

# 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, enter the K12Docs domain assigned to your organization by Software Unlimited, Inc. in the Domain Name field. See **Diagram A**.
3. Enter your user name for accessing the K12Docs module in the User Name field.
4. Click the **Continue** button.
5. Enter your valid password for accessing the K12Docs module in the Password field. See **Diagram B**. Remember the password is case sensitive.

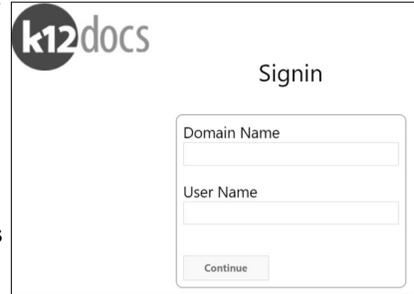


Diagram A

**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 B

6. Click the **Signin** button.

## Viewing a Document:

1. On the main screen in K12Docs (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. 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.

Diagram C shows the main K12Docs interface. At the top, it says '(sui\_trainingworkshop/sas)'. Below that, there are navigation tabs: Tools, Inbox, Audit Shield..., Indexing, Help. A dropdown menu is set to 'SUI\_PR\_EMPLOYEES'. The main area shows 'Search Results (Folders)' with a table of employee data. Annotations include:
 

- 'Select the application to work with in this field.' pointing to the dropdown menu.
- 'To sort the data in ascending or descending order, click on the column heading (text) for the desired column.' pointing to the 'LAST\_NAME' header.
- 'To search for a folder, enter the search criteria in the applicable fields and click the Search button.' pointing to the search input fields.
- 'To search directly for a document, click the Folders button and select Attributes.' pointing to the 'Folders' button.
- 'If needed, use the navigation buttons to advance through the list of results if there are multiple pages of records.' pointing to the 'Next' and 'Last' buttons.

EMPLOYEE_ID	LAST_NAME	FIRST_NAME	ACTIVE	LOCATION
ANDEJUL	Anderson	Julia	Yes	
BROWDAV	Brown	David	Yes	
GREEDAL	Green	Dale	Yes	
JACKKAT	Jackson	Kathy	Yes	
JOHNWIL	Johnson	William	Yes	
MADISUS	Madison	Susie	Yes	
PATTHAR	Patterson	Maria	Yes	
SAMPBEC	Sampson	Becky	Yes	
SHITCAR	Smith	Carolyn	Yes	
THOMRIC	Thomas	Rick	Yes	
WATSHIC	Watson	Michael	Yes	
WILLBER	Williamson	Bert	Yes	
	Johnson	Joe	Yes	
	Hite	Mary	Yes	
	Baxter	Jackie	Yes	
	Asper	Betty	Yes	
	Keller	Marsha	Yes	
HERNGRA	Hernandez			
PARKJUD	Parker			
COLLOLI	Collins			

Diagram C

**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 **pages 2 - G and 2 - H** 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.
- c. 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.

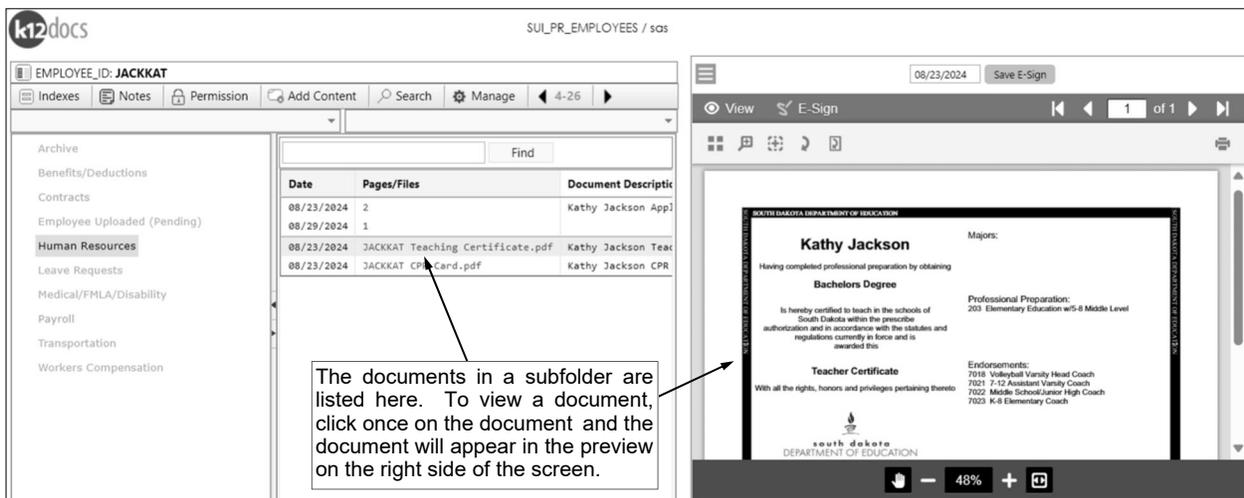
**Tip:** To change the sort order of the results, click on the column heading (text) for the desired field to sort the records in ascending order by that particular field (column), or click a second time on the column heading (text) to sort the records in descending order; an up or down arrow will appear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

- d. The K12Docs Portfolio screen will open for the specified folder.
- e. The subfolders for the selected folder display on the left side of the screen; select a subfolder to view (or open) by clicking once on the subfolder name. See **Diagram D**.

**Tip:** The names of the subfolders that contain documents appear in green font, while the names of the subfolders that are empty (do not contain any documents) appear in orange.

- f. Once a subfolder is selected, the documents within that subfolder display to the right of the subfolders. In the list of documents, the .TIF files are listed first (above the green bar, if applicable), followed by all other file types (below the green bar, if applicable). The document attributes for each document are listed, in addition to the Date column displaying the date the document was uploaded and the Pages/Files column reflecting either the total number of pages for .TIF files, or the original name of the file uploaded for all other file types.

**Tip:** To change the sort order of the results (within the sections above and below the green bar, if applicable), 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). To search the documents within a subfolder for document attributes with a certain value, enter the criteria in



**Diagram D**

the field (located directly above the list of document attributes) and click the **Find** button; then the documents with an attribute containing the specified value will have the text for the matching attributes displayed in blue, boldfaced font.

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

**Searching directly for a document from the main screen:**

- a. Click the **Folders** button located in the lower left corner of the screen (see **Diagram C**) 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; select a document to view (or open) by clicking on the desired record.

**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).

- e. 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 D**.

**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; to add a document for an employee, select the **SUI\_PR\_EMPLOYEES** application; or to add a 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 for which to add the document.

**Searching for a folder:**

- 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.

**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.
  - c. 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.  
**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).
  - d. The K12Docs Portfolio screen will open for the specified folder.
4. The subfolders for the selected folder display on the left side of the screen; select the subfolder for which to add the document by clicking once on the subfolder name.  
**Tip:** The names of the subfolders that already contain documents appear in green font, while the names of the subfolders that are empty (do not contain any documents) appear in orange.
  5. Click the **Add Content** button located at the top of the screen.
  6. The Add Folder Content screen appears on the left side of the screen. See **Diagram E**. Complete the screen as follows:

- a. Click the **Choose File** button to select the correct path (drive and folders) and file name of the document (file) to upload. The file to upload can also be selected by clicking on the desired file, and then dragging and dropping it directly over the top of the **Choose File** button.

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

- b. Click the **Upload File** button to add the document (file) to the list of documents to upload.
- c. To upload multiple documents (files) all at once using the same attributes, repeat Steps a and b until all files to upload have been selected and are listed on the screen.

**Note:** If needed, to remove a document (file) from the list of documents to upload, click on the file to select it and then click the **Remove** button.

- d. **For .TIF files only**, if multiple documents (.TIF files) are

selected to be uploaded, select the Combine Images Single Pageset field (located at the top of the Add Folder Content screen) in order to combine all the .TIF files together as one document (one .TIF file) when uploading. A checkmark will appear in the box if the field is selected. If the field is not selected, the .TIF files will be uploaded separately using the same attributes.

- e. Complete the document attributes 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, if applicable.

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

**Diagram E**

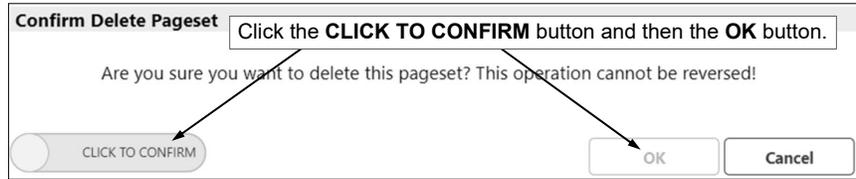
- f. Click the **Submit** button to upload the document(s).
  - g. A message will appear to the right of the **Submit** button stating the document was successfully uploaded.
  - h. Click the **X** to close the Add Folder Content screen.
7. The K12Docs Portfolio screen will automatically be refreshed and show the newly uploaded document(s) in the document list for the particular subfolder.

**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 2 - A** of this handout).
2. Once the document to delete is displayed on the preview screen, complete one of the following methods:

**Method 1:**

- a. Right-click on the document (in the list of documents) and select **Delete**.

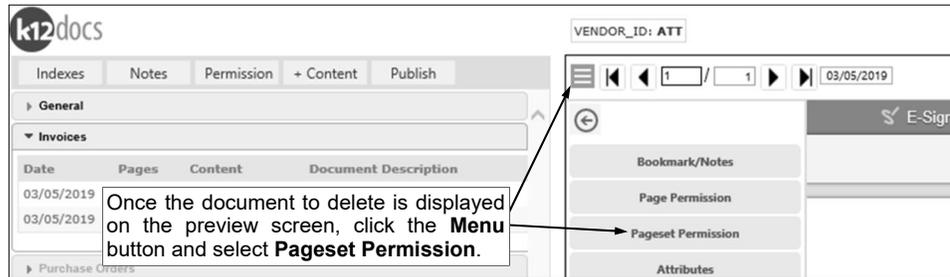


**Diagram F**

- b. On the Confirm Delete Pageset screen (see **Diagram F**), click the **CLICK TO CONFIRM** button and then click the **OK** button.
- c. A prompt will appear stating the document was deleted; click **OK**.
- d. The K12Docs Portfolio screen will automatically be refreshed to verify the document was removed.

**Method 2:**

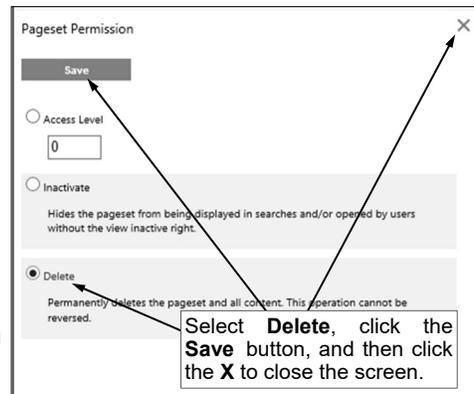
- a. Click the **Menu** button located in the upper left corner of the preview screen, and then select **Pageset Permission**.



**Diagram G**

- b. On the Pageset Permission screen (see **Diagram H**), select **Delete**; then click the **Save** button.
- c. Click the **X** in the upper right corner to close the Pageset Permission screen.
- d. If desired, right-click on the subfolder and select **Refresh Pagesets** to refresh the list of documents in the selected subfolder and verify the document was removed.

**Note:** If the document is a multiple-page .TIF file and only one page within the document needs to be deleted, for Step a (above, as part of Method 2) advance to the desired page to delete (on the preview screen), and then click the **Menu** button and select **Page Permission** instead. If a page of a .TIF document is deleted using the Page Permission option, a page will remain in the document at the particular page location showing PAGE DELETED.



**Diagram H**

**Moving a Misfiled Document:**

1. Select to view the desired document to move (if needed, refer to the instructions for “Viewing a Document” starting on **page 2 - A** of this handout).
2. Once the document to move is displayed on the preview screen, right-click on the document (in the list of documents) and select **Transfer Select (Pageset)**.

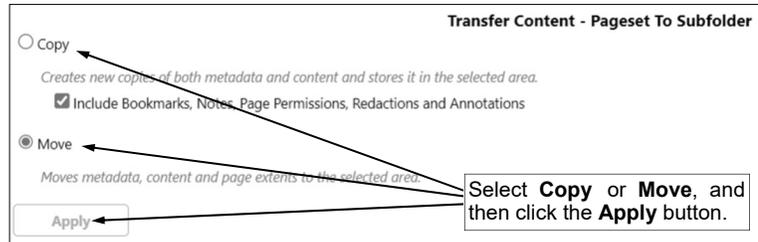
**Note:** If the document is a multiple-page .TIF file and only one page within the document needs to be moved, advance to the desired page to move (on the preview screen), and then right-click on the document to move (in the list of documents) and select **Transfer Select (Page)** instead.

**Tip:** If needed, to clear the cache so a document is no longer selected to be moved, select the **Manage** button, then **Transfer**, and **Clear**.

3. Select the desired subfolder for where to move the document.

**Note:** To move the document to a different folder, close the K12Docs Portfolio tab in order to view the main K12Docs screen; then search for and select the appropriate folder, and select the desired subfolder.

4. Right-click on the subfolder and select **Transfer Endpoint**.
5. On the Transfer Content screen (see **Diagram I**), select **Copy** to copy the selected document or select **Move** to move the document; then click the **Apply** button.



**Diagram I**

**Note:** If **Copy** is specified, select the Include Bookmarks, Notes, Page Permissions, Redactions and Annotations field to copy the additional information along with the document, if desired. A checkmark will appear in the box if the field is selected.

6. A message will appear to the right of the **Apply** button stating the transfer was successful.
7. Click the **X** to close the Transfer Content screen.

**Note:** If only one page of a multiple-page .TIF document was moved (not copied) using the Transfer Select (Page) option, a page will remain in the document at the particular page location showing PAGE DELETED.

8. The K12Docs Portfolio screen will automatically be refreshed.

#### **Moving All Contents (Documents) in a Subfolder:**

1. Select the folder and subfolder containing the documents to move (if needed, refer to the instructions for “Viewing a Document” starting on **page 2 - A** of this handout).
2. Once the documents for the selected subfolder are displayed (on the K12Docs Portfolio tab), right-click on the subfolder and select **Transfer Select**.

**Tip:** If needed, to clear the cache so documents (in a subfolder) are no longer selected to be moved, select the **Manage** button, then **Transfer**, and **Clear**.

3. Select the desired subfolder for where to move the documents.

**Note:** If the documents needs to be moved to a different folder, close the K12Docs Portfolio tab in order to view the main K12Docs screen; then search for and select the appropriate folder, and select the desired subfolder.

4. Right-click on the subfolder and select **Transfer Endpoint**.
5. On the Transfer Content screen (see **Diagram I**), select **Copy** to copy the documents or select **Move** to move the documents; then click the **Apply** button.

**Note:** If **Copy** is specified, select the Include Bookmarks, Notes, Page Permissions, Redactions and Annotations field to copy the additional information along with the documents, if desired. A checkmark will appear in the box if the field is selected.

6. A message will appear to the right of the **Apply** button stating the transfer was successful.
7. Click the **X** to close the Transfer Content screen.
8. The K12Docs Portfolio screen will automatically be refreshed.

#### **Moving All Contents (Documents) in a Folder:**

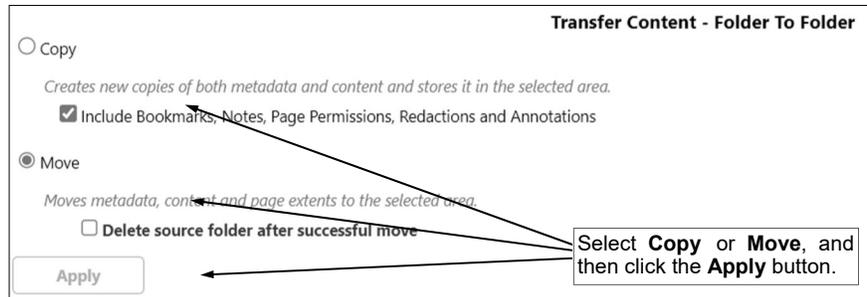
1. Select the folder containing the documents to move (if needed, refer to the instructions for “Viewing a Document” starting on **page 2 - A** of this handout).
2. Once the folder is displayed (on the K12Docs Portfolio tab), select the **Manage** button, then **Transfer**, and **Folder**.

**Tip:** If needed, to clear the cache so documents (in a folder) are no longer selected to be moved, select the **Manage** button, then **Transfer**, and **Clear**.

3. Close the K12Docs Portfolio tab in order to view the main K12Docs screen; then search for and select the appropriate folder for where to move the documents.

- Once the folder for where to move the documents is displayed (on the K12Docs Portfolio tab), select a subfolder (does not matter which subfolder is selected), and then right-click on the subfolder and select **Transfer Endpoint**.
- On the Transfer Content screen (see **Diagram J**), select **Copy** to copy the documents or select **Move** to move the documents.

- If **Copy** is specified, select the Include Bookmarks, Notes, Page Permissions, Redactions and Annotations field to copy the additional information along with the documents, if desired. A checkmark will appear in the box if a field the selected.



**Diagram J**

- If **Move** is specified, select the Delete Source Folder After Successful Move field to delete the empty folder after the contents are moved, if desired. A checkmark will appear in the box if a field the selected.
- Click the **Apply** button.
- A message will appear to the right of the **Apply** button stating the transfer was successful.
- Click the **X** to close the Transfer Content screen.
- The K12Docs Portfolio screen will automatically be refreshed.

### **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:

- % (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.
- \_ (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).
- < (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.
- > (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.
- <= (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.
- >= (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.

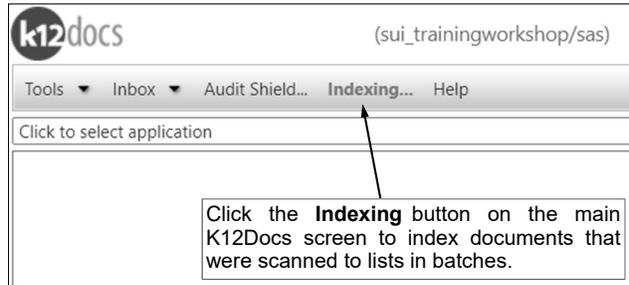
7. **!< (Not Less Than):** Use the operator of not less than (!<) in your variable search information to view all the records with values that are not less than a specified value. For example, enter **!<SMITH** in the EMPLOYEE\_ID index field (within the SUI\_PR\_EMPLOYEES application) to view the folders 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.

# Indexing Documents from Lists in K12Docs (Used with Batch Scanning)

## Indexing and Filing Documents from Lists:

**Note:** When scanning a batch of documents to an indexing list, be sure to scan as .TIFF files in order to be able to index and file the individual pages separately; or else the indexing list must be defined (in Host Site Manager) with the Convert Inbound Files to Image Pages field enabled for virtual files.

1. At the top of the main screen in K12Docs, click the **Indexing** button to access the documents that were scanned in batches to indexing lists. See **Diagram A**.
2. On the K12Docs Indexing Hub screen (tab), click the **down-arrow** button for the Applications field and select the application for which to index and file documents. See **Diagram B**.
3. Click the **down-arrow** button for the Lists field and select the indexing list containing the documents to be indexed and filed.



**Diagram A**

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

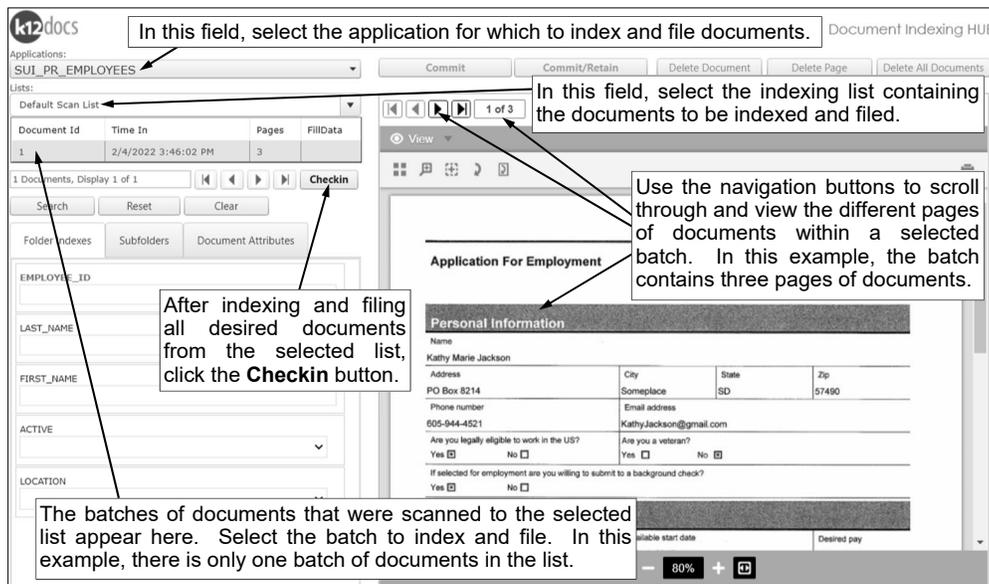
**Tip:** The number of batches, along with the total number of pages, waiting to be indexed and filed for an indexing list display. If there are no indexing lists with batches of documents waiting to be indexed and filed, **No Lists Found** displays in the drop-down list.

4. The batches of documents that were scanned to the selected indexing list and are available to be indexed and filed display under the Lists field. For each batch, an ID, the date and time the batch was scanned (added) to the list, and the total number of pages in the batch are shown. (**Tip:** If a batch of documents was scanned as a virtual file type (including .PDF or .DOC file types), an asterisk appears to the right of the number of pages, and the number of pages reflects the number of virtual files (documents) in the batch rather than the total number of actual pages.)

**Tip:** If needed, use the navigation buttons located under the list of batches to advance through the list if there are multiple pages.

5. Select the batch of documents to index and file by clicking once on the desired row.

**Note:** The preview of the first page in the selected batch of documents will appear on the right side of the screen; use the navigation buttons located in the upper left corner of the preview screen to scroll through and view the different pages of documents within the selected batch.



**Diagram B**

6. Complete the process to index and file the desired page(s) of the selected batch as follows:  
**Tip:** When indexing and filing a document, complete the tabs from left to right on the screen to be sure all sections are completed.

a. On the Folder Indexes tab (see **Diagram C**), all the index fields for the specified application appear in order to search for and select the desired folder in which to add (file) the document.

**Searching for a folder:**

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

**Tip:** If desired, use a wildcard character in your variable search information for the indexes; for example, use the percent sign (%) as a placeholder for an unlimited number of characters.

- Click the **Search** button located above the Folder Indexes tab, or press the **Enter** key.
- If there is only one folder that matches the specified criteria, the particular folder will automatically be selected and the applicable information will be populated in the appropriate folder index fields. See **Diagram D**.
- If there are multiple folders that match the specified criteria, the search results list will appear at the top of the screen (above the Applications field) showing all the folders matching the specified criteria. Select the correct folder in which to file the document by clicking on it once; the applicable information will then be populated in the appropriate folder index fields. Then click the **Close** button located at the top of the search results list.

**Tip:** If needed, use the navigation buttons located above the search results list to advance through the list if there are multiple pages.

The screenshot shows the 'k12docs Document Indexing HUB' interface. At the top, there are navigation buttons: 'Close', '2 Folders, Display 1 of 1', 'First', 'Previous', 'Next', and 'Last'. Below this is a table of search results:

fid	EMPLOYEE_ID	LAST_NAME	FIRST NAME	ACTIVE	LOCATION
1195	JACKSKATH	Jackson	Kathy	Yes	
4230	JACKWARRE	Jackson	Warren	Yes	

Annotations on the screenshot include:

- A box pointing to the search results table: "If there are multiple folders that match the specified criteria, the search results display here. Select the correct folder in which to file the document and then click the **Close** button."
- A box pointing to the navigation buttons: "If there are multiple pages of results, use the navigation buttons to scroll through and see all the results."
- A box pointing to the 'Folder Indexes' tab and search fields: "Complete the folder indexes for the folder in which to file the document and then click the **Search** button. If desired, wildcard characters can be used in the variable search information, as shown in this example." (The fields shown are EMPLOYEE\_ID, LAST\_NAME with 'JA%', and FIRST\_NAME).
- A box pointing to the application selection dropdown: "Remember, the folder index fields that appear here vary depending on the selected application. In this example, the folder index fields appear for the SUI\_PR\_Employees application."

The main application form is titled 'Application For Employment' and includes sections for 'Personal Information' (Name: Kathy Marie Jackson, Address: PO Box 8214, City: Someplace, State: SD, Zip: 57490, Phone: 605-944-4521, Email: Kathy.Jackson@gmail.com) and 'Employment Information' (Start date: 2017, Desired pay: 35,000, Major: Elementary ED).

**Diagram C**

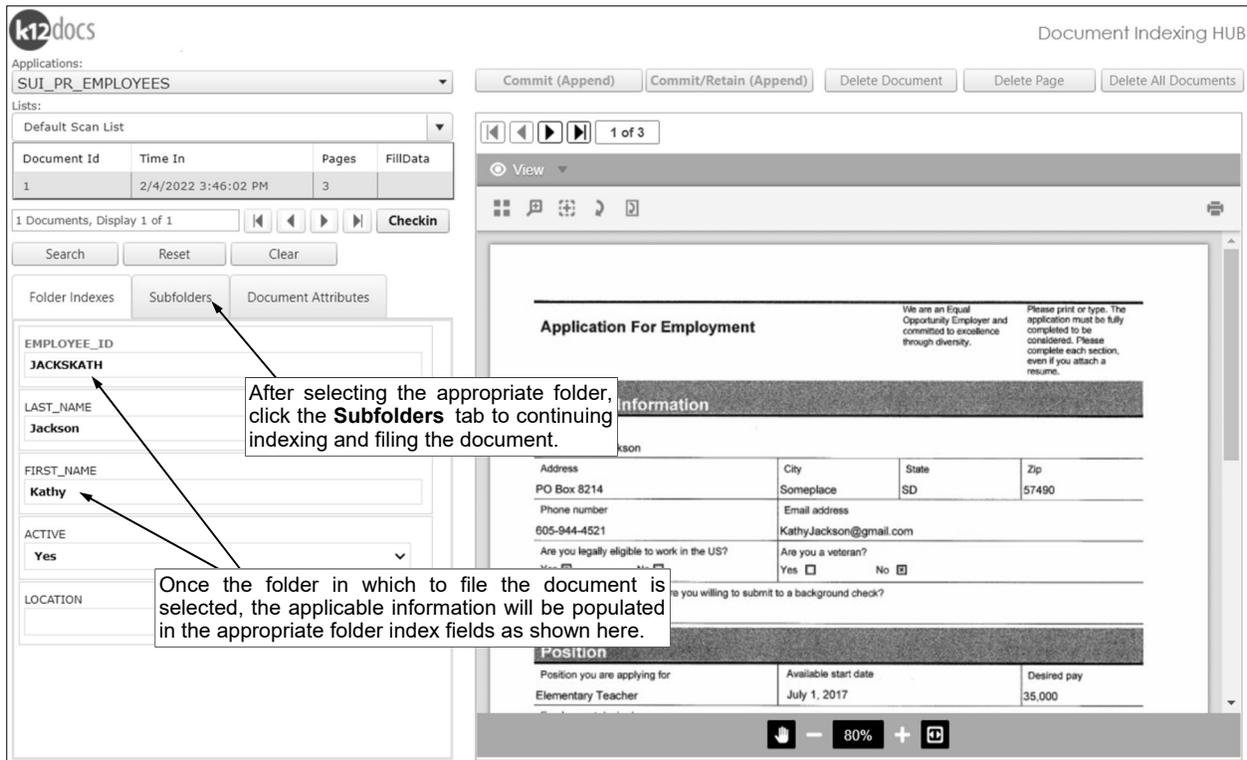


Diagram D

b. Click the **Subfolders** tab and complete the necessary information. See **Diagram E**.

- In the Last Page to Commit field, enter the number of the last page to index and file from the selected batch; for example, to index and file only the first page of the batch, enter **1** in this field, or to index and file the first two pages of the batch, enter **2**. By default, the last page number in the batch will appear but can be changed.

**Tip:** If needed, to delete a page from the batch of documents because it does not need to be indexed and filed, select to preview the appropriate page and then click the **Delete Page** button (located above the preview screen); and when prompted, click **OK** to continue deleting the page.

**Note:** The Last Page to Commit field only appears when indexing and filing batches that are .TIFF files; the field does not appear for virtual file batches (including .PDF or .DOC file types). If indexing and filing a virtual file batch, which is not recommended, all the pages from the first virtual file will be indexed and filed together as one document, while any additional virtual files in the batch (if applicable) will be removed.

For example, if two .PDF files were scanned (or added) as one batch, only the first file will actually be indexed and filed and the second one will be removed.

- All the subfolders for the designated application for which the user has rights appear in the subfolders list. Select the subfolder for which to add (file) the document by clicking once on the subfolder name. The name of the selected subfolder will appear above the subfolders list, in addition to the selected subfolder being outlined in a shaded box within the list. If

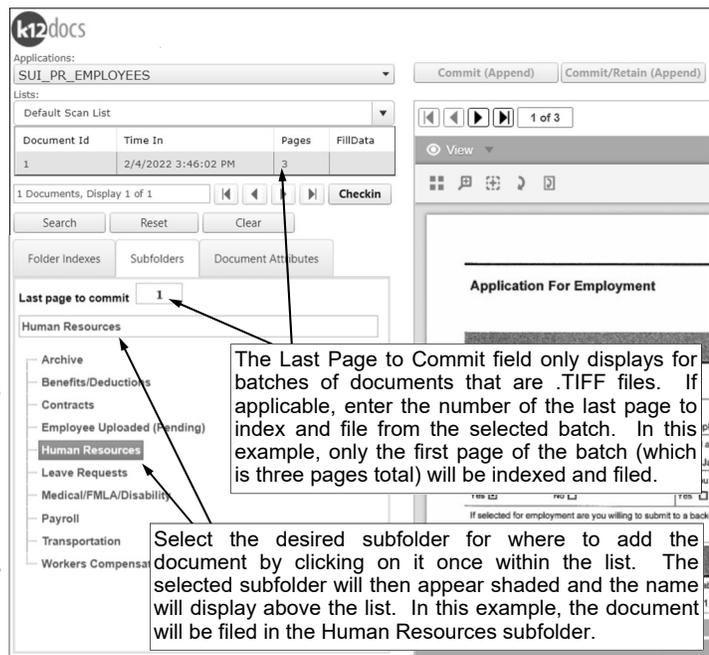


Diagram E

there is only one subfolder defined within the specified application, the one subfolder will be selected automatically.

c. Click the **Document Attributes** tab and complete the attributes for the document as desired. See **Diagram F**.

- Enter a description (up to **100** characters) for the document in the Document Description field.
- Enter the date of the document in the Document Date field. Use the **mm/dd/yyyy** format.
- Complete any additional attribute fields by entering the appropriate information or clicking the **down-arrow** button to select the correct information for a particular attribute field, if applicable.

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

d. To file the document as specified, click the **Commit** button (or **Commit (Append)** button) located above the preview screen, or else click the **Commit/Retain** button (or **Commit/Retain (Append)** button) to file the document as specified while also retaining the values for the folder indexes to use with indexing and filing the next document.

**Tip:** The **Commit** button and the **Commit/Retain** button display if the specified folder has not yet been created, while the **Commit (Append)** button and the **Commit/Retain (Append)** button display if the specified folder already exists.

7. Repeat Steps 5 and 6 until all the desired documents have been indexed and filed from the selected list.

**Tip:** If needed, to delete a batch of documents from the list because it does not need to be indexed and filed, select the batch and then click the **Delete Document** button (located above the preview screen), or to delete all the batches in the selected list, click the **Delete All Documents** button; and when prompted, click **OK** to continue deleting.

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

The screenshot shows the 'Document Indexing HUB' interface. On the left, a 'Documents' list shows one document with ID 1, Time In 2/4/2022 3:46:02 PM, and 3 pages. Below this is a 'Checkin' button. The main area shows the 'Document Attributes' tab for 'Kathy Jackson Teacher Application'. Fields include Document Date (06/20/2021), Human Resources Document Type (Employment Application), and Document Status (Reviewed). The 'Application For Employment' form is visible in the background, with fields for address, contact info, and employment details. At the top, buttons for 'Commit (Append)', 'Commit/Retain (Append)', 'Delete Document', 'Delete Page', and 'Delete All Documents' are shown. Arrows point from text boxes to these buttons and the 'Document Attributes' tab.

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

To file the document, click the **Commit (Append)** button, or else to file the document and retain the values for the folder indexes, click the **Commit/Retain (Append)** button.

Click the **Document Attributes** tab to continuing indexing and filing the document.

Complete the document attributes as desired.

Remember, the document attribute fields that appear here vary depending on the selected subfolder for where the document will be filed. In this example, the document attribute fields appear for the Human Resources subfolder within the SUI\_PR\_Employees application.

**Diagram F**