Kuali Build - Document List Tools & Customization

Document List Toolbar

← Program Change Request (DEMO) :							Documents	Form	Workflow	Publish
Q Jane	× G0 11 Sort (1) 👁 Columns 🕷	Views				Export All	🖞 Share	🗘 Data Setting	gs New
Number ↓ Submitted At	Submitter	Student ID - Email	Student ID - Advisor	Student ID - Advisor - ID	Student ID - Advisor - Display Name	Student ID - Advisor - School ID	Student ID - Advisor - Email Act			Actions

Search

Search for specific documents or specific fields within documents based on keywords. When searches are enclosed in quotes, only exact matches are returned, potentially considering case sensitivity. Please note, that text fields with over 100 characters or those populated through integration are not indexed and will not appear in the search results.

Sort

Sorts Document List according to the criteria, or in ascending or descending order. Selecting a sort option will clear any previous selection.

Export Current View or All

Exports data into a CSV file. 'Current View' will only download the columns shown on the dashboard as currently viewed. 'All' will download all documents (as permissioned) with all fields and metadata.

Adding Columns

The Document List already has default columns, but you can change these **columns** and set up **views** and filters that you can come back to at a later time.

Columns

- To add a column, go to your app's Document List.
- Click on the Column button. A pick list of the data fields from the form will appear.
 - Fields that are labeled Submission Data come from questions asked on the form.
 - Fields labeled Meta Data contain information that is tracked in the form's Meta Data when the form is submitted.
- To enable a field, click on the eyeball icon To disable a field click on the eyeball icon

again, so that it is crossed out

• To arrange the order your columns will appear in on your Document List, click on the handle to the left of the column's name. Drag and drop the column to the desired location.

Views

Save selected filters and columns in a report to easily view saved views. The saved views feature allows users to store up to 100 customized views for quick access.