AcademicEHR
powered by **Procentive**

Creating Documents in Procentive

The Documents Module allows you to upload and store files into Procentive. We suggest that you use the Program directory as these will be a list of courses for your school.

Getting Started

1. **Click on the Documents** Documents in the upper left side of the screen.

2. Select the "Programs" ⦿ Programs along the top of the screen.

3. Below, you will see a list of the current Courses. Select the Course by double-clicking on it or clicking on the black drop down arrow. A blue, "new sub-directory" link new sub-directory will appear in the properties column, on the right-hand side of the screen.

Name	File Name	Size	Date Created	Date Modified
▶ 946 (2016_Winter)				

4. Click on the "new sub-directory" link.
   A new "Untitled" sub-directory will appear under the Course. Once the new sub-directory appears, new options appear in the column: change, delete, new subdirectory, new file, and a drop-down to create new file from template. Creating a sub-directory within a course allows you to store documents.

Name: Untitled
change   new sub-directory   new file
[create new file from template...] ▼

5. Rename the sub-directory.

6. Click the blue "change" link to save your changes.

Name: My First Sub Directory
change   new sub-directory   new file
[create new file from template...] ▼

7. You will see your subdirectory beneath the course.

Note: Highlighting your newly-created sub-directory, then clicking repeating the steps above creating a new sub-directly will create a sub-directory under your previously created sub-directory.
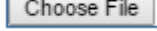

Adding Files

You can add files to any of the sub-directories you create.

1. Click the sub-directory you would like to save the document in. It will turn tan.

2. Click on the "new file" link _new file_ in the properties column. It may be purple if you have clicked on it previously in the same session. New options appear in the properties column that allow you to rename the file, add a description, make the file a template, tag the file, and to save a document.

   You can save documents in the system 2 different ways:

   • Upload a document from your computer by clicking on the "Choose File" [Choose File] button.

   • Scan directly into Procentive using the "Scan" _scan_ link.

3. For training, we will use the "Choose File" button. Click the "Choose File" button.

4. Click the blue "change" _change_ link to save your progress.
   You will be able to see the file name and size in the sub-directory you saved it under.

5. To view the file again, double-click the line with the name and filename of your desried file and the document will download to your computer.
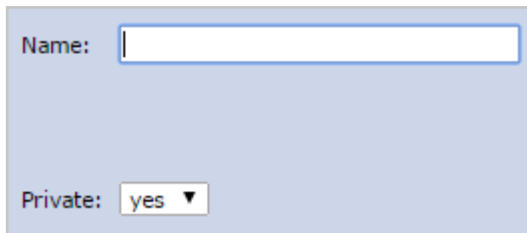
Tags and Other Search Options

"Tagging" a file makes searching for files relating to a certain topic simple.
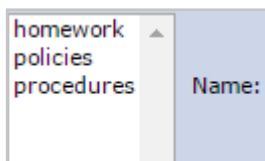
Add Tags

Before you can tag a file, you will need to add tags. To do this, you must be at the document level (you can either add a "new file" or click on a file you have already created). In the properties column, the list of "Tags" will initially be empty. For training purposes, we will tag the document we recently uploaded.

1. Highlight the document line you want to add a tag to. It will turn tan.

2. Click on the blue "tags"link _tags_ . A new window will open.

3. Give your tag a name.

    Here are a few examples, not necessarily needed for the same document.

4. Choose if your tag is private or not.

    Private means your tags will be private for yourself. Nobody else will be able to see your tag. Click the "Add" button Add to save. You have created a tag. Now scream with excitement! Okay, maybe just pat yourself on the back because you are probably in an office. Possibly pretend to scream?

5. To create more tags, repeat steps three through five (including screaming or patting yourself on the back).

Edit a Tag

1. In the tags box, click a tag you want to change.

2. Rename and change the Private setting as you wish.

3. Click the "Change" button Change . Your changes will save.

Adding Tags to a File

In the properties column, select one or more tags that this file has (to select more than one, use control or shift and click on all of the desired tags). Once the tags have been selected, click on the blue "change" link and the tag will be attached to the file. After this is done, you can filter by tags in the upper area of the Documents Module. Selecting a "Tag" from the "Tags" drop-down field will make a new window open that lists all of the files in your database with the selected tag. The window will display the name you associated with the file, the actual file name, the file size, and the location of the file. The name you gave the file in Procentive will be a blue link, and clicking on it will bring you directly to the file.

You will be able to tell that the tag is linked to the document because it will be highlighted.

NOTE: You MUST be in the correct "Main File" for the system to bring you to the file location.

Removing Sub-directories and Files

1. Select the course by double-clicking on it or clicking on the black drop down arrow.

Name	File Name	Size	Date Created	Date Modified
▼ 946 (2016_Winter)				

2. Click once on the Sub-directory so that it becomes highlighted and the properties column appears on the right-hand side of the screen.

3. Click "delete" to delete the sub-directory.

IMPORTANT

Deleting a sub-directory will also delete all files stored within that sub-directory. Once the sub-directory is deleted, you cannot recover the saved files that were within that sub-directory.