DOCUMENT STORE

File Archive Replacement

Document Store

- *Replacement for File Archive*

Why?

- Reduce the size of the core application databases
- Documents from various applications stored in one place
  Accessed from within existing applications
- Available module in IPDP, USxS and Inventory
- Enhanced search capabilities of documents and their contents

Request Doc URL: https://docs.google.com/spreadsheets/d/1urlwE-oeg4iNNKXC4ki4lgBaCrOHEy6_VG8_xQhk75c/edit?usp=sharing

Report Bundles Included

- **SSDT Report Bundles**

USAS

SSDT 1099 Multiple Return Type Archive
SSDT 1099 Submission Report Archive
SSDT Calendar Year End Reports
SSDT Fiscal Year End Reports
SSDT Monthly Reports
SSDT Transmitter Summary Report

Inventory: FYE Report Bundle

USPS

SSDT ACH Submission Report Archive
SSDT Benefit Accrual Report Archive
SSDT Calendar Year End Report Archive
SSDT Employer Distributions Submission Report Archive
SSDT Employer Retire Share Submission Report Archive
SSDT Fiscal Year End Report Archive
SSDT Leave Projection Submission Report Archive
SSDT Month End Report Archive
SSDT ODJFS New Hire Submission Report Archive
SSDT ODJFS Submission Report Archive
SSDT Part Time Sick Leave Accrual Report Archive
SSDT Payables Posted Report Archive
SSDT Payroll Payment Detail Archive
SSDT Payroll Posted Report Archive
SSDT Personal Leave to Pay Report Archive
SSDT Personal to Sick Leave Report Archive
SSDT Quarter End Report Archive
SSDT Reset Personal Leave Report Archive
SSDT SERS New Hire Submission Report Archive
SSDT SERS Per Pay Submission Report Archive
SSDT SERS Surcharge Account Report Archive
SSDT STRS Advance Archive
SSDT STRS Merge Archive
SSDT STRS Merge Third Party File Archive
SSDT STRS New Hire Submission Report Archive
SSDT STRS Submission Report Archive
SSDT W2 Submission Report Archive
SSDT W2C Submission Report Archive

- **Custom Report Bundles**

USXS Document Store FAQ'S

- Can we configure Document Store in USXS and then migrate existing File Archive reports later?
  - Yes. You may configure Document Store when ready. Once enabled, any bundles that run from that point forward will be sent to Document Store. Existing reports currently stored in File Archive will remain there until you schedule and complete the DS migration process. Please refer to the 'Document Store' section of the USXS release notes for more information on how to create a DS instance and integrate DS with USXS.
    - **NOTE:** At a later date, once ITCs have confirmed their DS migrations are complete, we plan to remove the File Archive from the USXS menus. This will be well communicated in advance.
- If districts have duplicate reports in file archive, should they be cleaned up before or after migration
  - District choice. If cleaned up before migration, it may help to reduce migration time. Otherwise, duplicates will be migrated and can be cleaned up afterwards.

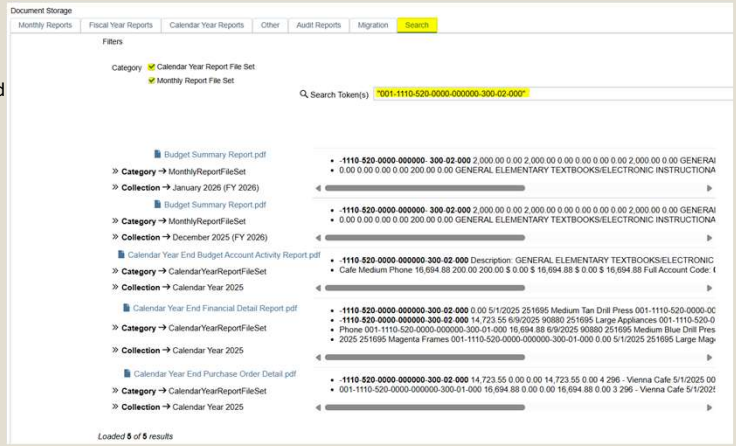
USXS Document Store FAQ'S

- What about saved report bundles from prior (closed) years? Do I import them?
  - Yes, we recommend importing prior year saved report bundles. Steps include:
    - In System>Document Storage, under the appropriate storage area: FY Reports or Audit Reports, click the Create Collection button. The collection will appear in the grid.
    - View the collection and click the upload button that appears just above the grid. From here a small window will open and will allow you to upload your previously saved files.
      - NOTE: If the bundle is stored as a ZIP file, it will be displayed as a ZIP file when imported. If you want all PDF files displayed in DS, please open (extract) the zip file first and then copy and paste the PDFs (block copy/paste) into Inventory DS.
- When migrating reports, will the timestamp be the date of the migration or the original date of the reports.
  - Migrated reports retain their original timestamp. The migration process does not change the original report date or time.
- If a district has a custom report bundle scheduled to go to file archive, will they need to reschedule the job to go to DS instead?
  - No, the reports will start going to DS when the module is installed. There is no need to reschedule report bundle jobs.
- Will USPS W2s and pay slips still automatically flow to ESS after configuring DS?
  - Yes. There will be no changes to this process. W-2s and pay slips will continue to flow to ESS and function exactly as they did prior configuring DS.

USXS Document Store FAQ'S

- Does DS use the same roles (permissions) as File Archive?
  - Yes
- How can I view the bundle reports?
  - With INV_Standard (and elevated roles), when the fiscal year report bundle is generated, the associated reports will be available in the **System>Document Storage** grid in Inventory for users to view or download.

- There is no DS migration involved with Inventory correct?
  - Correct, there are no archived reports in Inventory to migrate to DS. Once DS has been integrated with Inventory, the fiscal year report bundle generated at period close will be sent to Document Store (and no longer emailed to the addresses listed in the Inventory Configuration).

Elastic Search

- Document Storage> **Search**
- Filter on Category (aka DS tabs)
- Everything in PDF is tokenized so it can all be searched
- **Search Results**
  - Displays total hits
  - Shows first 5 matching PDFs (load more)
  - Category display (File Archive equivalent)
  - Collection grouping (Per Pay/Month/Year)
- **Search Tips**
  - search value inside quotes if more than one word or value
  - search by "account-code" and amount can be separated with space or comma
  - search will do **OR** for multiple values
  - * to do a wildcard search
  - + to do AND search
  - - to exclude from search