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PowerUPs

Enrollment: Document Upload

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Agenda

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2	Considerations
3	Parent vs. Admin Use
4	Element Properties
5	How to
6	Delivery Set-Up
7	Resources
8	Q&A
9	Upcoming Events & Webinars

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What is a Document Upload Field?

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What is a Document Upload Field?

"Document Upload feature gives both your parent users and admin users, the ability to upload documents to your student's submission records.

Definition

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Considerations

Considerations

Only certain file types can be uploaded to the system	• .doc, .docx, .pdf, .txt, .rtf, .xls, .xlsx, .bmp, .gif, .jpg, .jpeg, and .png.
File Size Limit	• Max 30MB
Parents	• Provide list of documents needed • Add accepted types to note text • Can not upload once form is submitted

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Parent Vs. Admin Use

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Parents Vs. Admin Use

Parent Use

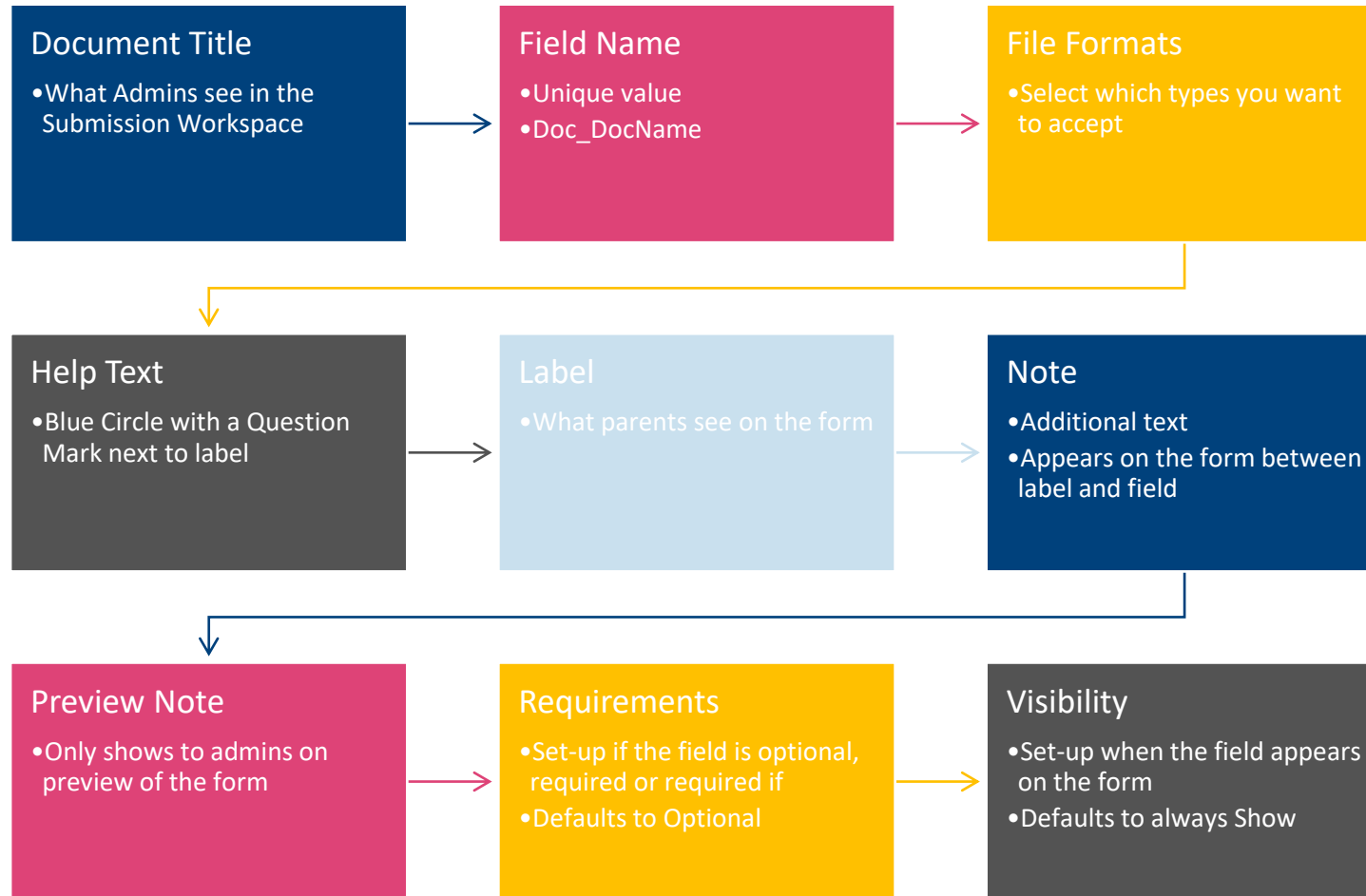- Upload documents while filling out the student's form

Admin Use

- Ability to upload/verify/delete documents within the record in the submission workspace

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Document Upload Field Properties

Document Upload Properties

Document Title
- What Admins see in the Submission Workspace

Field Name
- Unique value
- Doc_DocName

File Formats
- Select which types you want to accept

Help Text
- Blue Circle with a Question Mark next to label

Label
- What parents see on the form

Note
- Additional text
- Appears on the form between label and field

Preview Note
- Only shows to admins on preview of the form

Requirements
- Set-up if the field is optional, required or required if
- Defaults to Optional

Visibility
- Set-up when the field appears on the form
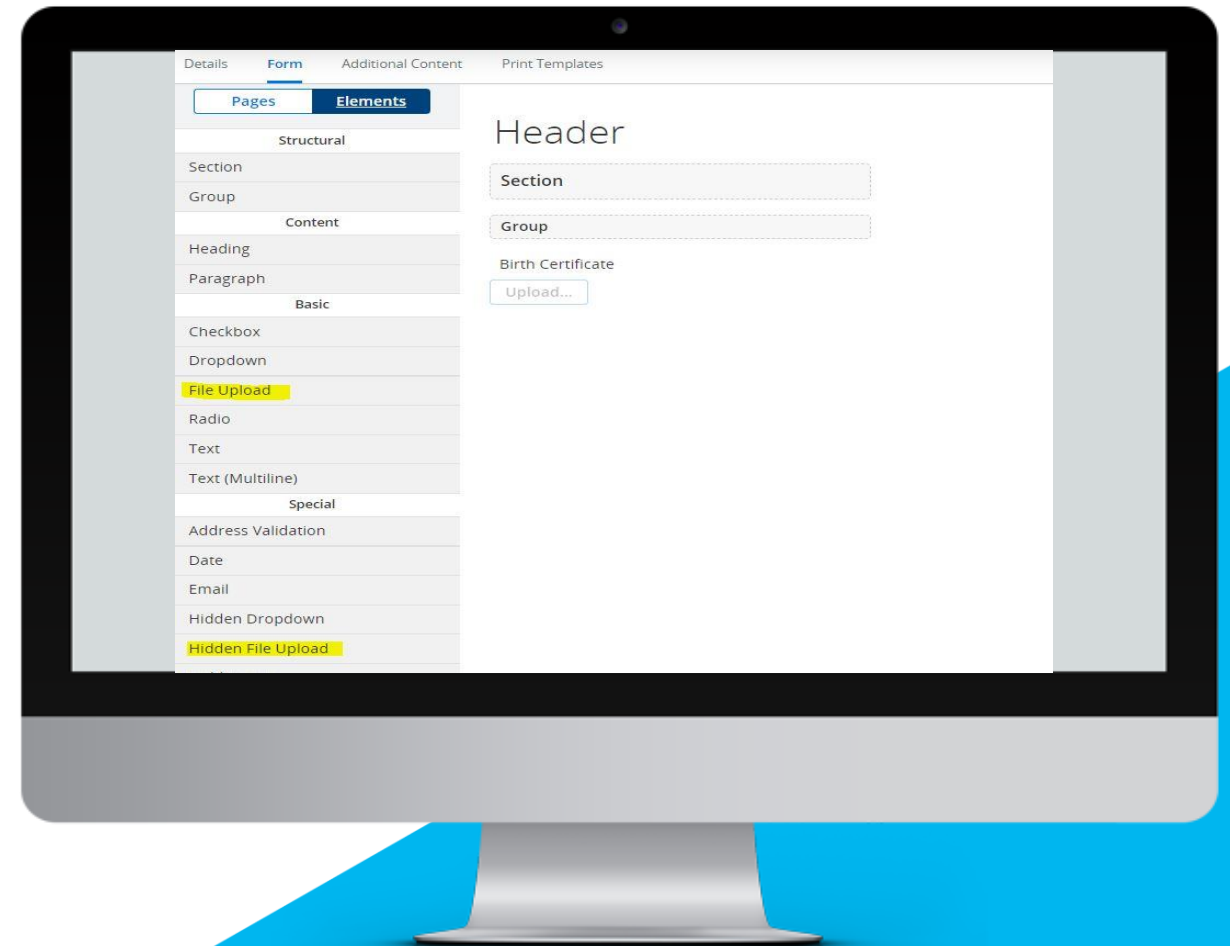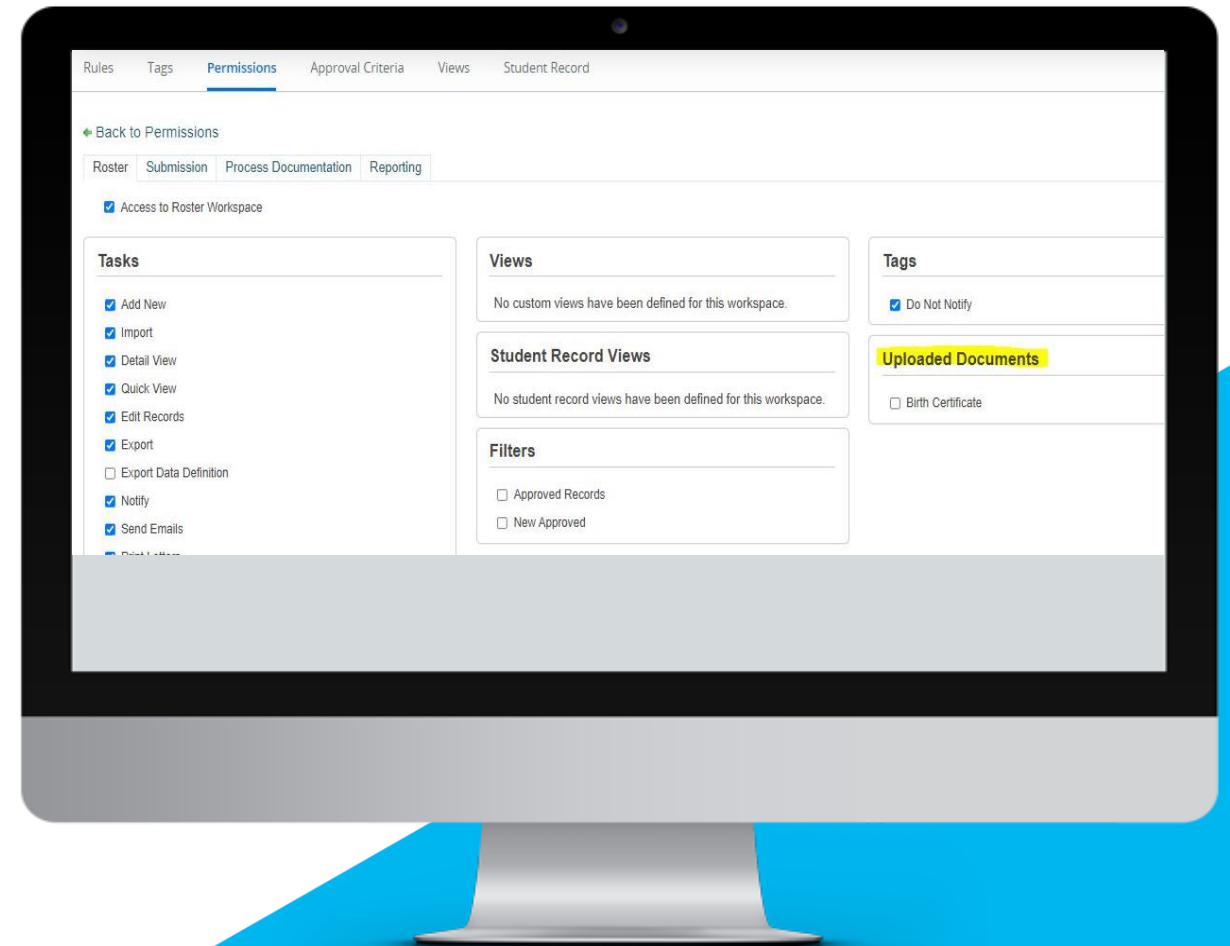- Defaults to always Show

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How To

Adding a File Upload Field

Configuration > Form Builder > Choose Form > Elements > Drag Drop/Click Either File Upload or Hidden File Upload
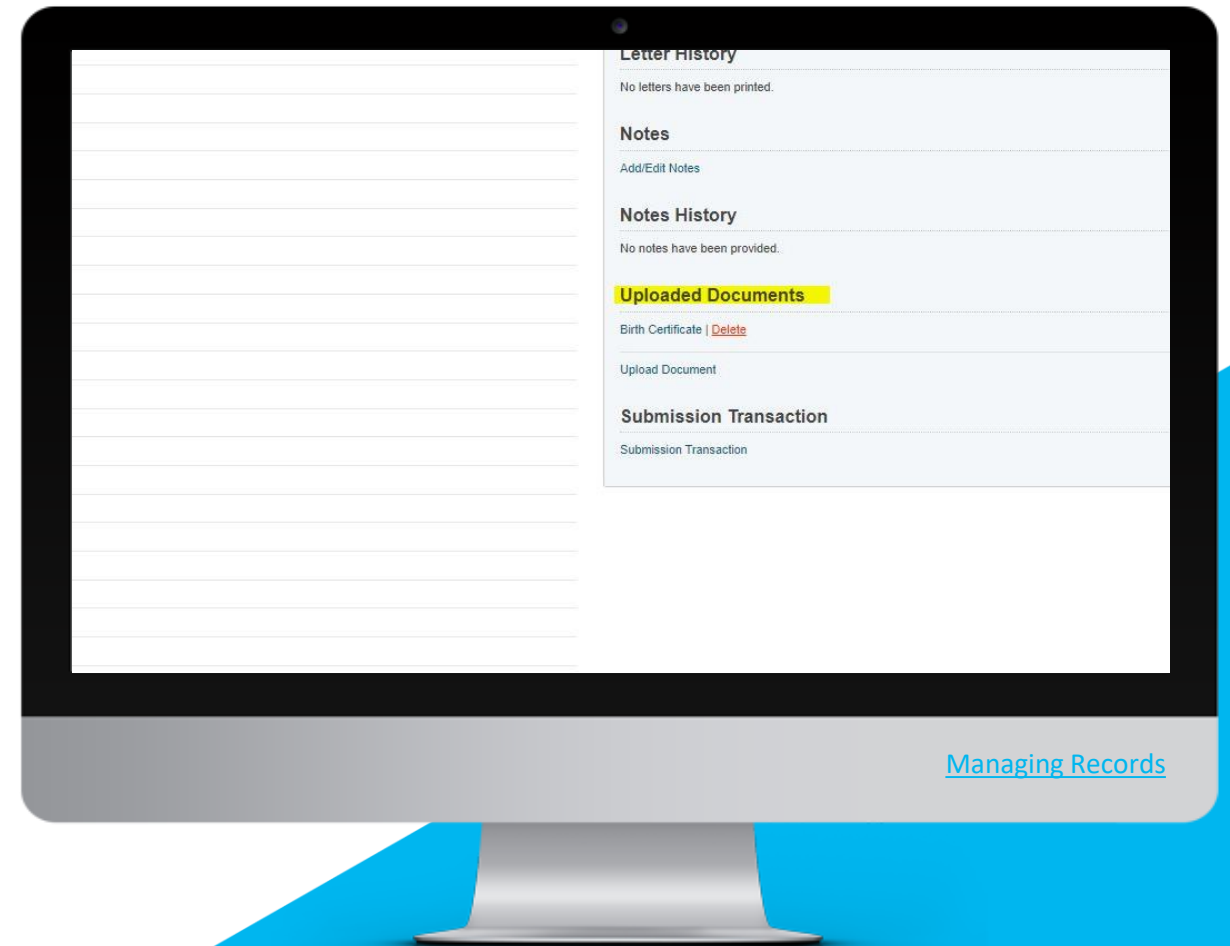

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Giving Access to Document Fields

Configuration > General > Choose Form > Permissions > Click Edit on Profile > Check off document name

Managing Documents

Student Data > Choose Form >
Submission Workspace > Find Student >
Click Paper & Pencil Icon > Locate Upload
Documents Section on Right Menu

Letter History

No letters have been printed.

Notes

Add/Edit Notes

Notes History

No notes have been provided.

Uploaded Documents

Birth Certificate | Delete

Upload Document

Submission Transaction

Submission Transaction

Managing Records

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Creating a View for Documents

Configuration > General > Choose Form > Student Record > Choose Workspace > Create View

Student Record Views
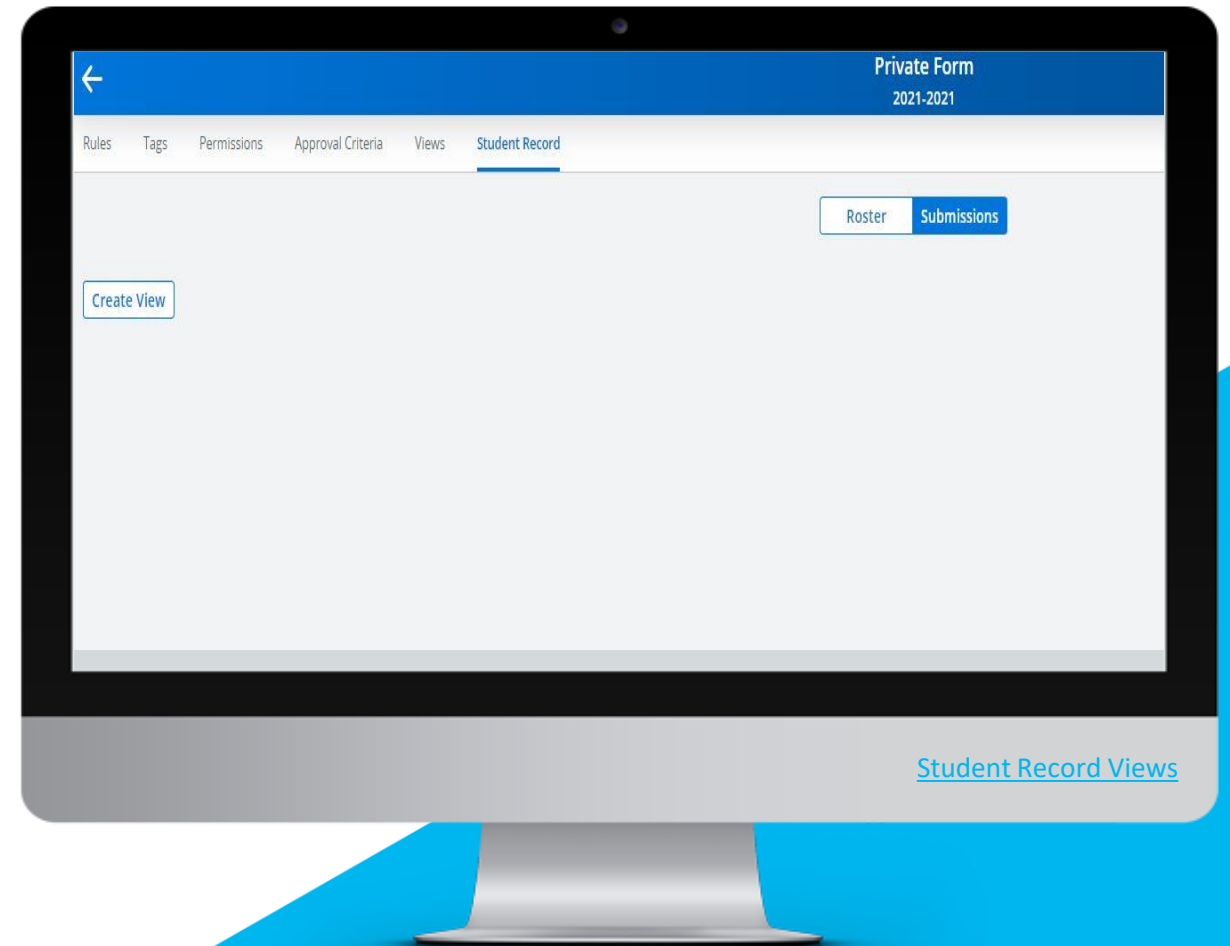
Document Delivery

Documents will auto deliver when records are delivered unless there is an error on delivery

Resources

Help Guide & Community

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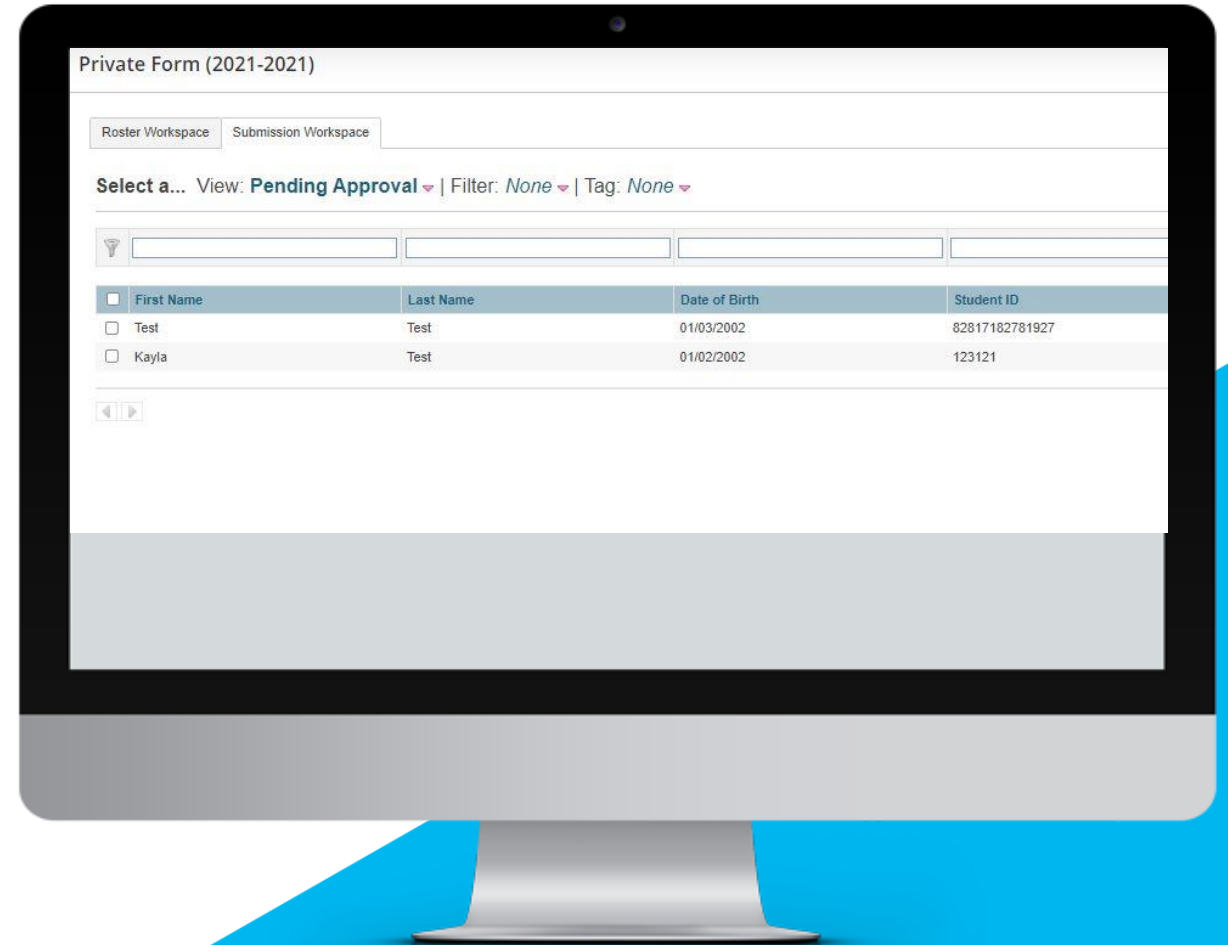
Resources

Help Guide	Community
Element Properties	Document Upload Fields
Review and Update a Record	Workspace Features and Tools - Video
Document Matching	Features Index
	Q&A: Year-Round Update
	eSchoolPlus SIS Document Integration
	How to - Setup a Document Server in a Server Array
	Document Attachment Server - Unable to Connect

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? Questions

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Upcoming Events & Webinars

Upcoming Events

Enrollment Admin Office Hours
Wednesdays @ 11am ET / 8am PT

https://help.powerschool.com/t5/PowerSchool-Enrollment/Join-us-for-Enrollment-Office-Hours/ta-p/132352 *Recordings found here

Enrollment Basics Webinar Series
2nd and 3rd Monday of the Month @ 11am ET / 8am PT

https://help.powerschool.com/t5/Enrollment-Administrator-Forum/Register-Now-for-Enrollment-Signature-Basics-Webinar-Series/m-p/304392#M766

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Upcoming Webinars

https://help.powerschool.com/t5/Enrollment-Admin-Forum/Enrollment-Webinar-Series-2022/m-p/268719#M694

Permissions and Profiles - This session will give you a crash course into managing your districts permissions & profiles. We will cover add/adjusting profiles as well as adding new staff to forms.
April 7

Enrollment Resources - Want to learn what resources you have available to you? This is the session for you we will walk you through resources like community, help guide and more.
April 14

Parent Experience/Troubleshooting - Session will consist of a walkthrough of a form from the parent's perspective. It will also cover troubleshooting techniques
May 12

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