



Good Morning, Aeries!

Student Documents



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Good Morning, Aeries!

- *Session will last 30 – 45 minutes*
- *Show and Tell*
- *Casual*
- *Time for Q & A*
- *PPT & Recording Posted*



NEED TO KNOW

- Purpose of Student Documents
- Where to find Student Documents
- Types of files that can be stored
- How to Add, View, and Edit Documents
- Student Document List



NICE TO KNOW

- Tables and Fields
- Security Settings for Student Documents
- Code Table Setup
- INV Table use



Purpose & Info

- **The Student Documents page is used to upload and manage documents related to a student**
- **Ability to store student documents and relate them to tables**
- **Must have permissions in the Doc table**
- **Ability to relate a document to a table**
- **Users can only view documents related to a security area they have access to.**
- **Documents can be locked so they cannot be changed or deleted**



Where to find Student Documents



Student Data | Other | Student Documents



Student Documents

←

Allan (AJ) Abbott ▾

→

General

Contact

Add'l Info

Flags 5

Programs 6

User Codes ^

Student ID99400001

State Student ID9940000001

Status TagActive

Student Number1

Grade12

Age18

GenderMale

Birthdate11/11/2005

CounselorDurbin, S

Language FluencyEnglish Learner

CorrLng / RptgLngEnglish / Spanish

Interdistrict Status

Documents

☐ Only show Current Grade

Print

Add

	Date	Grade	View	Document Name	Category	SubCategory	Related to	Locked?	Uploaded by
	11/10/2023	12		99400001-Doc01	05- Miscellaneous	-		No	



Student Documents– File Types

- **Word**
- **Text Files (TXT)**
- **EXCEL Files**
- **Image Files (JPEG, GIF, PNG, etc)**
- **PDF**

Files must be able to be accessed from an accessible drive on the user's device.






Adding a Student Document



Student Documents

← Allan (AJ) Abbott →

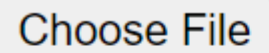
General Contact Add'l Info Flags 5 Programs 6 User Codes ^

 Student ID 99400001 Grade 12 Counselor Durbin, S
State Student ID 9940000001 Age 18 Language Fluency English Learner
Status Tag Active Gender Male CorrLng / RptgLng English / Spanish
Student Number 1 Birthdate 11/11/2005 Interdistrict Status



Documents ☐ Only show Current Grade  Print  Add

	Date	Grade	View	Document Name	Category	SubCategory	Related to	Locked?	Uploaded by
	11/10/2023	12		99400001-Doc01	05- Miscellaneous	-		No	

1. Navigate to Student Documents
2. Select the appropriate student
3. *Select the Add button*
4. Select Choose File
5. Locate the file to be added and then select Upload
6. Fill in the appropriate fields
7. Save the record

 No file chosen

** Maximum File Size is 100000 KB.



Fields of Student Documents

DOC Table

- DT - Date of record
- GR - Student Grade Level*
- NM - Document Name
- XT - Document Extension
- CT - Category
- SCT - Subcategory
- TY - Related to what table
- LK - Lock
- UN – Uploaded by (user name)

* - Can limit view to current grade level



Editing a Student Document

Student Documents

←

Allan (AJ) Abbott ▾

→

General


Contact

Add'l Info

Flags 5

Programs 6

User Codes ^



Student ID99400001

State Student ID9940000001

Status TagActive

Student Number1

Grade12

Age18

GenderMale

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Add

	Date	Grade	View	Document Name	Category	SubCategory	Related to	Locked?	Uploaded by
	11/10/2023	12		99400001-Doc01	05- Miscellaneous	-		No	




To modify the document

1. Select the edit icon (pencil)
2. Make Changes
3. Click Save or click the cancel icon (back arrow)


To delete the document

1. Select the edit icon (pencil)
2. Select the trashcan
3. Confirm the delete

Documents



Date02/15/2024



Grade12

▼




Viewing a Student Document

Student Documents

← Allan (AJ) Abbott ▾ →



General Contact Add'l Info Flags 5 Programs 6 User Codes ^



Student ID	994000001	Grade	12	Counselor	Durbin, S
State Student ID	99400000001	Age	18	Language Fluency	English Learner
Status Tag	Active	Gender	Male	CorrLng / RptgLng	English / Spanish
Student Number	1	Birthdate	11/11/2005	Interdistrict Status	


Documents


☐ Only show Current Grade

	Date	Grade	View	Document Name	Category	SubCategory	Related to	Locked?	Uploaded by
	11/10/2023	12		99400001-Doc01	05- Miscellaneous	-		No	

To View the document

1. Select the document icon
2. The document will display
3. In some cases, it goes to a download
4. Select the download icon at the top of the page



 99400001-Doc01 (12).docx
11.8 KB • Done

admin ▾



Student Documents and INV

- **DOC related to INV**

When choosing INV as the related table for a student document, the document will show in both Doc and INV.

- **INV**

Documents added in DOC and related to INV will show in the Documents button of INV..

- **DOC**

Will display with all other documents related to other tables.

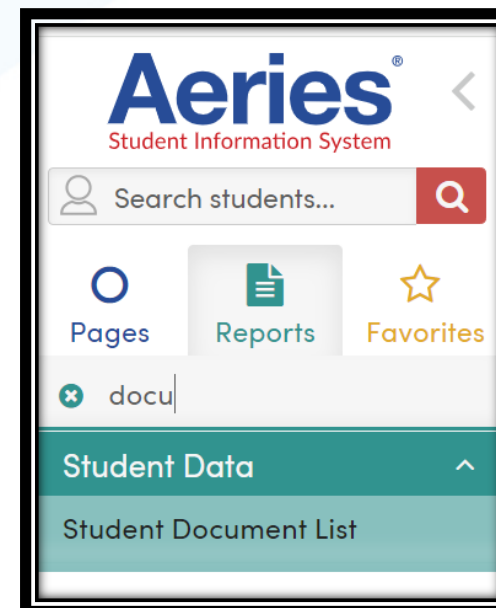
- **Managing INV related Documents**

INV related documents may be managed from within INV as well as DOC. Documents added or updated in one will update the other..



Student Document List

- The Student Document List is a Report that identifies student document information
- Select the Print button from within Student Documents for a single student
- Run from View All Reports for multiple students
 - Select the report
 - Select Options
 - Select students
 - Run the report



Print Student Document List Report Options

Report Format:

PDF

Report Delivery:

None

A KEEP/SKIP query is recommended to run this report against large schools.

☒

Print each student on a separate page

☒

Skip students without Documents

☒

Only Print Documents for the Student's Current Grade

Select Students to be used if not all.

☒

Show all Students (includes inactive students)

Filter by Student ID, Name, or Number...

StuID	Name	Gender	Gr
2	--		9
99400001	Abbott, Allan	M	10
99400002	Abdelnour, Alice	F	9
99400003	Abdo, Alice	F	9
99400004	Abdo, Arnold	M	10
99400005	Abea, Ayrianna	F	10
99400006	Abejon, Tanya	F	10

Total: 0

Clear All



Security – Permissions - DOC

- **Read Permissions - Ability to View**
- **Read and Insert = Ability to Add**
- **Read and Update = Ability to Modify**
- **Delete = permissions to Delete**
- **Must also have rights to the related table**



Code Table

- **Add Additional codes to Category and Subcategory fields**
- **Update the Code Table**
- **Select the DOC table**
- **Category – DOC.CT**
- **Subcategory = DOC.SCT**





THANK YOU!

*If you need full Aeries training, send email to
training@aeries.com*



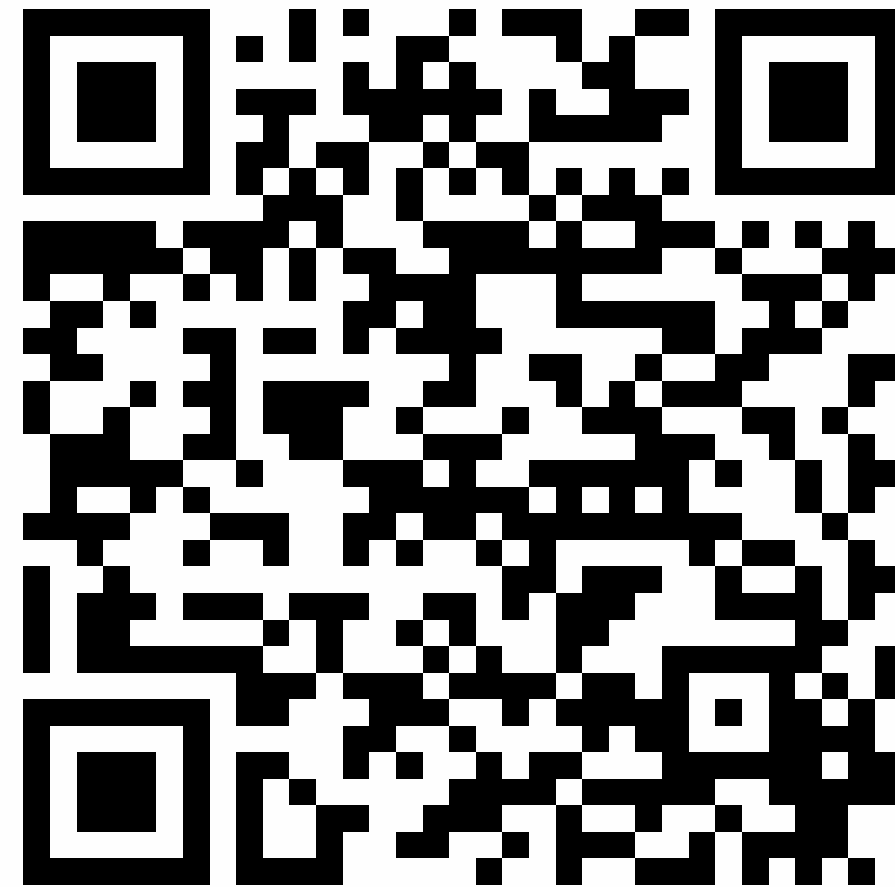
WHERE TO GO

Link to documentation:
[Student Documents](#)





Feedback:



<https://survey.alchemer.com/s3/7443595/Aeries-Training-Survey>