FinalForms Playbook

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Student Documents

Uploading documents to Student (such as Physician Physical forms or permission slips) can streamline processes, reduce burden, and ensure documents are accessible and organized.

Quick Reference:

- <u>Uploading Documents</u>
- Editing Uploaded Documents
- Managing Documents (Additional Options)

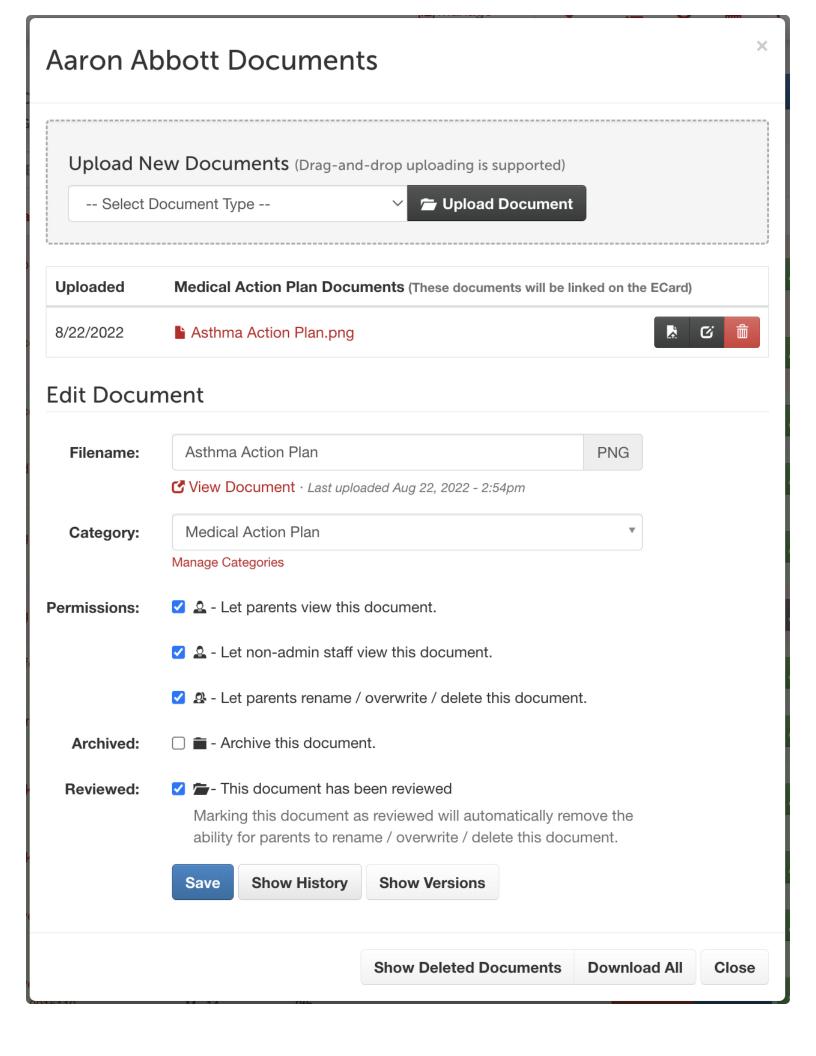
**Managing of Student Documents is available to Staff with Administrative Privileges. **

Uploading Documents

- 1. Click **Manage > Students**.
- 2. Click the icon in the student's row, under **Actions**.
- 3. Select the "Document Type" from the dropdown and click Document to navigate to file.
 - Alternatively, you can drag-and-drop the file if you already have it available.
- 4. Once completed, you will presented with the message:
 - "FirstName LastName's document "filename.filetype" was successfully uploaded."
- 5. Click Close to exit the window.

Editing Uploaded Documents

- 1. Click **Manage > Students**.
- 2. Click the icon in the student's row, under **Actions**.
- 3. Click the 🖸 Edit button for any given document.
- 4. Modify the *Edit Document* fields and settings, as necessary.
- 5. Click Save when finished.



Document Options

- **Filename:** Revise the name of an uploaded file (helpful when someone uploads an image from a mobile device).
- Category: Select from our standardized categories or click Manage Categories to add additional selections.
- **Permissions**: access-based restrictions that can be set per-document.
 - Let Parents view a document.
 - Let non-admin Staff view a document (Coaches, Teachers).
 - Let Parents rename/overwrite/delete a document.

IMPORTANT: Unless an Admin restricts a documents access, a student's document can be viewed by the student's parents and the student's coaches.

- Archive: Archived documents, by default, don't appear in the default listview of Documents.
 - At the start of a school year, all documents over a year old are marked archived.
 - Click the Show Archived Documents (1) link to access archived documents.
- **Reviewed:** Marking a document as *reviewed* will automatically remove the ability for parents to rename/overwrite/delete the document.
- Show History and Show Versions buttons:

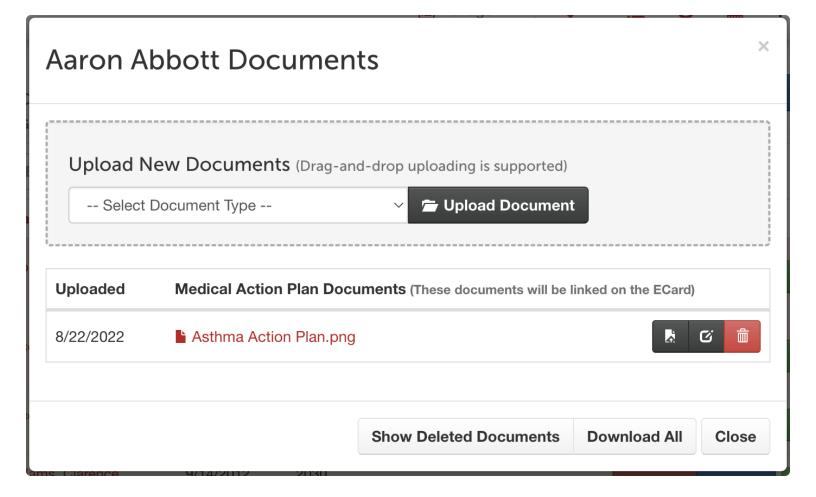
 Show Editor/Date and Action(s) taken and File Versions overwritten.

Managing Documents (Additional Options)

- 1. Click **Manage > Students**.
- 2. Click the icon in the student's row, under **Actions**. Once opened, you can:
 - Click to replace/overwrite the latest file version.
 - Click im to delete the document.

IMPORTANT: Documents are not 100% deleted, they are instead retained in Show Deleted Documents

o Click Download All to receive a .ZIP of all current, non-deleted Documents.



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