

Pupil Docs & Comms Store

For the Integris administrator

The **Docs & Comms** section of the **pupil record** allows users to store imported and/or Communicate generated mailmerged documents for individual students or Communicate generated emails.

To access the Docs & Comms screen, users need to be assigned one or more of the following roles via **Modules > System Management > User Management**

| Role | Description |
|--------------------|--|
| StudDocStoreEdit | edit document properties (e.g. filename) |
| StudDocStoreDelete | delete documents from the document store |
| StudDocStoreView | view/download stored documents |
| StudDocStoreStore | upload/store documents |

Think carefully about the roles you are assigning – the **Docstore_View** role will only allow the user to see the documents and download them if required and view emails that have been sent.

***What files can be uploaded to the Docs & Comms section?

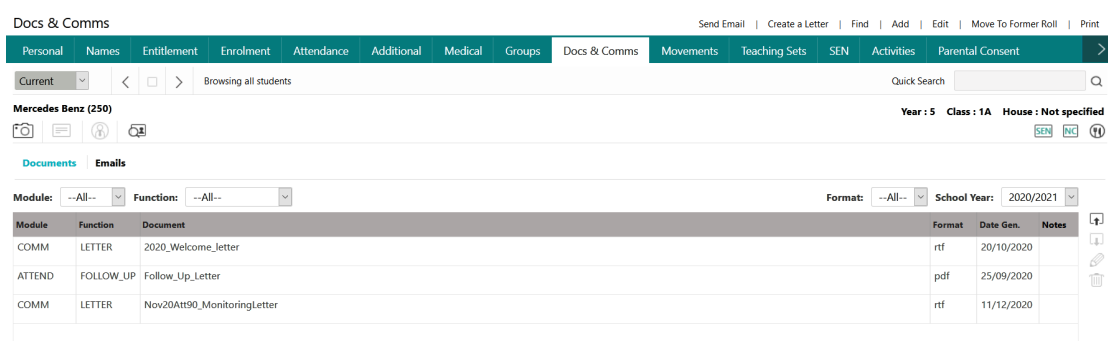
Currently you can upload documents which are .jpg , .doc , .docx , xls, csv .rtf and .pdf types. The maximum size for each file is 10Mb.

Viewing Documents in the Docs & Comms screen

Go to **General > Student Details** > click on the **Docs & Comms** tab for any pupil record

The default view is set to display **Documents**

- Each document is listed on the pupil's Document screen with the '**Function**' listed which relates to how the document originated
- Documents are listed by default for the current academic year. *Select year in **School Year** drop-down menu to view other years.*
- The documents list can be filtered by Module, Function and Document type.
- Any document in the pupil's list can be downloaded by clicking on the **Download File** link - *note, if the document is then edited and saved, it needs to be re-uploaded to the Document store for the pupil*



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Use the **Module** list of options to filter out the 'category' of document (assigned to the document when created and saved or uploaded to the Docs & Comms screen) i.e. COMM relates to a mailmerged document generated through Communicate

The **Function** list of options represents the method by which the document originated.

Viewing Emails in the Docs & Comms screen

Go to **General > Student Details >** click on the **Docs & Comms** tab for any pupil record > then click **Emails**

Docs & Comms

Send Email | Create a Letter | Find | Add | Edit | Move To Former Roll | Print

Personal | Names | Entitlement | Enrolment | Attendance | Additional | Medical | Groups | Docs & Comms | Movements | Teaching Sets | SEN | Activities | Parental Consent

Current | < | > | Browsing all students | Quick Search |

Mo Ali (296) | Year : 5 | Class : 4A | House : Not specified | SEN |

Documents | **Emails** | Academic Year | 2020 - 2021

| Subject line | Student | Date sent |
|--|---------|-----------------------|
| test 2 Dear Miss Streep & Mr Connery | Mo Ali | 13 Dec 2020, 07:12 PM |
| test Dear Miss Streep & Mr Connery lyh... | Mo Ali | 13 Dec 2020, 06:59 PM |
| test Dear Miss Streep & Mr Connery fdx... | Mo Ali | 09 Dec 2020, 02:27 PM |

test 2
To: Miss Meryl Streep (cathypiotrowski@talk21.com)
From: Mr PC Catman
13 Dec 2020, 07:12 PM
2.png
Dear Miss Streep & Mr Connery

Click on each email to view the content of each in the right hand pane.

Pupil Docs & Comms Store

Uploading Files to the Document Store

You can **manually import any externally prepared document** to a pupil's Document Store.

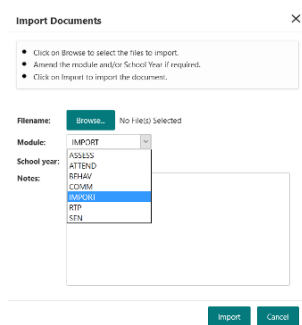
1. Go to **General > Student Details >** find the pupil record and click on the **Documents** tab > click on the

Upload Documents



icon. In the next pop-up window, click **Browse** and locate and select the file you wish to import.

You can select more than one file if you wish.



The 'Import Documents' window includes a 'Browse...' button, a 'Module' dropdown menu (with options: IMPORT, ASSESS, ATTEND, BEHAV, COMM, RTP, SEN), a 'School year' dropdown, and a 'Notes' text area. At the bottom are 'Import' and 'Cancel' buttons.

Note that the **Module** option is defaulted to IMPORT – you can change this to any of the other options i.e. ASSESS; ATTEND; BEHAV; COMM, IMPORT, RTP, SEN to associate the document more closely to its purpose should you wish.

You also have the option to add any notes about the document.

2. Click **Import** to start the process.

The next pop-up window will confirm the file(s) you are importing and validate the file type and file size.

If any files are not of the type permitted or a file has exceeded the file size limit of 10Mb, the filename will appear in red and will not be imported.

3. Click **Import** to proceed and then click **OK** to the confirm message

Other documents that can be generated and stored in Document Store automatically:

Absence Follow-Up Letters - see [LiteBite 25 - Absence_Late_Follow-up Letters](#)

Mailmerged documents and letters – see [LiteBite 14A – Using Communicate to Mailmerge](#)

Viewing all the documents (for all pupils) stored in Document Store

Go to **Modules > Administration > Document Storage >** to see a table with the range of documents used and stored for each pupil.

You can select to filter on any of the options below for any academic year – click the **Filter** icon to apply the filters to a search.

Download Student Documents

| Filter List | | | | | | | | | |
|--------------|-----------|-----------------------------------|---------|-----------------------|------------|-------------|-------|---------------|---------|
| Module: | --All-- | Function: | --All-- | Template: | --All-- | Year Group: | 4 | Class: | --All-- |
| School Year: | 2013/2014 | Type: | --All-- | | | | | | |
| Module | Function | Document | Type | Student | Date Gen. | YG | Class | File | |
| IMPORT | IMPORTED | LiteBite6_MobileAttendanceJan2014 | doc | Allison, Jen (252) | 22/04/2014 | 4 | 1B | Download File | |
| COMM | LETTER | SportsTrip | rtf | Allison, Jen (252) | 25/11/2013 | 4 | 1B | Download File | |
| COMM | LETTER | SportsTrip | rtf | Coppard, Claran (235) | 25/11/2013 | 4 | 2A | Download File | |
| COMM | LETTER | SportsTrip | rtf | Evetts, Kieran (253) | 25/11/2013 | 4 | 2A | Download File | |
| COMM | LETTER | SportsTrip | rtf | Lawrence, Amber (243) | 25/11/2013 | 4 | 2A | Download File | |
| COMM | LETTER | Welcome_letter | rtf | Coppard, Claran (235) | 25/11/2013 | 4 | 2A | Download File | |

You can also download any file

From the resulting table of entries, you can sort the table by clicking on any of the column headers (e.g. sort by document name/ student name etc.)