.
- **Attributes:** the identifiers for each document (such as Document Description and Document Date). The attributes in K12Docs are defined and set by subfolder, and are completed for each document.

K12Docs Default Folder/Application Structure:

- **SUI_GL_Cash Receipts application** – index on Cash Receipt Key and Cash Receipt Number
 - Subfolders for Cash Receipts
- **SUI_GL_Documents application** – index on Year
 - Subfolders for 01-January through 12-December and General
- **SUI_AP_Vendors application** – index on Vendor ID, Vendor Name, City, State, and Active
 - Subfolders for General, Invoices, Purchase Orders, and Requisitions
- **SUI_AP_Documents application** – index on Year
 - Subfolders for 01-January through 12-December and General
- **SUI_PR_Employees application** – index on Employee ID, Last Name, First Name, Active, and Location
 - Subfolders for Archive, Benefits/Deductions, Contracts, Employee Uploaded (Pending), Human Resources, Leave Requests, Medical/FMLA/Disability, Payroll, Transportation, and Workers Compensation
- **SUI_PR_Documents application** – index on Year
 - Subfolders for 01-January through 12-December and General
- **SUI_PR_Documents_Sensitive application** – index on Year
 - Subfolders for 01-January through 12-December and General
- **SUI_PR_Payees application** – index on Payee ID, Payee Name, City, State, and Active
 - Subfolder for General
- **SUI_HR_Benefits application** – index on Benefit ID and Benefit Type ID
 - Subfolder for General
- **SUI_HR_Training_Events application** – index on Training Event Key, Training Event Description, Training ID, Training Type ID, and Training Start Date
 - Subfolder for General
- **SUI_HR_Documents application** – index on Year

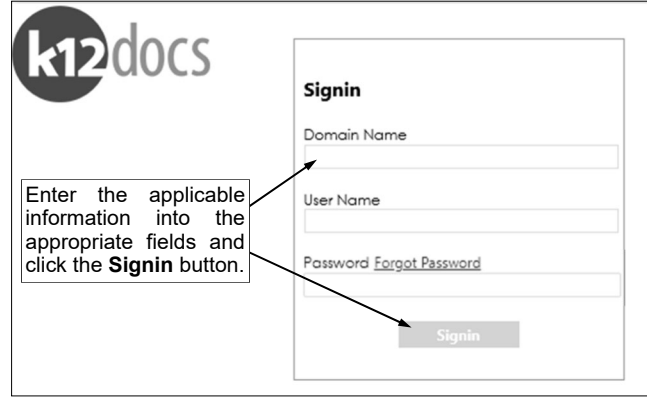
- Subfolder for General
- **SUI_NG_Documents application** – index on Year
 - Subfolder for General
- **SUI_FA_Assets application** – index on Asset Tag, Asset Description, Site ID, Building ID, Room ID, and Disposed
 - Subfolder for General
- **SUI_FA_Documents application** – index on Year
 - Subfolder for General
- **SUI_AR_Customers application** – index on Customer ID, Customer Name, City, State, and Active
 - Subfolder for General and Invoices/Payments
- **SUI_AR_Documents application** – index on Year
 - Subfolders for 01-January through 12-December and General
- **Board_Meetings application** – index on Document Type, Month, and Year
 - Subfolder Document
- **Student_Records application** – index on Student Number, State Student Number, Last Name, First Name, School, Status, and Graduation Date
 - Subfolder for Document

K12Docs

Logging into K12Docs:

1. Access K12Docs at: <https://intellicloud2.intellinetics.com/sui/k12docs/Signin>
2. At the Signin screen (see **Diagram A**), enter the following information:

- In the Domain Name field, enter the K12Docs domain assigned to your organization by Software Unlimited, Inc.
- 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.



Note: If you forgot your password and are unable log into K12Docs, click the "Forgot Password" link (located to the right of the label for the Password field) to have the system reset your password and email you a new, temporary password (you will be prompted to enter your domain, user name, and an email address that must match the one entered for your user (as defined in the Host Site Manager application by your K12Docs administrator)). Then after logging in with the temporary password, you will be prompted to enter a new password.

Diagram A

3. Click the **Signin** button.

Viewing a Document:

1. On the main screen in K12Docs (see **Diagram B**), 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, or to view a document for an employee, select the **SUI_PR_EMPLOYEES** application.
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:

- 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.

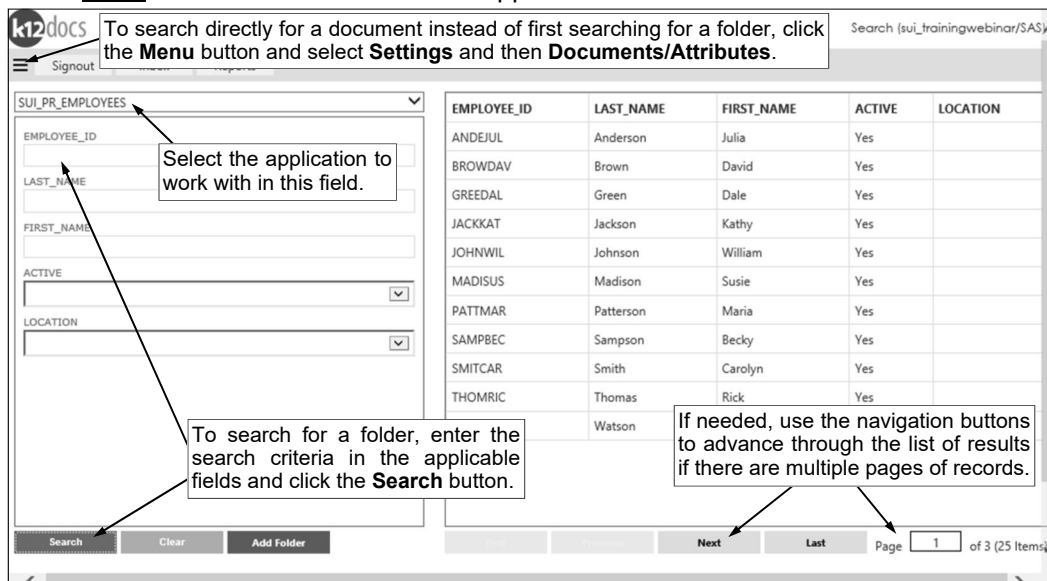


Diagram B

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 to view the folders for all employees defined with an ID starting with the letter G, or enter **%OFFICE%** in the VENDOR_NAME index field to view the folders for all vendors with the word “Office” as part of their name. Additional wildcard characters and operators available for use when searching are listed on **pages 2 - D and 2 - E** of this handout.

- Click the **Search** button located under the list of folder indexes.
- 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.
- The K12Docs Portfolio screen will open for the specified folder.
- The subfolders for the selected folder display on the screen. See **Diagram C**. The names of the subfolders that contain documents appear in black font, while the names of the subfolders that are empty (do not contain any documents) appear in orange.
- Select a subfolder to view (or open) by clicking once on the subfolder name or title bar.
- 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:

- Click the **Menu** button (the button with the three lines; see **Diagram B**) in the upper left corner of the screen and select **Settings**.
- Then select **Document/Attributes** and click the **Save** button.
- 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 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 under the list of folder indexes and document attributes.
- 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.
- The K12Docs Portfolio screen will open for the specified folder and document.

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

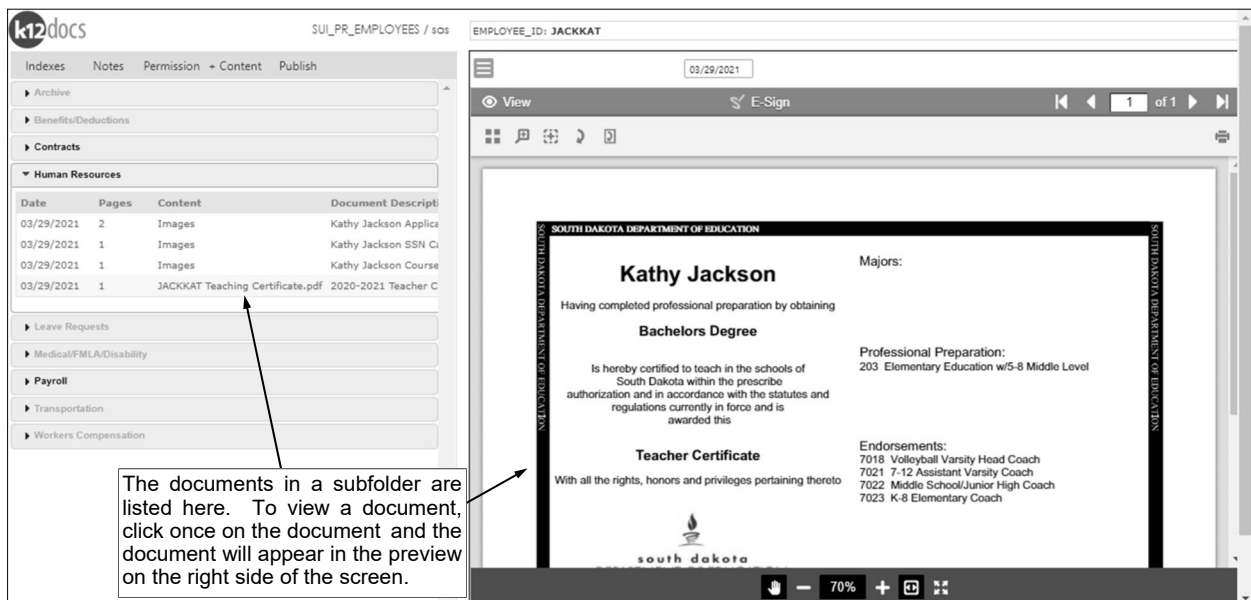


Diagram C

Adding a Document:

1. On the main screen in K12Docs, select the desired application for which to add the document by clicking the **down-arrow** button for the Application field and choosing the correct one. For example, to add a document for a vendor, select the **SUI_AP_VENDORS** application, or to add a document for an employee, select the **SUI_PR_EMPLOYEES** application.
2. The folder indexes for the specified application appear under the Application field.
3. Search for and select the desired folder for 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 blank 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 to view the folders for all employees defined with an ID starting with the letter G, or enter **%OFFICE%** in the VENDOR_NAME index field to view the folders for all vendors with the word “Office” as part of their name.

- Click the **Search** button located under the list of folder indexes.
 - The folders matching the specified criteria display on the right side of the screen.
 - Select the folder for which to add the document by clicking once on the desired record.
 - The K12Docs Portfolio screen will open for the specified folder.
4. The subfolders for the selected folder display on the screen. The names of the subfolders that already contain documents appear in black font, while the names of the subfolders that are empty (do not contain any documents) appear in orange.
 5. Select the subfolder for which to add the document by clicking once on the subfolder name or title bar.
 6. Click the **+ Content** button.
 7. The Upload/Add Content screen appears on the left side of the screen. See **Diagram D**.
 8. Click the **Browse** button to select the correct path (drive and folders) and file name of the document (file) to upload.

Note: The file size of the document to upload cannot be greater than 50MB.

9. 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.

Diagram D

10. Click the **Submit** button to upload the document.

11. A message will appear above the Submit button if the document was successfully uploaded.
12. Click the **X** to close the Upload/Add Content screen.
13. Refresh the K12Docs Portfolio screen in order to view the document within the specified subfolder (for example, right click and select **Refresh** or **Reload**, or press the **F5** key).
14. The document attributes for all the documents included in the subfolder appear.
15. Select the document to view (or open) by clicking once on the desired record.
16. The document will appear in the preview screen on the right side of the screen.

Deleting a Document:

1. Select to view the desired document to delete (if needed, refer to the instructions for “Viewing a Document” starting on page A of this handout).
2. Once the preview for the desired document to delete appears, click the **Menu** button located in the upper left corner of the preview screen, and then select the **Pageset Permission** button. See **Diagram E**.
3. On the Pageset Permission screen (see **Diagram F**), complete the following:
 - a. Select **Delete**.
 - b. Click the **Save** button.
 - c. Click the **X** in the upper right corner to close the Pageset Permission screen.
4. Refresh the K12Docs Portfolio screen in order to verify the document has been removed from the applicable subfolder (for example, right click and select **Refresh** or **Reload**, or press the **F5** key).

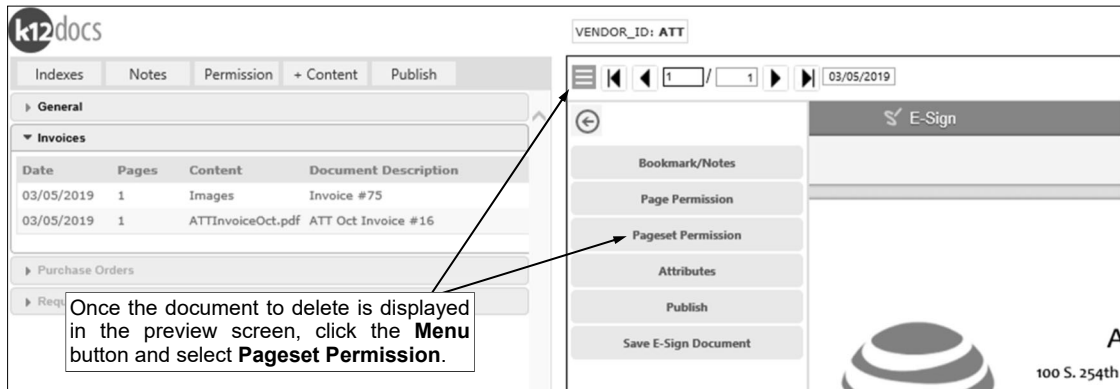


Diagram E

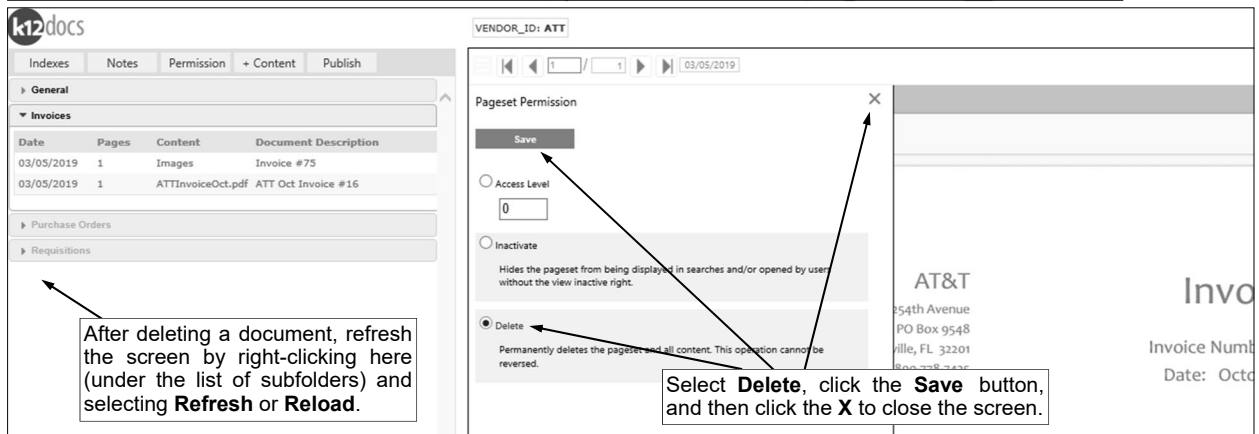


Diagram F

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 to view the folders for all employees defined with an ID starting with the letter G, or enter **%OFFICE%** in the VENDOR_NAME index field to view the folders for all vendors with the word “Office” as part of their name.

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 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 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 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 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 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 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 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 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 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 to view the folders for the employees defined with an ID of SMITH, JONES, and WILSON.