

## Document Store









You may have heard some buzz that State Software is implementing a new document management and archival system. If so, you heard correctly. Document Storage (also referred to as Document Store or DS) is the replacement for File Archive within the USXS applications (USAS, USPS, Inventory, and ESS). It serves as a separate, centralized storage solution designed to securely store, manage, and retrieve district documents across the various State Software applications.

Instead of stored documents taking up space within Utilities -> File Archive in the USXS applications, report bundles and other stored documents will now be housed in a centralized Document Storage system. This option allows for quicker backup time for USXS instances, and it also has a couple of bonus features as well). Users will continue to access and retrieve their stored documents directly within the USXS applications, however it will be through the new **Utilities -> Document Storage** option. This option acts as a convenient portal or “placeholder”, that mimics the File Archive layout. When viewing or downloading reports from here, the system is actually retrieving the documents from the centralized storage area. This keeps the USXS applications more efficient while still allowing users to view, download, and search their report bundles and documents seamlessly in USAS and USPS. The existing reports stored in Utilities -> File Archive will need to be migrated to the centralized Document Storage system (with assistance from HCC). Once fully migrated, the reports will appear in Utilities -> Document Storage and will be removed from Utilities> File Archive. Eventually, the File Archive option will go away, and just the Document Storage option will remain.

**Inventory** – In Inventory, Document Store is located under “**System**”

**Roles:** **INV\_STANDARD** and **INV\_GROUP\_MANAGER** can view, edit, upload, download, and delete in Document Store.

For the Inventory application, Fiscal Year report bundles will *no longer be emailed* when the period closes. Instead, the bundled reports will be housed in the centralized Document Storage system, and the user will be able to access their reports directly in Inventory via the new **System> Document Storage** option. Say goodbye to emailed bundles, and say hello to quick, direct access to your Inventory reports!


Document Storage		
<a href="#">FY Reports</a> <a href="#">Audit Reports</a>		
<a href="#">Create Collection</a>		
	Description ▾	Fiscal Year ▾
   	FY 2024 Reports	2024
   	FY 2025 Reports	2025

**USAS/USPS** - In USAS/USPS, Document Store is located under "**Utilities**" and will be right above "**File Archive**" and "**Encumbrance Adjustment**".

Once the Document Store conversion is generated, all reports should show under "Document Store", rather than "File Archive".

For **view and download access** to Document Store, a user needs at least **STANDARD\_READONLY\_USER + MODULE\_FILE\_PAYROLLARCHIVE\_VIEW** permissions.

- **MODULE\_FILE\_PAYROLLARCHIVE\_VIEW (USPS) or USAS\_FILEARCHIVE (USAS)** role will provide the user view, edit, and download access.
- **STANDARD\_USER** role has view, edit, search, and download access.
- **USAS\_MANAGER & GROUP\_MANAGER** roles have view, edit, upload, download and search access.
- **ADMINISTRATORS** role has view, edit, upload, download, search and delete access.



Document Storage						
Payroll Archive		Pay Form Archive		W2 Archive		Other
Audit Reports		Migration		Search		
+ Create Collection						
<input type="checkbox"/>				Description	Year	Type
<input type="checkbox"/>				2025 - Monthly Reports	2025	Monthly Reports
<input type="checkbox"/>				2025 - Payee Payment Detail	2025	Payee Payment Detail
<input type="checkbox"/>				2025 - Per Pay Reports	2025	Per Pay Reports
<input type="checkbox"/>				2025 - Calendar Year Reports	2025	Calendar Year Reports

**In order for Document Store to work, it must be integrated and configured with your USAS, USPS and Inventory applications.** HCC has been diligently working on installing and enabling Document Store for their districts as well as migrating existing USXS File Archive reports to Document Storage.

*If you have questions regarding the timetable for your district's Document Storage installation and migration, please contact HCC. HCC will notify the Treasurer of each district when the migration will occur and coordinate timing which suits the district's needs. Migrations can take between 1 hour and several hours. Current plans are to migrate at the beginning or end of the working day.*

## New Feature: Search

With the appropriate role in USAS and USPS, Document Storage includes a powerful Search feature that uses *Elasticsearch* to index the contents of PDF files, allowing you to search within the actual text of those documents.

To perform a search:

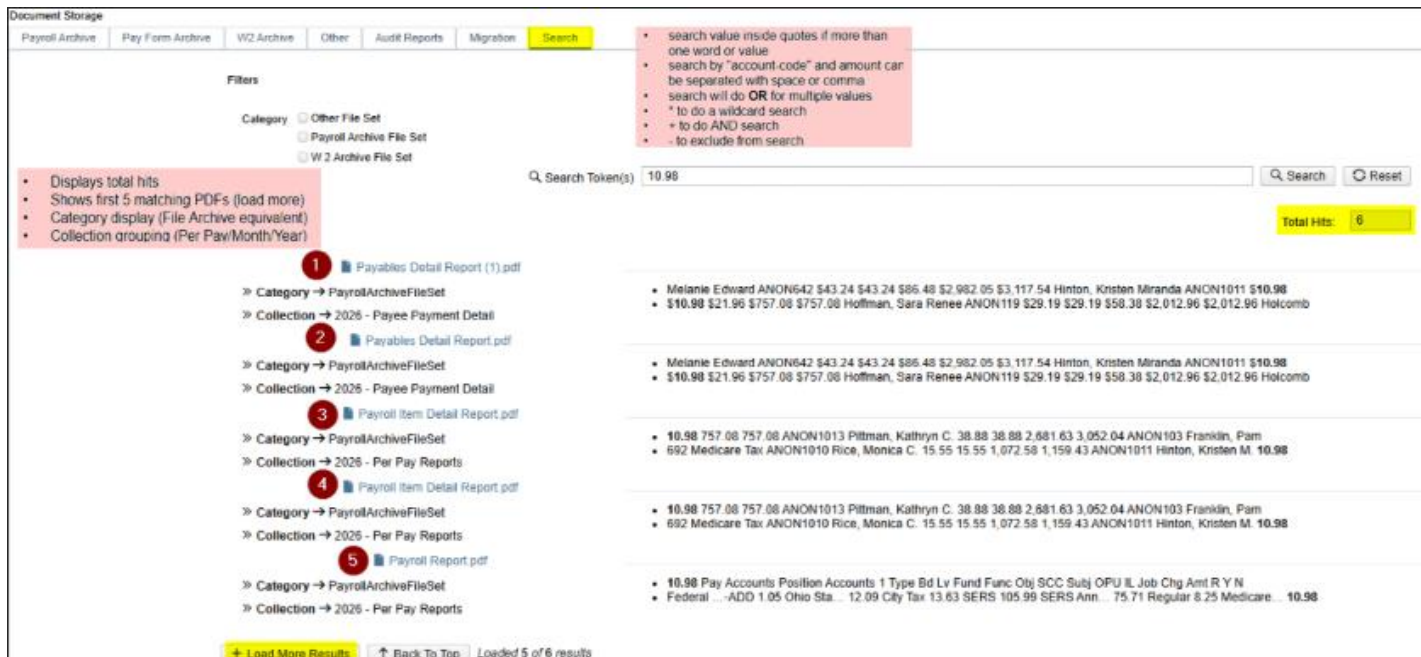
1. Select one, or more, Categories to narrow your search results (optional). If no Category is selected, all Categories will be included in the search by default.
2. Enter your search terms in the "Search Token(s)" field.
3. Click Search to execute the query.

Search Tips:

- search value inside quotes if more than one word or value
- search by "account-code" and amount can separate with space or comma
- search will do **OR** for multiple values
- Use a \* to do a wildcard search
- Use a + to do **AND** search
- Use a - to exclude from search

Search results display:

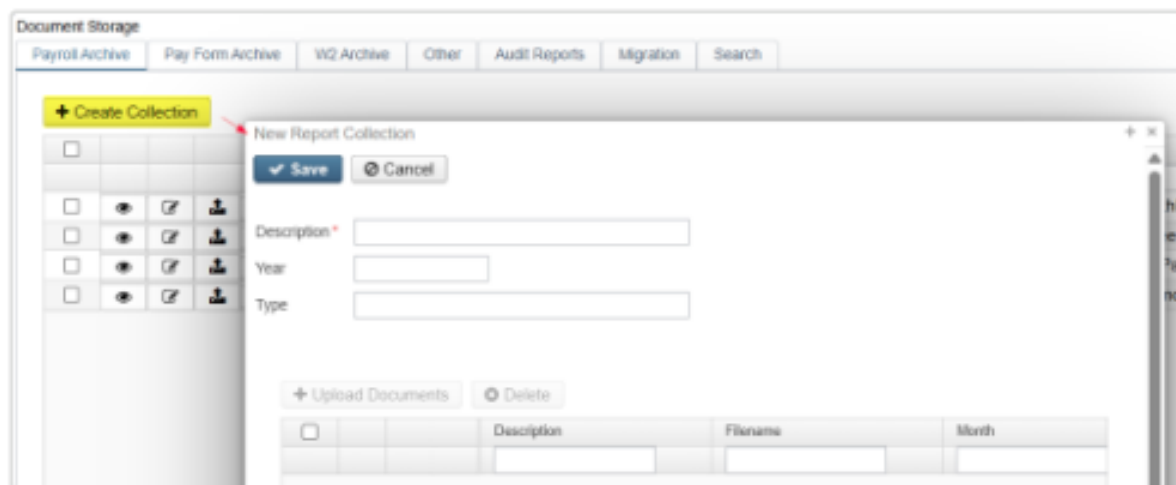
- Total hits = total number of reports found.
- The report name, which can be downloaded.
- Associated category and collection
- The specific row(s) where the match occurred. This makes it easy to identify not only which report contains the information, but exactly where it appears within the document.



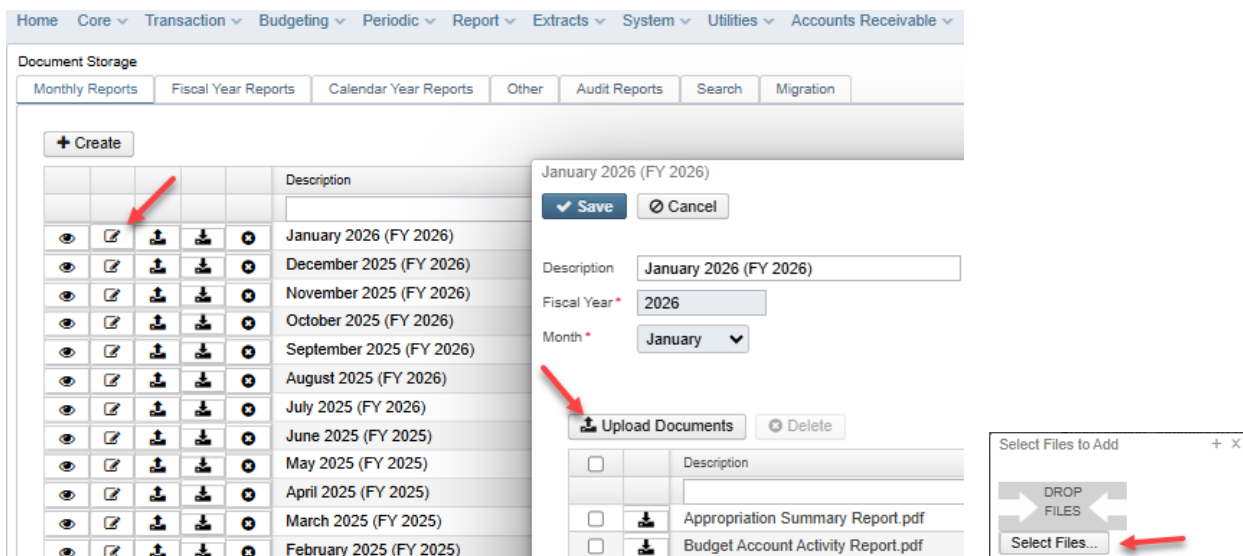
The screenshot displays the Document Storage search interface. At the top, there are navigation tabs: Payroll Archive, Pay Form Archive, W2 Archive, Other, Audit Reports, Migration, and Search. Below the tabs is a Filters section with radio buttons for Category: Other File Set, Payroll Archive File Set, and W2 Archive File Set. A search bar labeled "Search Token(s)" contains the text "10.98". To the right of the search bar is a "Total Hits: 6" indicator. Below the search bar, there are five search results, each with a red circle containing a number (1-5) next to the report name. The results are grouped by category and collection. A red box on the right side of the interface contains 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", and "- to exclude from search". A red box on the left side of the interface contains search result display tips: "Displays total hits", "Shows first 5 matching PDFs (load more)", "Category display (File Archive equivalent)", and "Collection grouping (Per Pay/Month/Year)". At the bottom of the interface, there are buttons for "Load More Results" and "Back To Top", and a status indicator "Loaded 5 of 6 results".

## New Features: Create Collection & Upload Documents

Click “+ Create Collection” to create a new collection and upload any documents into it. This would be for creating a collection of already created reports “on the fly”.



For adding an *individual report* to an *already existing* Monthly Archive File, you would “Edit” the line item of the Monthly Archive, then select **Upload Documents** to add the document to the Monthly Archive.



## **Just to recap:**

### **USAS and USPS**

Once HCC has Document Storage integrated with USAS and USPS and the module has been enabled in the applications:

- Existing File Archive reports remain accessible in Utilities -> File Archive until your HCC migrates them to Utilities -> Document Storage. Once fully migrated, they will appear under Utilities -> Document Storage.
- All newly generated report bundles will be sent to Utilities -> Document Storage
- Reports will no longer be added to Utilities -> File Archive
- Document Storage has the same user functionality as File Archive, allowing you to view the list of reports in each collection and download them

More information can be found in the [USAS](#) and [USPS](#) Document Storage chapters of the user manuals.

### **Inventory**

Once HCC has Document Storage set up and integrated with your Inventory application:

- Newly generated report bundles will be sent to System -> Document Storage
- Report bundles will no longer be emailed to the Fiscal Year Report Bundle Email Addresses listed under Core -> Configuration
- Document Storage in Inventory has many of the same features and user functionality that is available in USXS Document Storage

Previously saved report bundles may be uploaded into Document Storage (refer to the Document Store chapter in the Inventory User manual for step-by-step instructions).