

DIGITAL STORAGE AND RETRIEVAL

User Manual

SOFTWARE OPERATION
AND INSTRUCTION

myjdox.com

JDox User's Manual

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JDox User's Manual

Chapter 1 Introduction

Welcome to JDox, an innovative solution to data sharing, storage and retrieval that is unlike any other data storage utility. JDox can best be described as a large database that keeps your documents in digital format as opposed to having paper documents in a filing cabinet. The key benefits of using JDox is the search feature that makes locating documents quick and easy.

The benefits of using JDox include:

- * Access JDox anywhere you have internet access
- * Secured Data - JDox is a https:// secured website that uses 128 bit encryption for layered security
- * **Multiple Browser Support - Google Chrome is recommended**, but you can use any of the popular browser such as Firefox, Safari or Internet Explorer
- * Secured with a user name and Password to log on. (Note: immediate online password reset if you forget your password)
- * Access to the privileges/rights are assigned by school administration
- * Ongoing help online or you may contact JDox Support
- * JDox supports multiple file types such as Microsoft Office files, Text Files and jpeg files. Adobe Reader is recommended, even though you will use PDF most of the time.

Definitions

Metadata – *A set of data that describes and gives more information about other data.* Metadata is used to retrieve, use or manage your data quickly and easily. The *author, date created* and *date modified* are examples of metadata.

Metadata in JDox works the same way, which is why it is important to properly label your documents and files and utilize key Metadata words, such as Purchase Orders, Students, etc., to save and locate your documents.

Schema – The Schema in JDox are groups of metadata related to file types. Your Logon and Password allows you to have access to certain schemas according to your needs.

If you handle multiple types of records, you will have multiple schemas available via a pick menu as shown below.

The screenshot shows the JDox 'Upload' interface. At the top, there is a blue navigation bar with the JDox logo and the text 'DIGITAL STORAGE AND RETRIEVAL'. The navigation bar includes links for 'Home', 'Checked Out', 'Inbox', 'Upload', 'Help', 'Settings', and 'Log off'. Below the navigation bar, the 'Upload' section is displayed. On the left, there is a button labeled 'JR3 Education Assoc'. In the center, a dropdown menu is open, showing a list of schemas: 'BO Default', 'BO Finance', 'BO Payroll', 'BO Staff/Student', 'Cab MISC', 'Cab Personnel', 'Cab Student Record', 'Default', 'Dwyane', 'EML', 'Finance Documents', 'Front Desk', 'General Finance', 'HR Schema', 'Human Resource', 'JR3 Default Schema', 'JR3 Finance', 'JR3 Staff', 'Misc Record', and 'No Metadata'. To the right of the dropdown menu, there are several input fields for metadata, including 'Document Type', 'School Year', 'District', 'Subject', 'Notes', and 'Period Pay D'. Below the dropdown menu, there is a 'Select File(s)' section with a 'Browse...' button and a 'No files selected.' message. At the bottom left, there is an 'Upload' button.

What You Need

Basic JDox users only need:

- ✓ Internet Access
- ✓ Web Browser (Google Chrome Recommended)

Users who will be scanning and/or editing records may also need:

- ✓ Scanner (Fujitsu's xi500 is a great desktop scanner for about \$400)
- ✓ Adobe Pro (Recommended)

Rights and Privileges

JDox enables the Administrator to assign rights and privileges to each user, based on the district's criteria for enhanced security.

- * Your Logon/Password allows only the functions and activities as determined by your local administration.

- * The delete function is reserved for only a critical few. If files are mistakenly deleted, there is a 30-day grace period for recovery. You will need to contact your System Administration (JDox) to facilitate the recovery.

Chapter 2

Getting Familiar with JDox

JDox's layout is easy to maneuver through. This chapter will familiarize you with all of the JDox screens and tools available to assist you in uploading/saving, searching, viewing and printing your district's files.

Icon/Function Buttons

Throughout JDox you will see Icon Buttons. These Icon Buttons allow you to perform a function or gives you additional information, with just one click. These Icon Buttons mean and do the same thing throughout JDox, so becoming familiar with them will simplify your tasks.

-  Edit Button – Allows you to edit a document
-  Check Out Button – opens a document for your use and locks out to others while you are making changes
-  Details Button – Gives Metadata information such as Filename, Folder ID, Schema, Uploaded By, Uploaded Date and Description., as well as the ability to Edit the metadata and folders on a file.
-  Delete Button

Naming Files

Filename Limitations

While most organizations have standardized guidelines for naming their files, it is important to avoid the following characters when naming files to upload into JDox to avoid potential uploading errors.

< > , . / \ ? () ! : " ' ~ ` @ # \$ % ^ & * _

If filenames contain any of the special characters listed above, programs can interpret these as operators or functions instead of part of a filename, and *can* cause uploading and downloading issues.

Windows hides the true length of filenames and their absolute paths; therefore, long filenames can also be problematic. Try to limit the characters in the name of the file.

File Naming Convention

To get the most of the Metadata and Schema search features, it is highly recommended that file naming policies be developed.

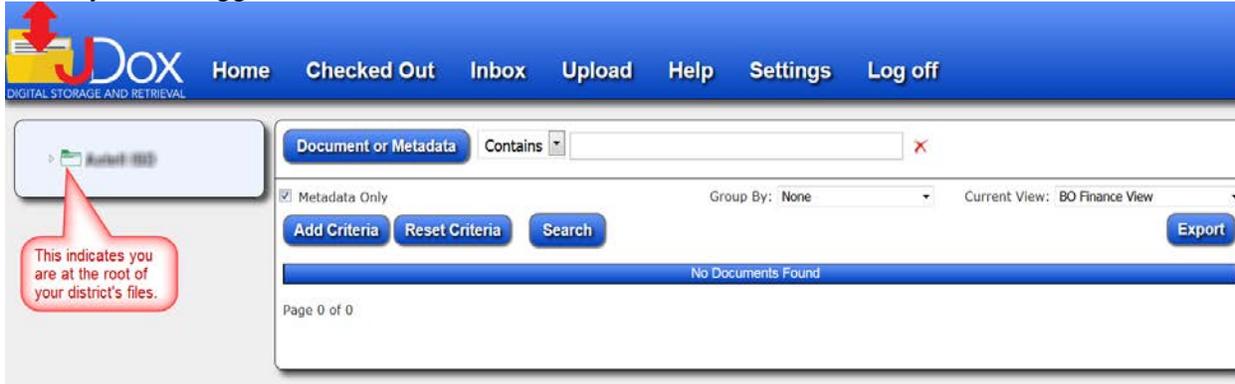
How to Access JDox

Make sure you have internet access. When you are setup, you will be given the link to the appropriate web location for your district.

You will be directed to the Login page shown below.



When you are logged in, the screen will look like this.



Forgot Password

If you forget your password, from the login screen:

Click **Forgot Password**



Enter your e-mail address that is associated with your district or JDox account.

Click on **Recover Account**

The screenshot shows the JDox website's Password Reset page. At the top is a blue navigation bar with the JDox logo and links for Home, Checked Out, and Inbox. Below the navigation bar is a white box with the heading "Password Reset". The text inside the box instructs the user to enter their email address and click "Recover Account". A red callout bubble with the number "1" points to the email input field, containing the text: "1. Enter your e-mail address that is associated with JDox or your district". Below the input field is a blue button labeled "Recover Account", with a red callout bubble with the number "2" pointing to it, containing the text: "2. Then select Recover Account". Below the button is a link for "Back to Login". At the bottom of the white box is the text "An email was sent", with a red callout bubble with the number "3" pointing to it, containing the text: "3. A message will pop up telling you an e-mail was sent".

You will receive a pop-up message telling you an e-mail has been sent.

Check your e-mail for a message with a link to reset your password.

Reset your password for JDox

jdox_No_reply_needed@jr3online.com

Sent: Tue 5/3/2016 9:55 AM

To: [Redacted]

Click on the link to reset your password

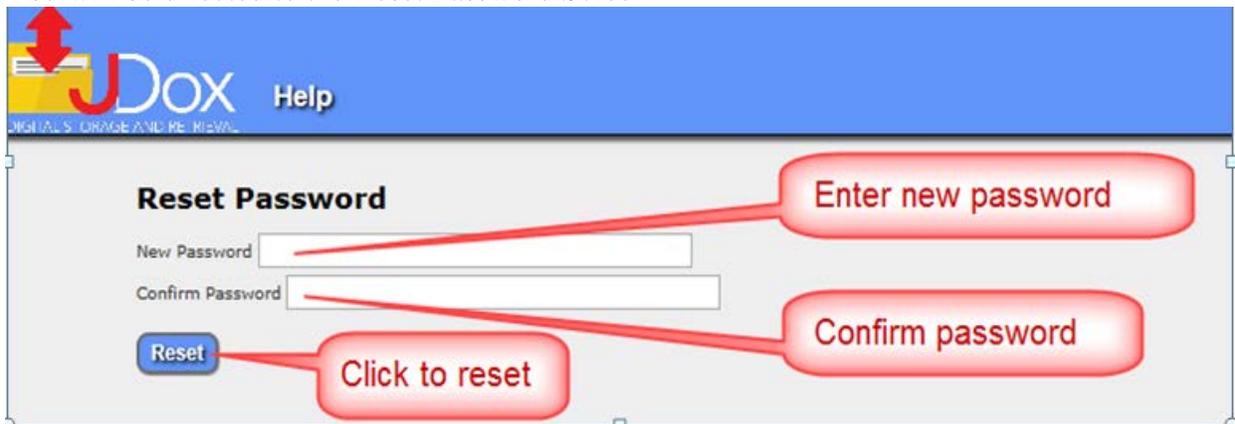
This email was sent because a request was made to reset your password.

Your User Name is: [Redacted]

Please click on the link to reset your password

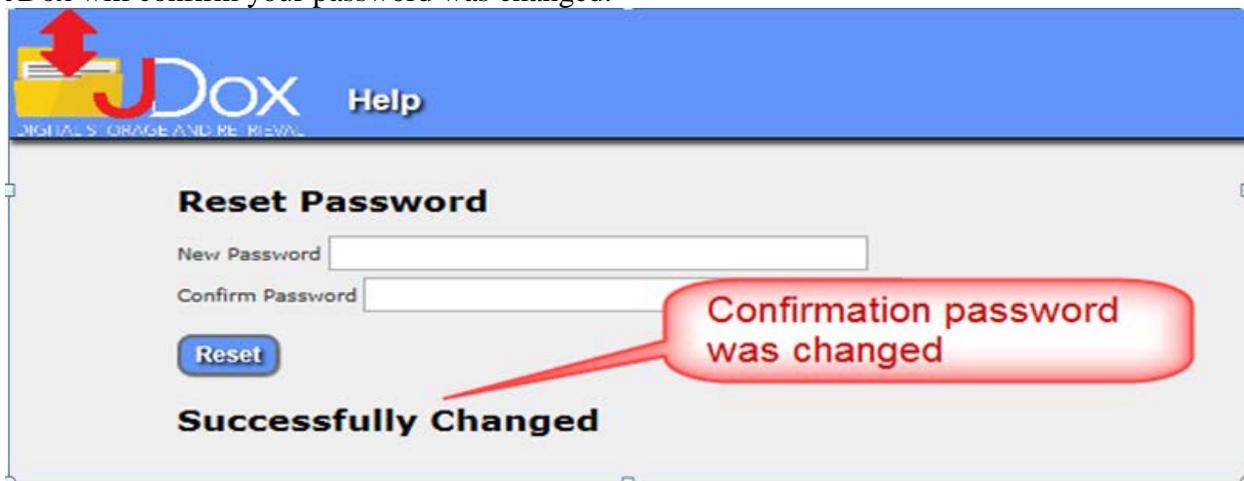
<http://jr3.myjdox.com/webapp/Account/ResetPassword?rt=ujhegSFjW9WHZYcSCZgr5Q2>

You will be directed to the Reset Password Screen



The screenshot shows the JDox 'Reset Password' interface. At the top left is the JDox logo with a red double-headed arrow and the text 'DIGITAL STORAGE AND RETRIEVAL'. To the right is a 'Help' link. The main heading is 'Reset Password'. Below it are two input fields: 'New Password' and 'Confirm Password'. A blue 'Reset' button is positioned below the 'Confirm Password' field. Three red callout boxes with white text point to the fields and button: 'Enter new password' points to the 'New Password' field, 'Confirm password' points to the 'Confirm Password' field, and 'Click to reset' points to the 'Reset' button.

JDox will confirm your password was changed.



This screenshot shows the JDox 'Reset Password' interface after a successful password change. The 'New Password' and 'Confirm Password' fields are now empty. The 'Reset' button is still present. A large red callout box with white text says 'Confirmation password was changed'. Below the input fields, the text 'Successfully Changed' is displayed in a bold, black font.

You may return to "How to Access JDox" instructions to access the Login Screen



The screenshot shows the JDox login screen. At the top is the JDox logo with a red double-headed arrow and the text 'DIGITAL STORAGE AND RETRIEVAL'. Below the logo are two input fields: the first contains the text 'stucker' and the second contains seven dots. A yellow 'Log in' button is located below the input fields. To the right of the 'Log in' button are two links: 'Help' and 'Forgot Password'.

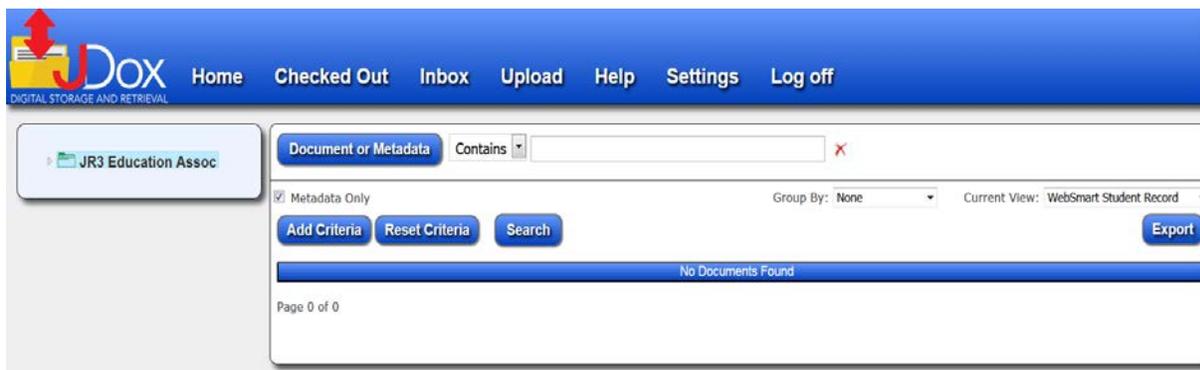
Functions of JDox

JDox is a very powerful tool. Becoming familiar with each section, such as Home, Checked Out, Inbox, etc. will assist you in quickly and easily performing the functions of each tab.

Below is a brief description of what each category will do for you. Detailed instructions on how to complete tasks are also provided in this User’s Manual or you may always contact JR3’s Support Team if you cannot locate what you are looking for by using the Help Feature.

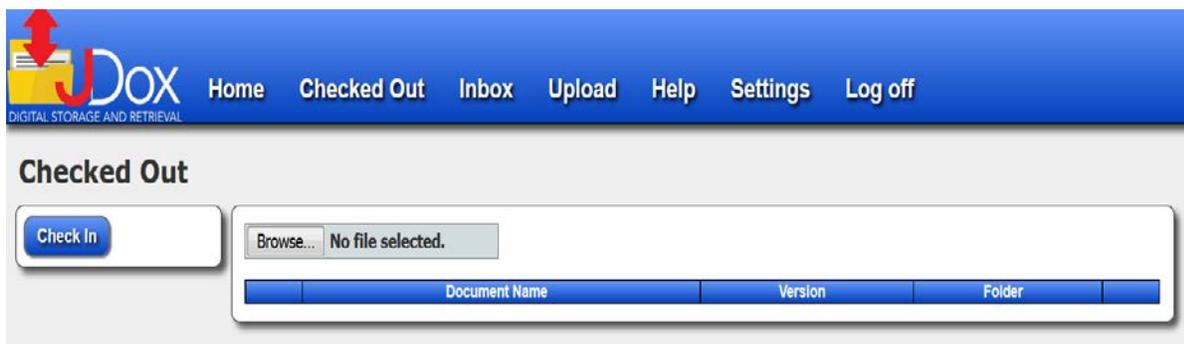
Home

The Home screen, shown below, is the starting point for searching for specific document(s) and is where you will always go to search for documents.



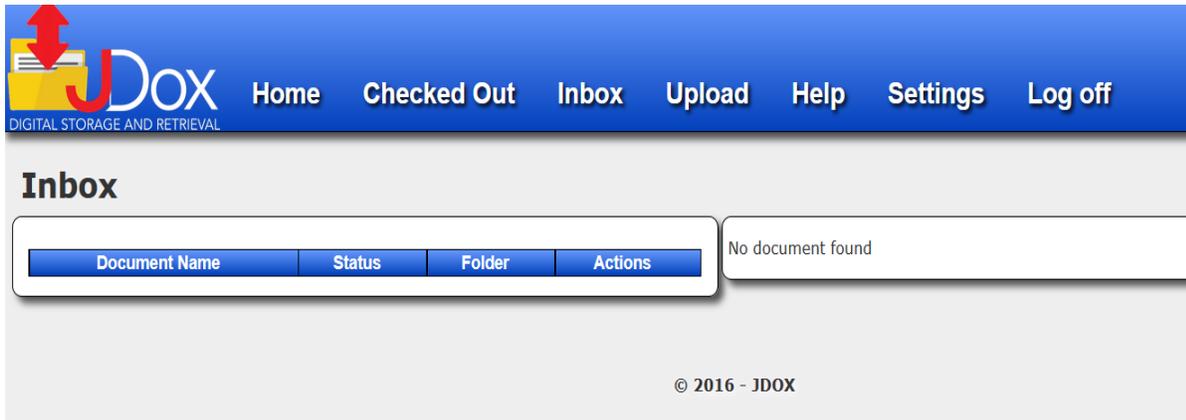
Checked Out

The Checked Out feature allows a user to access documents to edit and to “lock” the document so that only they can make changes or updates while it is Checked Out. When changes have been completed, the document MUST be Checked In so that it is available for others to access. JDox keeps tracks of how many versions are made to a document and this is done via the Checked Out and Check In function.



Inbox

The Inbox lists all pending documents that have been uploaded. This is where the user assigns the metadata or schema location to save the document to.

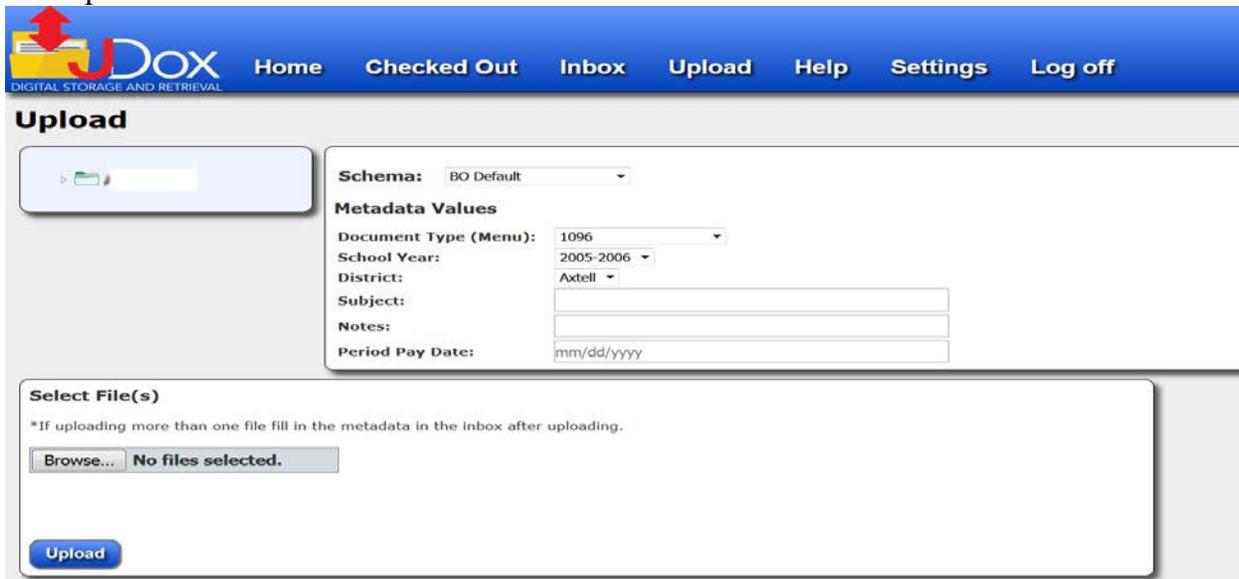


Upload

The Upload Feature allows you to upload either scanned or digital documents into JDox. Please refer to the Naming Limitations section when saving documents to:

- ✓ Make it easier to find documents
- ✓ Avoid potential errors uploading (and downloading) documents by not using specific characters (i.e., comma, backslash, etc.)

The Upload Screen is shown below:



Help

JDox offers OnScreen Help, which means if you are working on a particular task and need assistance, you simply need to click on the Help Tab to view the instructions to get through that process. If you prefer personal assistance, there are also contact names and phone numbers for JR3 employees who are ready to assist you.



**To learn more about JDox
visit [training](#)**

For any questions, help or support call:

Bill Kline: 254-759-1902 xt 207

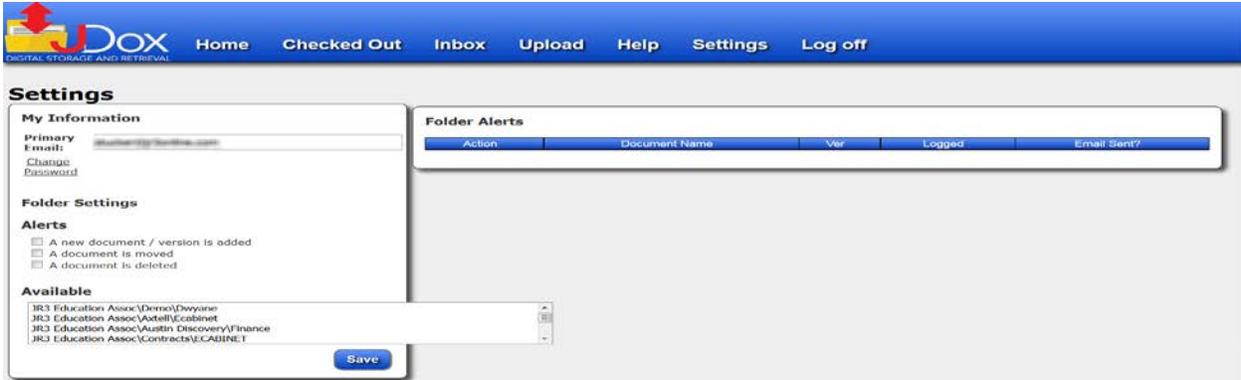
Dwyane Warneke: 254-759-1902 xt 215

Thank You - JDox Support Team

[Home](#)

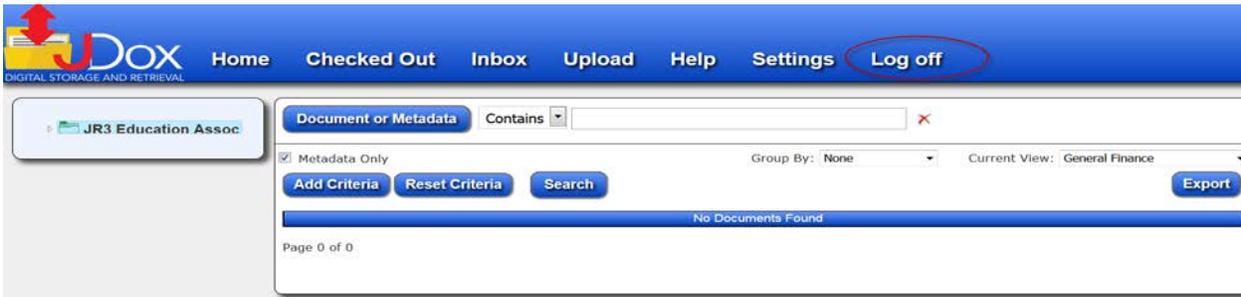
Settings

Settings contain information that is specific to each user and allows you to change your password and/or receive alerts.



Log Off

Always Log Off when you are finished. This will ensure your JDox account remains secure.



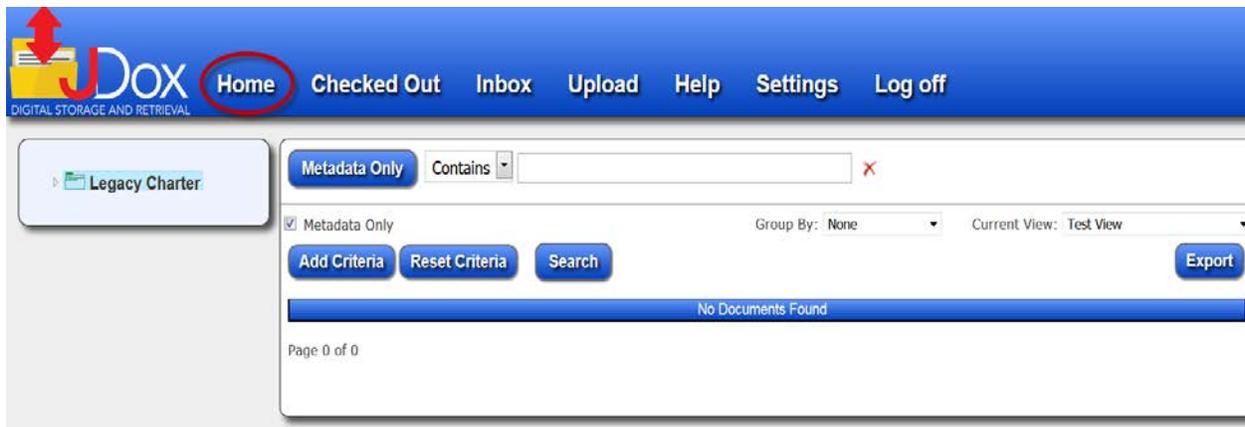
You will be taken to the JDox Login Screen, which is how you can verify you have successfully logged off.



Chapter 3

Home Tab & Searching for Documents

The Home Tab is where you search for files and documents.



File storage in JDox is structured the same as they would be with paper files at your school.

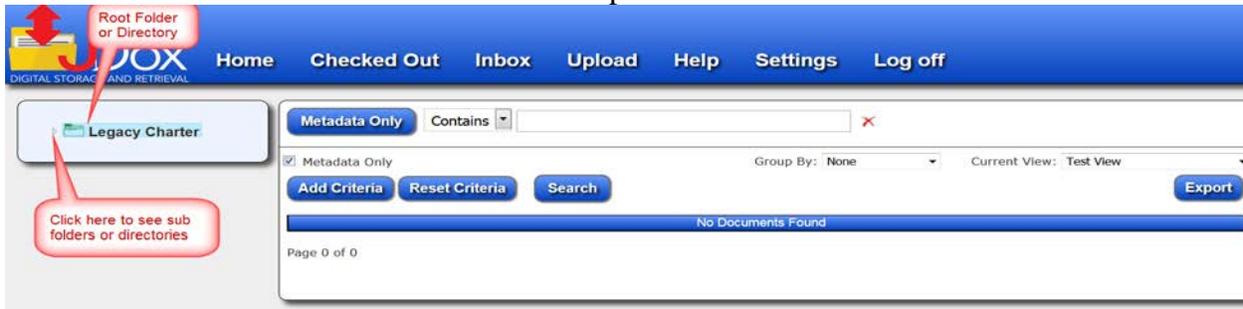
- Root Directory = School Name/Building
- Sub Directory = Which file cabinet they are in (i.e., Student Records, Admin., etc.).
- Sub Level 2 Directory – Which drawer they are in
- Actual File

For large databases (or schools with a lot of documents), it is recommended that you search for files by using the Metadata and/or Schema methods detailed in this chapter.

Searching Folders

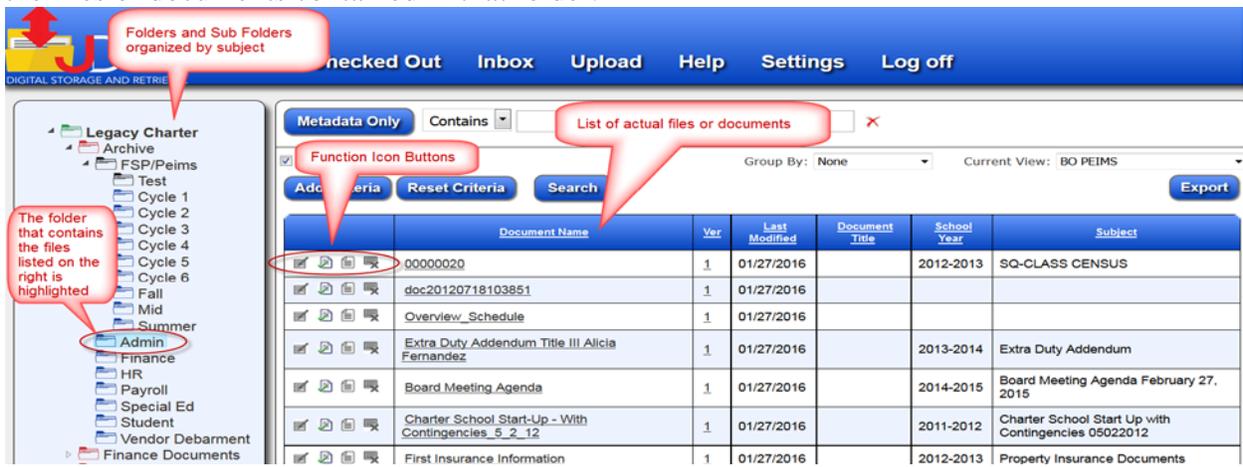
From the *Home* Page, you may locate files by following folder path as follows:

Click on the arrow to the left of the folder to expand to other folders.



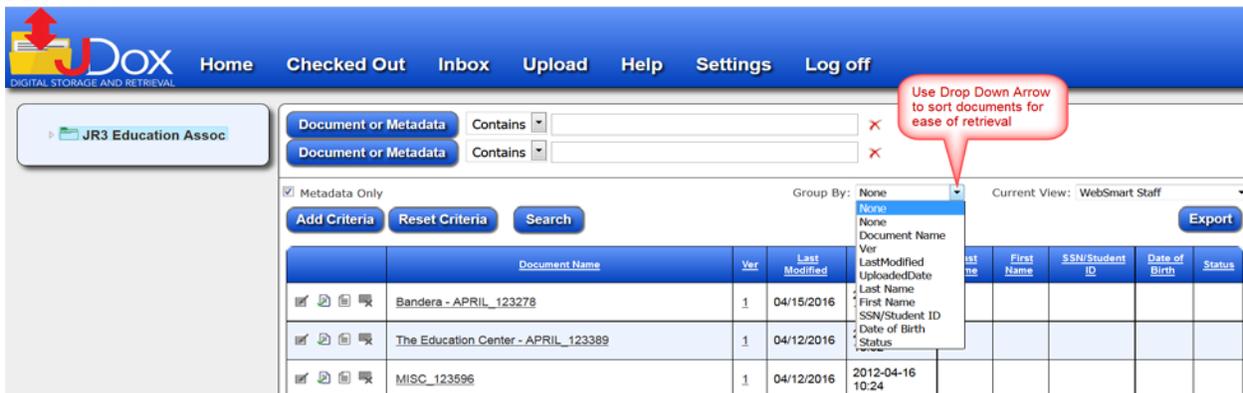
A list of Sub Folders will appear.

Click on the arrows to the left of the Folder name to see more directories and/or to get a list of the files or documents contained in that folder.



Sorting document list

The *Group By* box has a drop down arrow so that you may sort documents in a variety of ways based on the Schema used in the view. It will display the documents saved in that group or Metadata.



Group By options are the same as the document headings.

Group By options are the same as the headings shown below.

Document Name	Ver	Last Name	First Name	FEIN/SSN	Student Document Filter	Schema Name	Folder Path
(10-15-15 Pay Date) Courses - Extra Duty Form20151008_09370802	1					BO Payroll	Legacy Charter\To JR3\Processed Not Archived\CYA
(10-15-15 Pay Date) Mesquite Absence Forms20151008_11220919	1					BO Payroll	Legacy Charter\To JR3\Processed Not Archived\CYA

You may also locate or sort documents by clicking on any heading.

Click on any heading to sort by that item

Document Name	Ver	Last Name	First Name	FEIN/SSN	Student Document Filter	Schema Name	Folder Path
(10-15-15 Pay Date) Courses - Extra Duty Form20151008_09370802	1					BO Payroll	Legacy Charter\To JR3\Processed Not Archived\CYA
(10-15-15 Pay Date) Mesquite Absence Forms20151008_11220919	1					BO Payroll	Legacy Charter\To JR3\Processed Not Archived\CYA
(10-15-15 Pay Date) Plano Absence Forms20151007_21005466	1					BO Payroll	Legacy Charter\To JR3\Processed Not Archived\CYA

You may choose the order you want documents sorted by, such as A-Z or Z-A. Each time you click on the heading title, it changes the order the documents are shown in.

Click to Sort by Last Name. Click again to change the order (i.e., A-Z or Z-A)

Default

Document Name	Ver	Last Name	First Name	FEIN/SSN	Student Document Filter	Schema Name	Folder Path
Zuniga Arihanda Medical In Attendance	1	Zuniga-Aguilar	Arihanda	640-70-2443		BO Staff/Student	Legacy Charter\Student Documents\Uploaded Documents
zimmerman lillian 04062008 P.legacy forms	1	zimmerman	lillian	630-15-1703		BO Staff/Student	Legacy Charter\To JR3\Student
Zeravica Marijana 08252008	1	Zeravica	Marjana	630-17-8602		BO Staff/Student	Legacy Charter\Student Documents\Uploaded Documents

Current View Options

The *Current View* box will display all of the documents in that category (or schema).

Use the Drop Down Arrow to sort and view groups of documents such as payroll, financial, etc

Document Name	Ver	Last Modified	Uploaded Date	Subject
Bandera - APRIL_1233278	1	04/15/2016	2012-04-11 12:13	April Monthly Maintenance, Support, Software, Monthly Users License
The Education Center - APRIL_123389	1	04/12/2016	2012-04-12 10:32	April 2012 WebSmart Services
MISC_123595	1	04/12/2016	2012-04-16 10:24	
Olmstead-Kirk Paper Company_123599	1	04/12/2016	2012-04-16 10:24	Paper
White Oak ISD - APRIL_123619	1	04/12/2016	2012-04-16 11:05	Billing for April Payroll
All Benefits Consultants, Inc_123639	1	04/12/2016	2012-04-16 11:38	

Documents may be filtered even more by using the *Group By* option (which is metadata).

After selecting a Current View category, you may also Group By. Note the Group By options are the same as the Headings.

Document Name	Ver	Document Type (Menu)	School Year	Notes	Period Pay Date
(10-15-15 Pay Date) Courses - Extra Duty Form20151008_09370802	1		2014-2015		
(10-15-15 Pay Date) Mesquite Absence Forms20151008_11220919	1		2014-2015		
(10-15-15 Pay Date) Plano Absence Forms20151007_21005466	1		2014-2015		

The *Group By* categories are the same as the Headings.

JDox Home Checked Out Inbox Upload Help Settings Log off

Legacy Charter
 Archive
 Finance Documents
 Student Documents
 To JR3
 To Legacy
 Uploaded Documents

Metadata Only Contains [] X

Metadata Only Add Criteria Reset Criteria Search Export

Group By: None Current View: BO Payroll

Document Name	Ver	Document Type (Menu)	School Year	District	Subject	Notes	Period Pay Date
(10-15-15 Pay Date) Courses - Extra Duty Form20151008_09370802	1		2014-2015				
(10-15-15 Pay Date) Mesquite Absence Forms20151008_11220919	1		2014-2015				
(10-15-15 Pay Date) Plano Absence Forms20151007_21005466	1		2014-2015				

You may choose the order you want documents sorted by, such as A-Z or Z-A. Each time you click on the heading, it will change the order the documents are displayed in.

JDox Home Checked Out Inbox Upload Help Settings Log off

Legacy Charter
 Archive
 Finance Documents
 Student Documents
 To JR3
 To Legacy
 Uploaded Documents

Metadata Only [] X

Metadata Only Add Criteria Reset Criteria Search Export

Group By: None Current View: BO Payroll

Document Name	Ver	Document Type (Menu)	School Year	District	Subject	Notes	Period Pay Date
Zuniga Arihanda Medical In Attendance	1						
zimmerman lillian 04062008 P legacy forms	1			Legacy Charter			
zeravica petar 05172010 enroll 15-16 M	1						
Zeravica Marjana 08252008	1						

Document Details

If you are not sure this is the specific document you want to Check Out, edit, etc., you may click on the “Details Icon Button” to get more information about the document.

After viewing the details, you can either Edit the document or go Back to Search by clicking the correct option at the bottom of the screen.

Document

CheckedOutBy :
FileName : Legacy Preparatory SC5000 - Schoolwide FINAL 2015-2016
FolderId : (35) General Ledger
SchemaId: (52) WebSmart-Ledger
Uploadedby : Legacy User5
UploadedDate 2015-06-01 17:24

Metadata

SystemId 5
Description 2015-2016 Fiscal Year

[Edit](#) | [Back to Search](#)

Click on the file name of the document you want to view or edit.

Legacy Charter

- Archive
 - FSP/Peims
 - Test
 - Cycle 1
 - Cycle 2
 - Cycle 3
 - Cycle 4
 - Cycle 5
 - Cycle 6
 - Fall
 - Mid
 - Summer
 - Admin**
 - Finance
 - HR
 - Payroll
 - Special Ed
 - Student
 - Vendor Debarment
 - Finance Documents

Metadata Only Contains []

Group By: None Current View: BO PEIMS

[Add Criteria](#) [Reset Criteria](#) [Search](#) [Export](#)

	Document Name	Ver	Last Modified	Document Title	School Year	Subject
	00000020	1	01/27/2016		2012-2013	SQ-CLASS CENSUS
	doc20120718103851	1	01/27/2016			
	Overview_Schedule	1	01/27/2016			
	Extra Duty Addendum Title III Alicia Fernandez	1	01/27/2016		2013-2014	Extra Duty Addendum
	Board Meeting Agenda	1	01/27/2016		2014-2015	Board Meeting Agenda February 27, 2015
	Charter School Start-Up - With Contingencies_5_2_12	1	01/27/2016		2011-2012	Charter School Start Up with Contingencies 05022012
	First Insurance Information	1	01/27/2016		2012-2013	Property Insurance Documents

Using Schema to Search Folders

The Current View is the Schema. Use the drop down arrow to select the category to search.

The screenshot shows the JDox interface with a search bar containing 'Contains'. A red callout bubble points to the search bar with the text 'Click Search'. Another red callout bubble points to the 'Current View' dropdown menu, which is open and lists various schema categories. The 'Current View' dropdown is currently set to 'WebSmart Purchasing'. The search results area shows 'No Documents Found' and 'Page 0 of 0'. The footer indicates '© 2016 - JDox'.

The search will give a list of all the files in the selected option.

The screenshot shows the JDox interface with search results for 'BO Finance View'. The search bar contains 'Contains'. The 'Current View' dropdown is set to 'BO Finance View'. The search results are displayed in a table with the following columns: Document Name, Ver, Document Type (Menu), Vendor Name, Check Date, District, Ck or Pmt Ref #, School Year, and Notes. The table contains four rows of search results.

Document Name	Ver	Document Type (Menu)	Vendor Name	Check Date	District	Ck or Pmt Ref #	School Year	Notes
DCU-Verizon 7.15.13	1						2012-2013	
Enrollment Forms R - S	1						2012-2013	
Dallas Check 1127	1						2014-2015	
Lunch Account May 2015	1						2014-2015	

Using Metadata to Search for Files

Using Metadata search methods, and the Group By box to organize the search results, is a very powerful and useful tool.

Helpful Hints: When using Metadata, if the Metadata Only box is unchecked (it is checked by default), it will search for each word on each page of all documents and will slow down the search process.

Use Drop Down arrow to get a list of metadata categories.

The screenshot shows the JDox interface with a search for 'Document or Metadata' using the 'Contains' operator. A dropdown menu for 'Group By' is open, showing options: None, Document Name, Ver, Document Type (Menu), Vendor Name, Check Date, District, Ck or Pmt Ref #, School Year, and Notes. A red callout bubble points to the dropdown arrow with the text: 'Use the drop down arrow to select Metadata categories'. The table below shows search results for 'DCU-Verizon 7.15.13', 'Enrollment Forms R-S', and 'Dallas Check 1127'.

	Document Name	Ver	Document Type (Menu)	District	Ck or Pmt Ref #	School Year	Notes
<input type="checkbox"/>	DCU-Verizon 7.15.13	1				2012-2013	
<input type="checkbox"/>	Enrollment Forms R-S	1				2012-2013	
<input type="checkbox"/>	Dallas Check 1127	1				2014-2015	

You may also use words or phrases to search Document or Metadata.

The screenshot shows a search for 'Purchasing' in the 'Document or Metadata' field. A red callout bubble above the search box says 'Enter word(s) to search for'. Below the search results, a blue bar displays 'No Documents Found'. A red callout bubble on the left explains: 'Metadata Only box is checked by default. If you uncheck this box, it will search for each word on each page of all documents and slow the search down.' The current view is 'BO Payroll'.

Add Criteria

Enter additional search information in Document or Metadata

Click Search to begin

The screenshot shows two search criteria added: 'Purchasing' and '2016'. A red callout bubble above the second criterion says: '2. The Document or Metadata field will appear. Enter additional criteria to search for.' A red callout bubble points to the 'Add Criteria' button with the text: '1. Click Add Criteria'. Another red callout bubble points to the 'Search' button with the text: '3. Click Search to start searching'. A note at the bottom left states: 'Note: You may add as many criteria as you necessary'. The current view is 'BO Payroll'.

The search will return a list of all of the documents that contain the words “Purchasing” and “2016”

The screenshot shows the JDox web interface. At the top is a blue navigation bar with the JDox logo and links for Home, Checked Out, Inbox, Upload, Help, Settings, and Log off. Below the navigation bar is a search area with two criteria: 'Document or Metadata' containing 'Purchasing' and 'Document or Metadata' containing '2016'. There are buttons for 'Add Criteria', 'Reset Criteria', 'Search', and 'Export'. A table of search results is displayed below, with columns for Document Name, Year, Document Type (Menu), School Year, District, Subject, Notes, and Period Pay Date. A red speech bubble on the left side of the search area contains the text: 'The search will return a list all of the documents that contain the words "Purchasing" and "2016"'. The search results table contains five rows of data.

	Document Name	Year	Document Type (Menu)	School Year	District	Subject	Notes	Period Pay Date
<input type="checkbox"/>	224 NOGA 2015-2016	1						
<input type="checkbox"/>	Forris, Thomas CK# 12715	1	AP Payments	2015-2016	Legacy Charter			
<input type="checkbox"/>	Southwest Air Lines EPAY019938	1	AP Payments	2015-2016	Legacy Charter			
<input type="checkbox"/>	Office Depot CK# 12773	1	AP Payments	2015-2016	Legacy Charter			
<input type="checkbox"/>	SBS Administrative Services CK# 12776	1	AP Payments	2015-2016	Legacy Charter			

You may then select the specific document you are searching for.

Chapter 4

Uploading Documents

You must upload all of your documents in JDox. You can upload either scanned documents or files that are already in digital format.

Getting Started

Create a Scan Folder on your desktop. This will be your file loading platform. Whether you are filing digital documents or scanning hard copies to digital, the Scan Folder on your desktop is your common point of entry to upload files.

Preparing your Digital Documents to Upload

Copy your files to your Scan File folder, making sure to use the appropriate file naming policies. Note: You may also change the filename in the Upload process.

Scanning Hard Copies to Digital Files

Scan your documents and save them to your Scan File Folder, using the appropriate file naming policies. Note: You may also change the filename in the Upload process.

Naming Conventions

While most organizations have standardized ways of naming their files, it is important to avoid the following characters when naming files to upload into WebSmart[®] or JDox to avoid potential uploading errors.

< > , . / \ ? () ! : " ' ~ ` @ # \$ % ^ & * _

If filenames contain any of the special characters listed above, programs can interpret these as operators or functions instead of part of a filename, and therefore cause uploading issues.

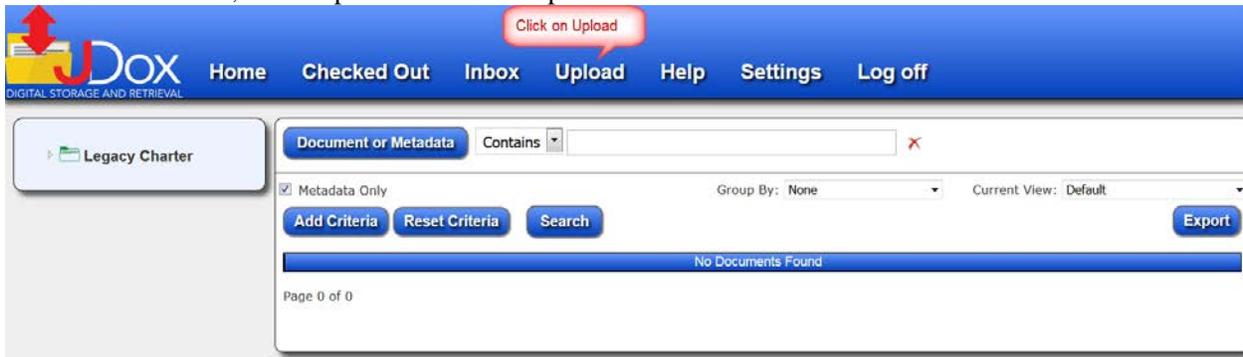
Windows hides the true length of filenames and their absolute paths; therefore, long filenames can also be problematic. Try to limit the characters in the name of the file.

Naming Paths

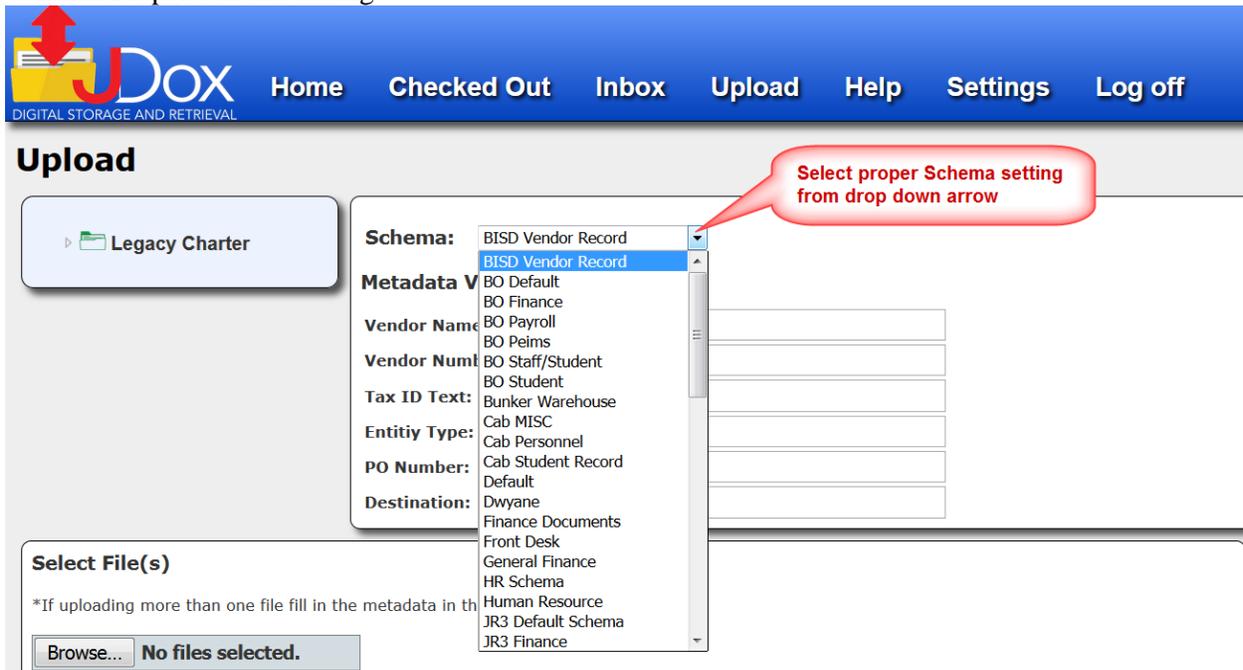
To get the most of the Metadata and Schema search features, it is highly recommended that you develop a file naming policy. When files are stored, or uploaded, to JDox, use Metadata or Schema paths that will save like documents in folders.

Uploading Single Documents

At the home screen, select upload button on top task bar.



Confirm Proper Schema setting



Select Correct Landing Folder

Click the bubble for the landing folder you want to search or highlight the root or sub folder

Click on the "Browse" button and choose a file from your scans folder.

Click on the "Browse" button and navigate to your Scan Folder to select a file to upload

Select the file you want to upload from your Scan Folder. The selected filename will be displayed as shown below:

Select File(s)

*If uploading more than one file fill in the metadata in the inbox after uploading.

Browse... General Ledger Outline.docx

Document Name: General Ledger Outline.docx

Upload

The selected file name will appear in both places.

Fill out as many of the metadata fields as possible.

Metadata fields that have an () are mandatory. If they are not mandatory, it is highly recommended they be used, as they can be very helpful when searching for the document at a later time.*

JDox DIGITAL STORAGE AND RETRIEVAL

Home Checked Out Settings Log off

Upload

Legacy Charter

Schema: Finance Doc

Metadata Values

Vendor/Customer Name	<input type="text"/>
PO Number	<input type="text"/>
Document Type (Menu)	1096
Finance Doc Type Text	<input type="text"/>
Ck or Pmt Ref #	<input type="text"/>
Invoice No	<input type="text"/>
FEIN/SSN	<input type="text"/>
Subject	<input type="text"/>
Summary	<input type="text"/>
Fiscal Year	<input type="text"/>
Date	mm/dd/yyyy
Destination	<input type="text"/>

Fill out as many of the Metadata fields as possible. While it is not mandatory, it is very helpful when searching for the document at a later time.

Click on the Upload Button

The screenshot shows the JDox web application interface. At the top is a blue navigation bar with the JDox logo (DIGITAL STORAGE AND RETRIEVAL) and menu items: Home, Checked Out, Inbox, Upload, Help, Settings, and Log off. Below the navigation bar is the 'Upload' section. On the left, there is a 'Legacy Charter' button. To its right, the 'Schema' is set to 'BISD Vendor Record'. Below this is a 'Metadata Values' section with input fields for Vendor Name, Vendor Number, Tax ID Text, Entity Type, PO Number, and Destination. At the bottom of the upload area is a 'Select File(s)' box. It contains a 'Browse...' button next to the file 'General Ledger Outline.docx'. Below the file name is a 'Document Name' field containing 'General Ledger Outline.docx'. At the bottom left of this box is an 'Upload' button, which is highlighted with a red callout bubble containing the text 'Click Upload'.

You will get the following message asking you to choose a folder, if you have not already selected a folder from the landing folder. The pop up window is asking you to select a folder to save the document to.

This screenshot shows the same JDox upload interface as the previous one, but with a 'Choose a folder' pop-up window overlaid on the right side. The 'Schema' is now 'WebSmart-Ledger'. The 'Metadata Values' section shows 'SystemId' and 'Description' (2015-2016 Test Doc) fields. The 'Select File(s)' box remains the same, with the 'General Ledger Outline.docx' file selected and the 'Upload' button visible. The 'Choose a folder' pop-up window is a simple white box with the text 'Choose a folder' and an 'OK' button at the bottom right.

Select a folder

Upload

- 1. Click the arrow to the left of the root folder to get a list of other folders.
- 2. Click to the left of the sub-folder to get a list of subject folders
- 3. Click the bubble to select where you want the file to go (the bubble will then be shaded in)
- 4. Click Upload

JDox always gives you verification that a file has been uploaded.

Uploaded Files Files Uploaded.

General Ledger Outline.docx

Verifies the name of the document uploaded

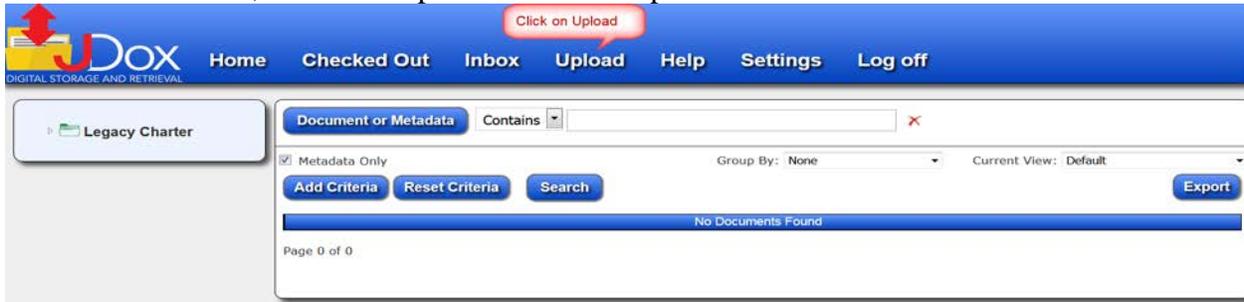
© 2016 - JDOX

Once your file has successfully been uploaded to JDox, delete the file from your Scan folder.

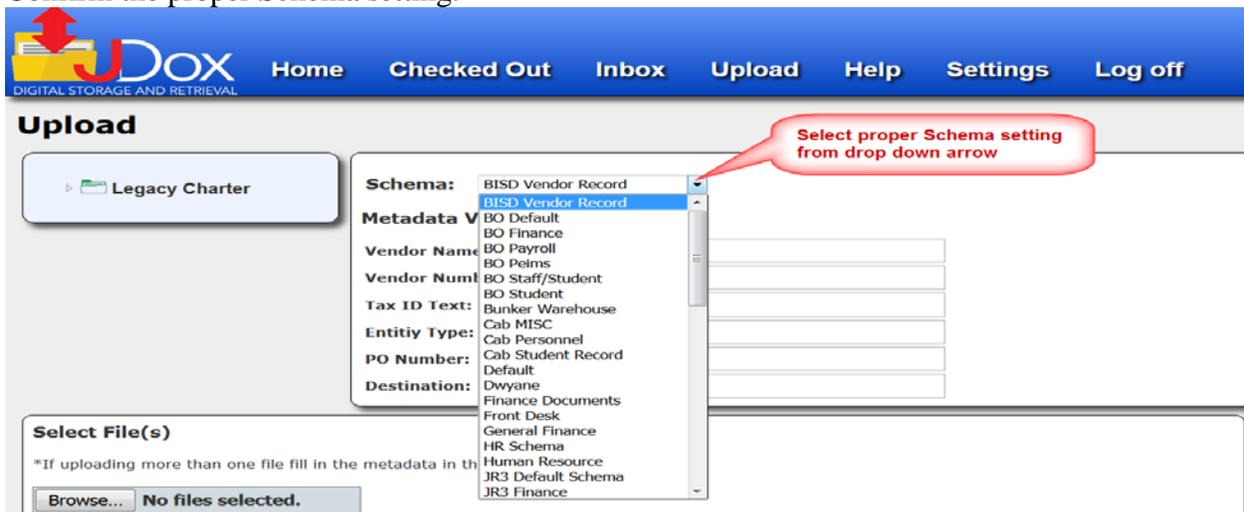
Upload Multiple Documents via InBox

You can add multiple documents at once provided all documents go to the same folder.

At the home screen, select the Upload button on top task bar.



Confirm the proper Schema setting.



Select Correct Landing Folder

The screenshot shows the JDox 'Upload' interface. At the top is a blue navigation bar with the JDox logo and the text 'DIGITAL STORAGE AND RETRIEVAL'. Navigation links include 'Home', 'Checked Out', 'Inbox', 'Upload', 'Help', and 'Set'. Below the navigation bar, the page title is 'Upload'. A red callout bubble points to the 'Legacy Charter' folder in a tree view on the left, containing a sub-tree with folders like 'Admin', 'Finance', 'HR', 'Payroll', 'Special Ed', 'Student', and 'Vendor Debarment'. To the right of the tree are fields for 'Schema' (set to 'WebSmart-Ledger'), 'Metadata Values' (with 'SystemId' and 'Description' input fields), and a 'Select File(s)' section with a 'Browse...' button and 'No files selected.' text. An 'Upload' button is at the bottom right.

Choose the files from your scans folder

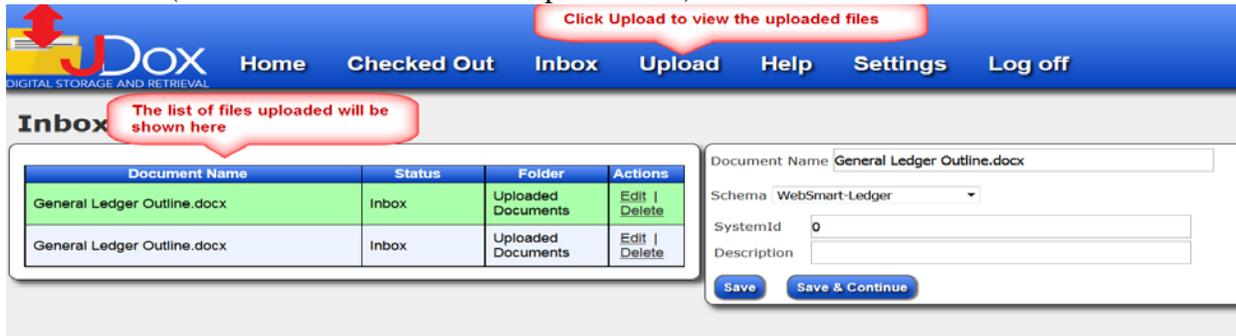
This screenshot shows the 'Upload' page with the 'Legacy Charter' folder selected in the left sidebar. The 'Schema' is 'WebSmart-Ledger'. The 'Metadata Values' section has 'SystemId' and 'Description' input fields. The 'Select File(s)' section shows a 'Browse...' button with '2 files selected.' next to it. A red callout bubble points to this button with the text: 'Note: It will tell you how many files you have selected to upload and not the individual file names'. Another red callout bubble points to the 'Upload' button with the text: 'Click on Upload'.

JDox will confirm the documents were uploaded.



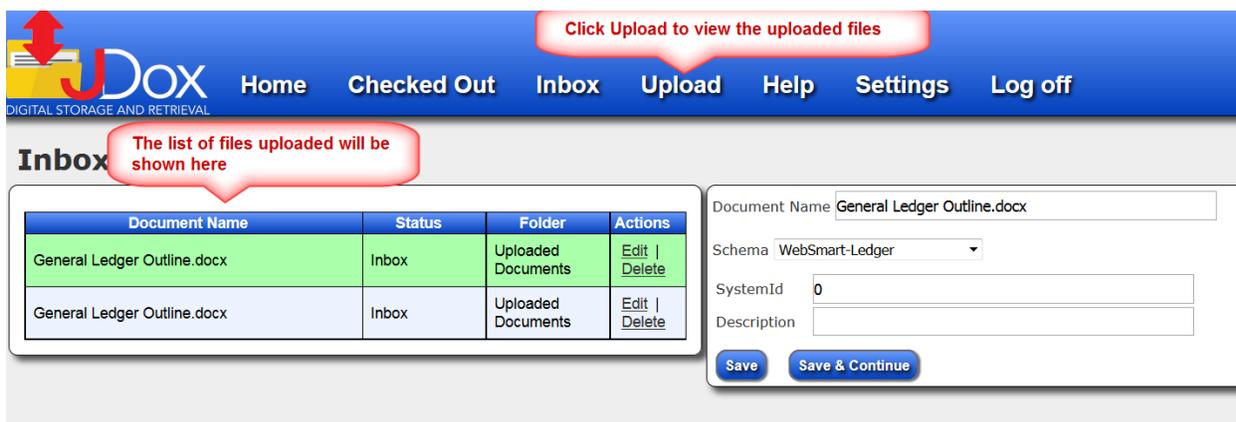
Note that when uploading multiple documents, the documents go to the inbox

Go to Inbox (click on Inbox at menu on top of screen)



For each document, you will enter the metadata, then click on save and continue until all documents in the list have been saved

Note: If you just click on “save” it will simply save the file. If you click on “Save and Continue”, it will save the document that you just finished and it will open up the next file to type in the metadata.



Once your documents have been uploaded to JDox, delete the files on your computer from your Scan folder so that you will know it has been uploaded.

Chapter 5

Checked Out Feature

JDox has a unique feature that allows users to “Check Out” documents just like you would check out books in a library. The benefit is that no two users may be editing or working in a document at the same time.

How to Check Documents Out

From the Home tab, select the folder(s) that contains your document

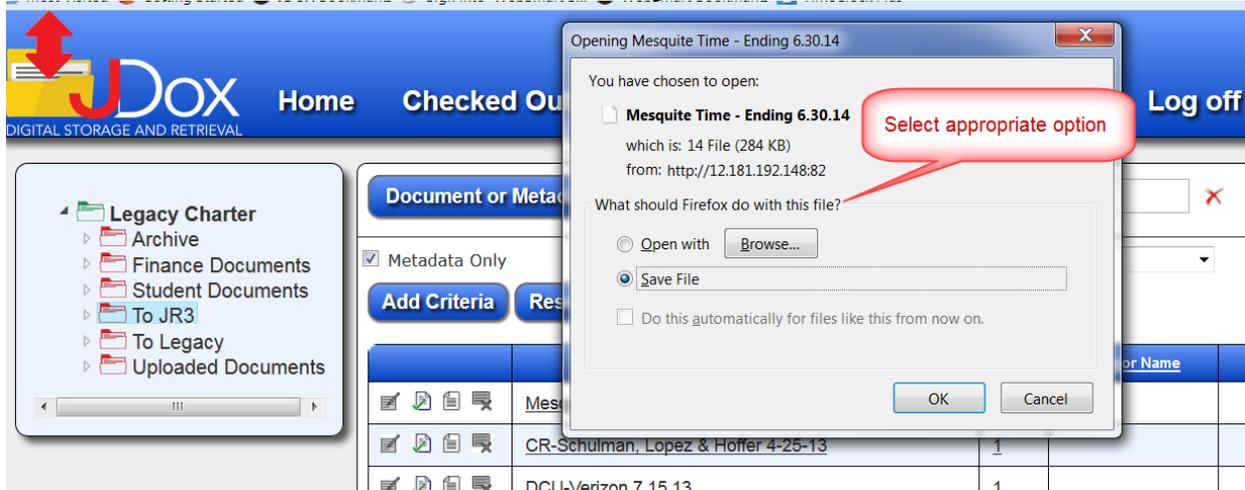
Locate the document you want to check out.

Helpful Hint: If you see a file that has a circle with a line through it, it means that the file is checked out. If you look at the details of that file, you will see who has checked it out.

Select the second icon to left of document (checkout).

	Document Name	Ver	Vendor Name	PO Number	Invoice No	Status
<input checked="" type="checkbox"/>	Mesquite Time - Ending 6.30.14	1				
<input checked="" type="checkbox"/>	CR-Schulman, Lopez & Hoffer 4-25-13	1				
<input checked="" type="checkbox"/>	DCU-Verizon 7.15.13	1				

Select what you want to do with the file, such as Open or Save.



By Default the file will be found in your Downloads folder if you choose to save it.

If you choose to Open with Browser, it should automatically open in word, excel, PDF, etc.

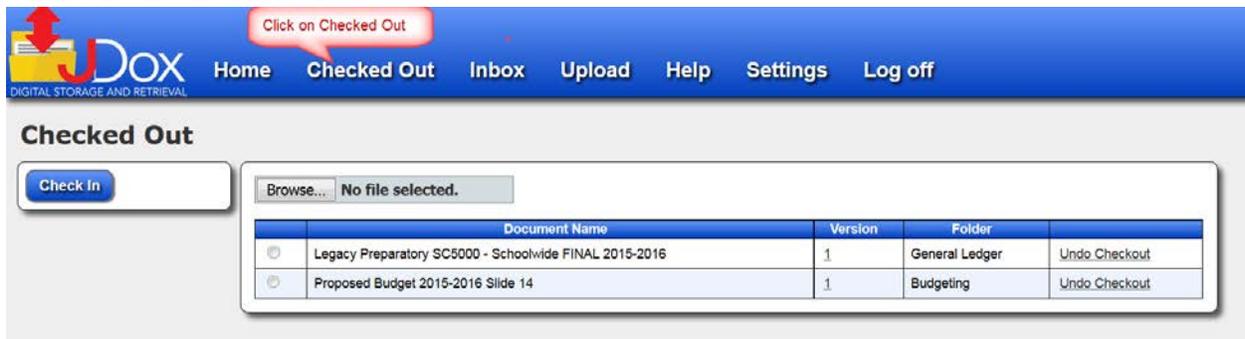
With the file open, make the changes and then save

Go to Checked Out on menu and check in file

Checked Out Tab – Verification

Go to the Checked Out tab to see a list of the documents you have checked out. Reviewing your Checked Out documents frequently will ensure you do not have documents checked out that others may need to use or that you may have forgotten to check back in.

Click on **Checked Out** Tab



A list of documents you have checked will display.

Notice that there is an Undo Check Out and also a Check In option.

Undo Checkout if you checked out the document in error or did not make any changes to it.

The screenshot shows the JDox interface with the 'Checked Out' section. A callout bubble points to the 'Undo Checkout' links in the table.

	Document Name	Version	Folder	
<input type="radio"/>	Legacy Preparatory SC5000 - Schoolwide FINAL 2015-2016	1	General Ledger	Undo Checkout
<input type="radio"/>	Proposed Budget 2015-2016 Slide 14	1	Budgeting	Undo Checkout

Checking Documents In

After a change has been made to a document, it will need to be Checked In for the version number to change. This is JDox's way of tracking how many times, and by whom, a document has been revised.

To check a document in, select Browse, locate the file and Click on Check In.

The screenshot shows the JDox interface with the 'Checked Out' section. A callout bubble points to the 'Check In' button, and another points to the 'Browse' button.

	Document Name	Version	Folder	
<input checked="" type="radio"/>	General Ledger Outline.docx	1	Uploaded Documents	Undo Checkout
<input type="radio"/>	Proposed Budget 2015-2016 Slide 14	1	Budgeting	Undo Checkout

The document is no longer shown in the Checked Out list

The screenshot shows the JDox interface with the 'Checked Out' section. A callout bubble points to the 'Check In' button.

	Document Name	Version	Folder	
<input type="radio"/>	Proposed Budget 2015-2016 Slide 14	1	Budgeting	Undo Checkout

The document is now shown in the original folder. The version has changed from 1 to 2.

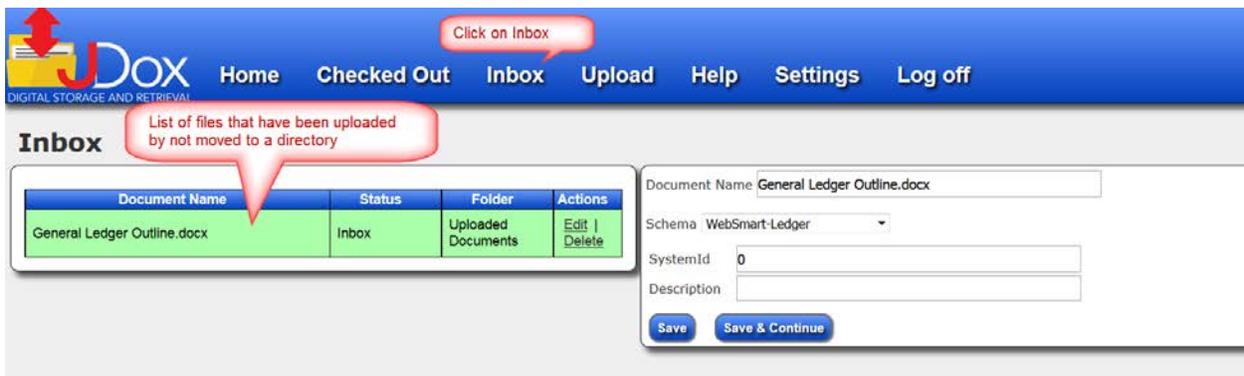
The screenshot shows the JDox web interface. At the top is a blue navigation bar with the JDox logo and menu items: Home, Checked Out, Inbox, Upload, Help, Settings, and Log off. Below the navigation bar is a search area with a dropdown menu set to 'Contains' and a search input field. A sidebar on the left shows a folder tree under 'Legacy Charter', with 'Uploaded Documents' circled in red. The main content area displays a table of documents. The table has columns for Document Name, Ver, Last Name, First Name, FEIN/SSN, Student Document Filter, Schema Name, and Folder Path. Three rows are visible, all for 'General Ledger Outline.docx'. The first two rows have 'Ver' 1, and the third row has 'Ver' 2. A red callout box points to the third row with the text: 'The document is back in the appropriate folder and notice the Version has changed to 2'. The 'Folder Path' for all rows is 'Legacy Charter/Finance Documents/Uploaded Documents'. Below the table, it says 'Page 1 of 1'.

	Document Name	Ver	Last Name	First Name	FEIN/SSN	Student Document Filter	Schema Name	Folder Path
<input checked="" type="checkbox"/>	General Ledger Outline.docx	1					WebSmart-Ledger	Legacy Charter/Finance Documents/Uploaded Documents
<input checked="" type="checkbox"/>	General Ledger Outline.docx	1					WebSmart-Ledger	Legacy Charter/Finance Documents/Uploaded Documents
<input checked="" type="checkbox"/>	General Ledger Outline.docx	2					WebSmart-Ledger	Legacy Charter/Finance Documents/Uploaded Documents

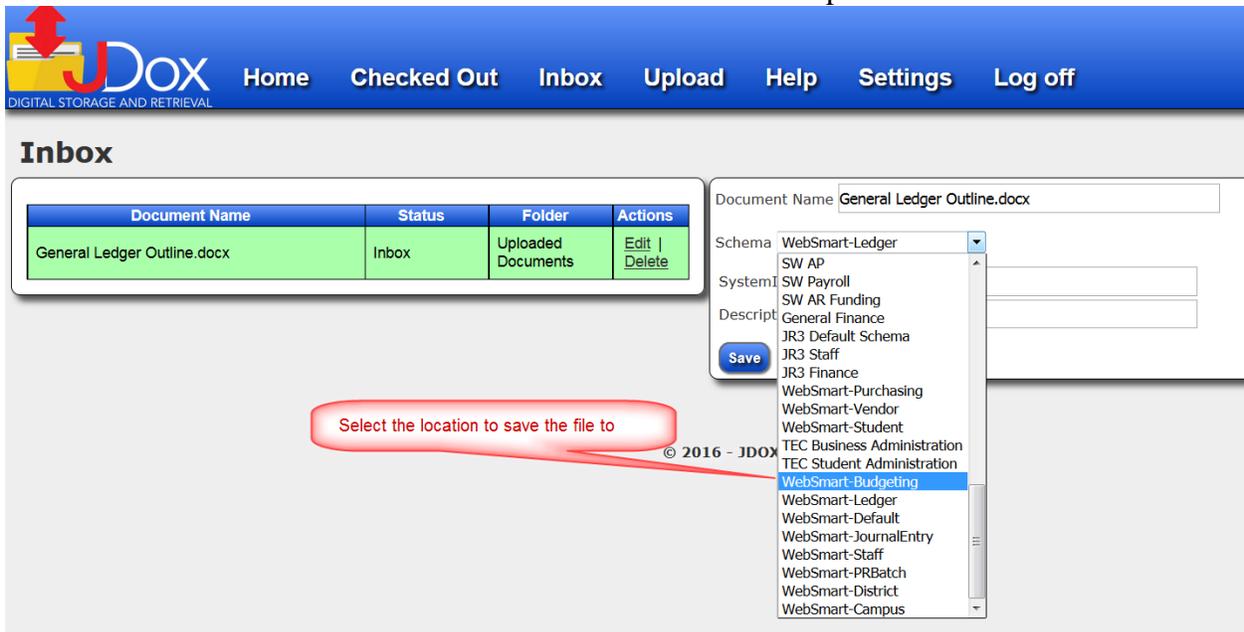
Chapter 6

Inbox

The Inbox is where documents that have been uploaded but not yet moved to a folder are shown.



Select the Schema location to save the document to from the drop down arrow.



You may rename the file if necessary

Click Save & Continue

The screenshot shows the JDox interface with a blue header containing the logo and navigation links: Home, Checked Out, Inbox, Upload, Help, Settings, Log off. Below the header, the 'Inbox' section features a table with the following data:

Document Name	Status	Folder	Actions
General Ledger Outline.docx	Inbox	Uploaded Documents	Edit Delete

To the right of the table is a form for document details:

- Document Name: General Ledger Outline.docx
- Schema: WebSmart-Ledger
- SystemId: 0
- Description: (empty)

 At the bottom of the form are two buttons: 'Save' and 'Save & Continue'. A red callout bubble points to the 'Save & Continue' button with the text 'Click Save & Continue'. Another red callout bubble points to the 'Document Name' field with the text 'You may rename the file from this location'.

The file is no longer shown in the Inbox

The screenshot shows the JDox interface with the same blue header. The 'Inbox' section now displays a table with the following data:

Document Name	Status	Folder	Actions
No document found			

The file upload process has been completed and the file is now available for other approved users to access through Metadata, Schema or the Folder path located on the left of the screen.

The screenshot shows the JDox search results page. The blue header is present. On the left, a navigation tree is visible with 'Legacy Charter' selected and circled in red. The main content area shows search results for 'General Ledger Outline.docx'.

Search filters include:

- Document or Metadata: Contains
- Metadata Only: checked
- Buttons: Add Criteria, Reset Criteria, Search, Export
- Current View: Default

The search results table is as follows:

Document Name	Version	Last Name	First Name	FEIN/SSN	Student Document Filter	Schema Name	Folder Path
General Ledger Outline.docx	1					WebSmart-Ledger	Legacy Charter/Finance Documents/Uploaded Documents

A red callout bubble points to the first row of the table with the text: 'The file is now fully uploaded and available for other approved users to access.'

Chapter 7

Export

The Export feature is a powerful tool that allows the users to export data or files into another format, such as a spreadsheet and is similar to making a copy of a document or organizing multiple documents into one formation. You will see the metadata information in columns in the spreadsheet when you export the information. An example would be to export all School Year 2015-2016 Purchase Orders into one spreadsheet for reference purposes.

You may use the export data to capture the grid view of your screen to a spreadsheet. You will see the metadata information in columns in the spreadsheet when you export.

Exporting Data

Exporting Data allows you to search for associated documents, such as Purchase Orders, and move the list to a spreadsheet.

Select the folder to search

Enter the phrase or word in Document or Metadata

Add additional criterial to filter the search

Click on Search

The screenshot shows the JDox web interface. On the left is a navigation tree with folders like 'Legacy Charter', 'Archive', 'Finance Documents', etc. The main area has search filters: 'Document or Metadata' dropdowns with 'Purchase' and '2015-1016' entered. Below are 'Add Criteria', 'Reset Criteria', and 'Search' buttons. A table of results is displayed below, with columns for Document Name, Ver, Vendor Name, PO Number, Invoice No, Status, Requestor, Bill To Facility, and Ship To Facility. The table contains five rows of purchase order data.

	Document Name	Ver	Vendor Name	PO Number	Invoice No	Status	Requestor	Bill To Facility	Ship To Facility
<input checked="" type="checkbox"/>	CR-Symonds Flags & Poles Purchase Order 000007 - 8-16-12	2	Symonds Flags & Poles						
<input checked="" type="checkbox"/>	00000025	1	VERIZON WIRELESS (EPAY)						
<input checked="" type="checkbox"/>	CR-C. Robinson 8-23-12	2	Charlotte Robinson						
<input checked="" type="checkbox"/>	Check 1088 and CICis purchase	1							
<input checked="" type="checkbox"/>	CR-Insect Lore 11-15-12 (purchase order 000037)	1							

Once you have the list, click on Export

The screenshot shows the JDox web application interface. At the top is a navigation bar with links: Home, Checked Out, Inbox, Upload, Help, Settings, Log off. Below the navigation bar is a search area with two filter boxes: 'Document or Metadata' containing 'Purchase' and another containing '2015-1016'. There are buttons for 'Add Criteria', 'Reset Criteria', and 'Search'. A table of search results is displayed with columns: Document Name, Ver, Vendor Name, PO Number, Invoice No, Status, Requestor, Bill To Facility, and Ship To Facility. The first row shows 'CR-Symonds Flags & Poles Purchase Order 000007 - 8-16-12' with 'Ver' 2 and 'Vendor Name' 'Symonds Flags & Poles'. The second row shows '00000025' with 'Ver' 1 and 'Vendor Name' 'VERIZON WIRELESS (EPAY)'. An 'Export' button is located at the bottom right of the table area. A red callout bubble points to the 'Export' button with the text 'Click on Export'.

A pop up window will appear asking if you want to “Open” or “Save.” Recommend Opening results

The screenshot shows the JDox web application interface with a file export dialog box open. The dialog box title is 'Opening file' and it contains the text: 'You have chosen to open: exp...csv which is: Microsoft Excel Comma Separated Values File (1.7 KB) from data:'. Below this, it asks 'What should Firefox do with this file?' and has two radio button options: 'Open with Microsoft Excel (default)' (which is selected) and 'Save File'. There is also a checkbox for 'Do this automatically for files like this from now on.' and 'OK' and 'Cancel' buttons. A red callout bubble points to the 'Open with' option with the text 'Either Open with option or Click on Save File (To see export results, Open With Option)'. The background shows the same search results table as the previous screenshot.

If you Open the file, it should look similar to the example below.

Document Name	Ver	Vendor Name	PO Number	Invoice No	Status	Requestor	Bill To Facility	Ship To Facility
CR-Symonds Flags & Poles Purchase Order	25	2 Symonds Flags & Poles						
		1 VERIZON WIRELESS (EPAY)						
CR-C. Robinson 8-23-12		2 Charlotte Robinson						
Check 1088 and CiCis purchase		1						
CR-Insect Lore 11-15-12 (purchase order)		1						

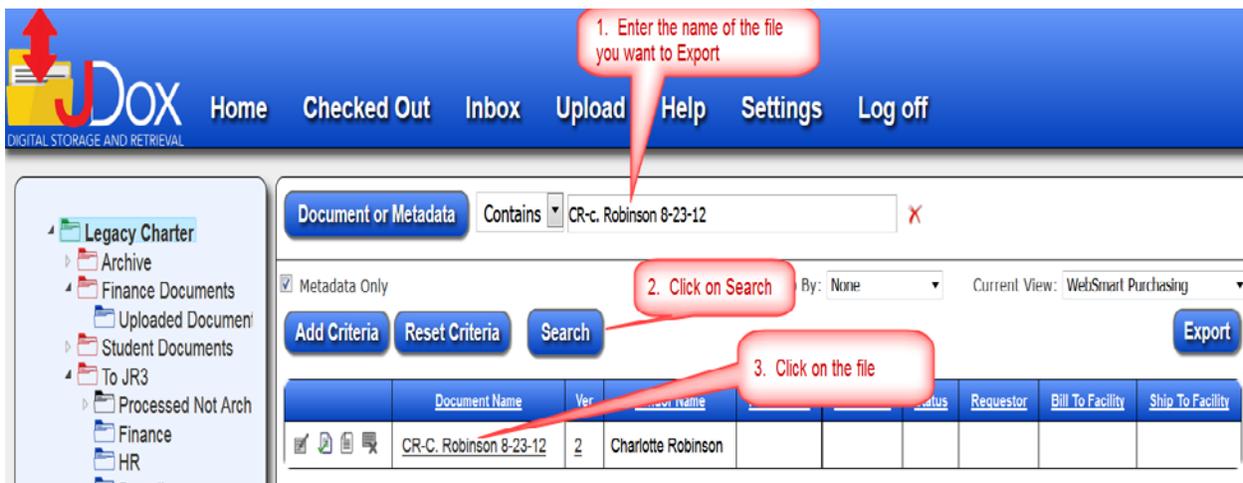
Exporting Documents

Exporting Documents enables you to extract or make a copy of a document or file.

Enter the file name in the Document or Metadata or enter key word.

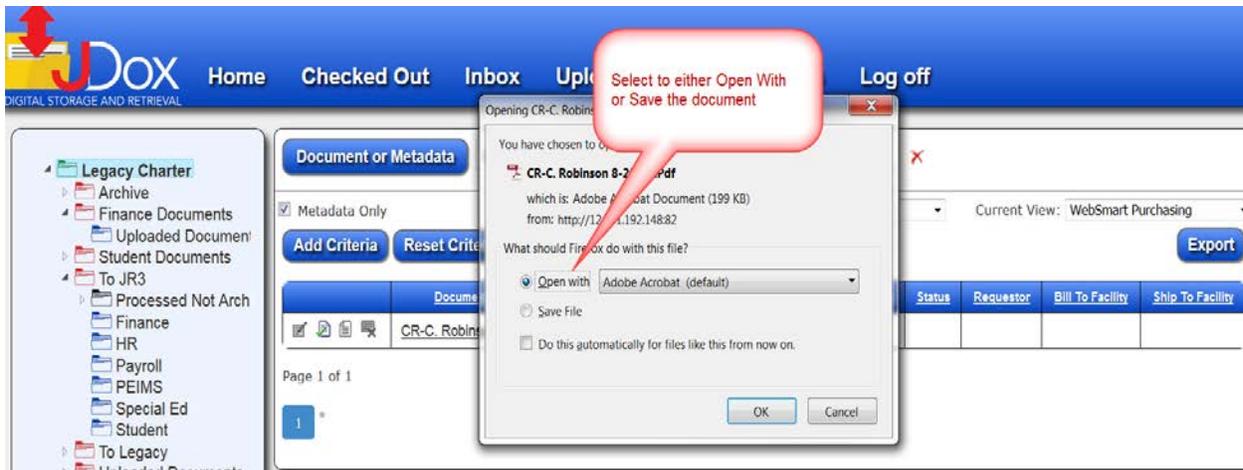
Click on Search

When the results are displayed, click on the document you want to export.



From the pop up screen, select to either Open With or Save the file.

Click "OK"



If you choose to Open the file, you will see the actual document.

LEGACY CHECK REQUEST FORM

Make Check Payable to:

Vendor: Charlotte Robinson	Amount: \$128.22	Date Needed: 8/23/2012
Address 3533 Apple Blossom Ln.	City/State/ Zip McKinney, TX 75070	

Please give a general description below of items or services received for this payment.

Reimbursement for purchase of classroom reading books:	
Half Price Books	36.70
Half Price Books	91.52
(See supporting documentation)	
<div style="border: 1px solid red; padding: 2px;">420-11-6399.00-003-2-11-0-00</div>	

You may then save the file to your desktop or other desired location.

Chapter 8

Settings

The Settings Tab allows you to change your password as well as setting up alerts when a new document is added, moved or deleted.

The screenshot shows the JDox Settings page. At the top is a blue navigation bar with the JDox logo and links for Home, Checked Out, Inbox, Upload, Help, Settings, and Log off. Below the navigation bar, the page is titled "Settings". On the left, there is a "My Information" section with a "Primary Email" field containing "stucker@jr3online.com" and a "Change Password" link. Below this is the "Folder Settings" section, which includes "Alerts" with three unchecked checkboxes: "A new document / version is added", "A document is moved", and "A document is deleted". Underneath is an "Available" dropdown menu showing a list of folders: "JR3 Education Assoc\Demo\Dwyane", "JR3 Education Assoc\Axtell\Ecabinet", "JR3 Education Assoc\Austin Discovery\Finance", and "JR3 Education Assoc\Contracts\ECABINET". A "Save" button is located at the bottom right of the "My Information" section. On the right side of the page, there is a "Folder Alerts" table with a header row containing "Action", "Document Name", "Ver", "Logged", and "Email Sent?".

Changing Your Password

Go to the Settings Tab

This screenshot is identical to the one above, but with a red callout box highlighting the "Change Password" link in the "My Information" section. The callout box contains the text "Click to Change Password".

Enter your current password.
Enter your new password.
Re-Enter your new password.
Click Change Password to complete.

The screenshot shows the JDox 'Manage Account' page. At the top is a blue navigation bar with the JDox logo and links for Home, Checked Out, Inbox, Upload, Help, Settings, and Log off. Below the navigation bar is the 'Manage Account' section. It starts with 'You're logged in as stucker.' followed by a callout 'Confirms your Login'. The 'Change password' section contains three input fields: 'Current password' (with callout 'Enter your current password'), 'New password' (with callout 'Enter your new password'), and 'Confirm new password' (with callout 'Re-Enter your new password'). A blue 'Change password' button is at the bottom, with a callout 'Click Change Password to complete'. A copyright notice '© 2016 - JDOX' is at the bottom right.

You will receive confirmation your password has been changed.

The screenshot shows the JDox 'Manage Account' page after a password change. The navigation bar is the same. The 'Manage Account' section now displays a green confirmation message: 'Your password has been changed.' with a callout 'Confirmation your password has been changed.'. Below this, it says 'You're logged in as stucker.'. The 'Change password' section is still visible but empty, with a blue 'Change password' button at the bottom.

Alert Settings

You may receive alerts when a new document or version has been added, when a document has been moved or when a document has been deleted.

Check each of the boxes that you want to receive alerts for

Click Save to activate the alerts.

Settings

My Information

Primary Email: [Change Password](#)

Folder Settings

Alerts

- A new document / version is added
- A document is moved
- A document is deleted

Available

Legacy Charter\To Legacy\HR
Legacy Charter\To Legacy\Payroll
Legacy Charter\To Legacy\PEIMS
Legacy Charter\To Legacy\Special Ed

Folder Alerts

Action	Document Name	Ver	Logged	Email Sent?
--------	---------------	-----	--------	-------------

Check the box for each of the alerts you want to receive

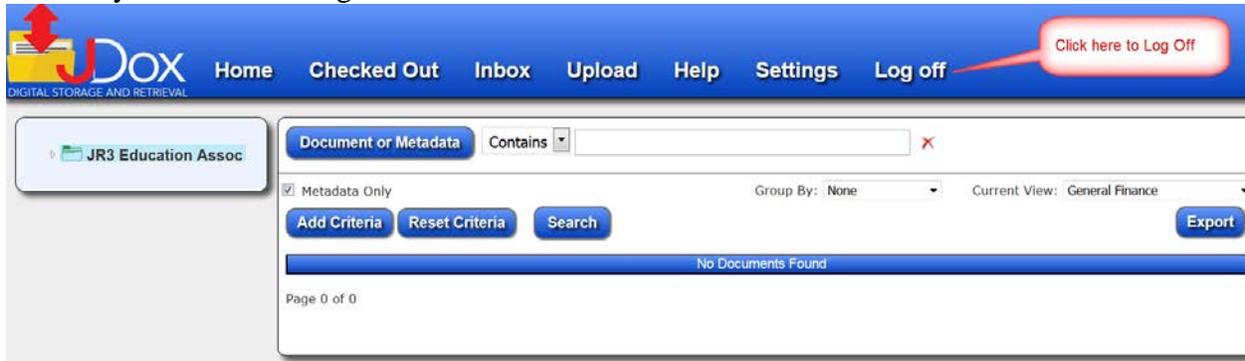
Click Save to activate the alerts

Chapter 9

Log Off

Always Log Off when you are finished with your task to maintain YOUR account's security.

Click anywhere on the Log Off tab



Once you click on the Log Off tab, you are immediately taken to the Log On screen (shown below). This verifies that you are logged out. If you logged off in error, it enables you to quickly log back on and resume working.

Refer to the "How to Access JDox" to get detailed instructions on how to Log In



You will be taken to the JDox Home Screen

Chapter 10

Frequently Asked Questions & Error Codes

Currently there are no Frequently Asked Questions or Error Codes to display.

Please check back frequently for updates.