Introduction to:
Documentation Linkage for Adult Education

January 2021

Adult Education Documentation Linkage

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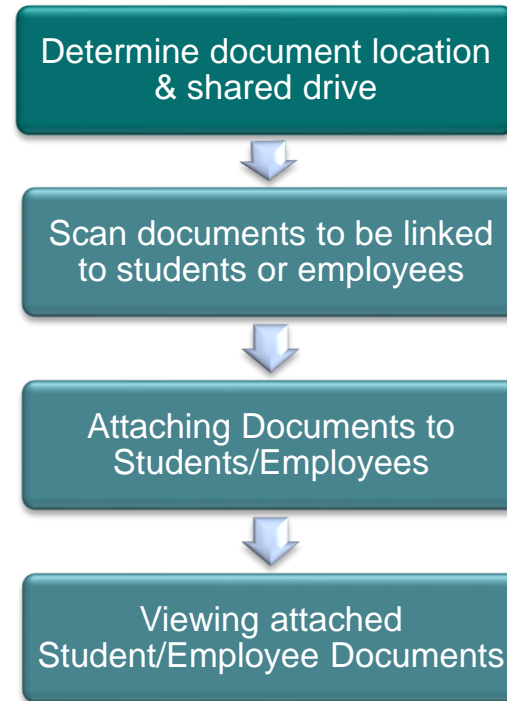# Adult Education Documentation Linkage

Overview

ClassMate for adult education enables users to link locally scanned .PDF documents directly to students or employees in a centralized database

Instructor Examples:
- Teaching License

Student Examples:
- High School Diploma/Transcript
- Background Check

```
Determine document location
& shared drive
        ↓
Scan documents to be linked
to students or employees
        ↓
Attaching Documents to
Students/Employees
        ↓
Viewing attached
Student/Employee Documents
```

Adult Education Documentation Linkage

Module Assignment

Administrative Modules

Category: Student Processing
- Student Registration/Enrollment
- Student Snapshot

Category: Personnel Management
- Employee Management

Teacher Modules

Category: Teacher Discipline
- Student Snapshot

Adult Education Documentation Linkage

Network Setup

Prior to linking any document(s) sites must create a centralized location within their network to be shared. The locally stored documents will then be available to users to attach document(s) to student(s)/employee (s) via the newly mapped drive. All users must have access to the same drive

Getting Started

1. A centralized shared repository must be setup on the local network. A folder or folder structure somewhere in the network must be setup and shared.

2. Copy **ALL**.pdf files to be attached to students/employees in ClassMate and place within the shared folder structure

3. A client connect to the share must be established on all clients that will either attach or view documents from that share. The share letter must be the same for all local users. For example, if the share is setup on one client as the I: drive, then all clients must have the share setup as the I: drive
   This can be any drive except C: M: V: or Z:

4. The drive designation that has been setup at a local site must be provided to ClassMate in order to allow for the necessary adjustments. These modifications will allow the shared drive, on the supplied designator, to be mapped. This mapped share will then be available as a browsing choice from within the ClassMate application

5. This mapping will occur when a user logs into either LaunchPad or the Published ClassMate application

6. **You can utilize NextCloud to sync your local network folder to ClassMate to allow for ease of document linking. Please contact Support if you require NextCloud credentials and visit our website for documentation on setup.**
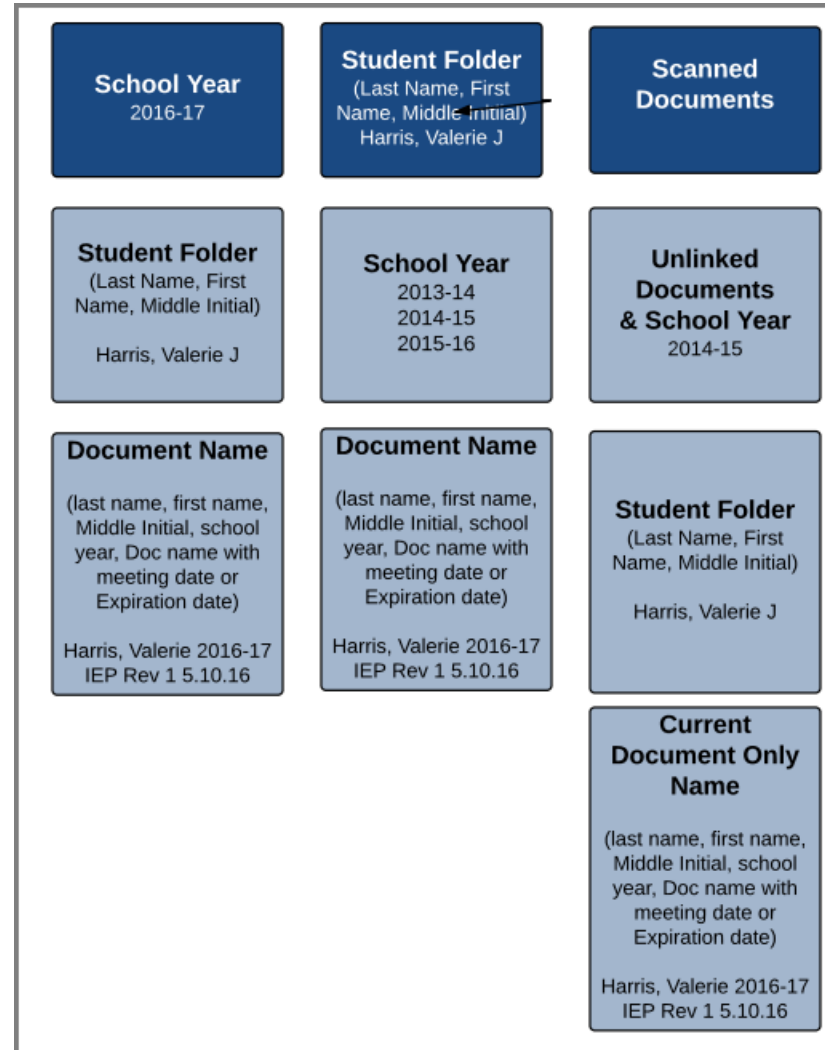
Adult Education Documentation Linkage

Best Practices: Network File Names

Prior to linking any document(s) sites must create a centralized location within their network to be shared. The locally stored documents will then be available to users to attach document(s) to student(s) via a newly mapped drive.

A file naming convention must be established and clearly communicated to staff that will be scanning, naming and linking the documents. A best practice is to mimic or recreate the filing structure you currently use outside of ClassMate. If you currently file documents by school year then create the top of the file structure by year.

A clear understanding of who, when and how files are linked, unlinked and archived must be created prior to any scanning and document linkage

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Linking Employee related Documents

The Employee Management module allows users the ability to link documentation to specific employees. Documents such as required employment forms, teaching licenses, etc. are useful to have on hand in the event of an audit. These documents must be saved in PDF file format in order to be linked within ClassMate. The documents linked can then be viewed by staff with specific modules assigned. This functionality should be limited to administrative staff.
To link documentation to a student in the PDF file format :

Modules > Personnel Management > Employee Management - Note: ONLY PDF documents can be attached

1. Select the **Employee**
2. Select the **Linked Documents Tab.** This tab name can be customized
3. **Browse** to the file location you would like to link by clicking the **BLUE BROWSE** button. Select the .PDF file desired (this is the ONLY) acceptable file format that can be used

Adult Education Documentation Linkage
Linking Employee related Documents

④ If you are attaching a form that you track on the forms tab, using the drop down menu, select the **form**

⑤ If you selected a form, the **Document Name** will auto populate with the exact form name. If you have not selected a form, manually enter the form name in the field

⑥ Add the selected document/form by Clicking the **BLUE ADD DOC** button. The document will now display in the grid, along with any other previously linked documents. If you have selected a form, the form will be marked on the forms tab

Add A Document

File Location	V:\Users\HS81012\Desktop\linkagedoc.pdf	③ Browse
Form	Teaching Certificate	④
Name	Teaching Certificate	⑤ Add Doc ⑥

General | Position | Rates | Qualified Courses | Forms | Create/Modify | Linked Documents

View Document

Name	Last Updated	Location	ID
201718 AndersenA background	08/30/2017 2:06:50 PM	M:\ClassMate\AdultEd\Doc Linkage Samples\AE doc link...	5
201718 Harris, Sam Teaching License	04/03/2018 3:57:25 PM	M:\ClassMate\AdultEd\Doc Linkage Samples\AE doc link...	8
test	09/12/2017 11:31:26 AM	M:\IEP Docs\ClassLink ClassMate.pdf	6

Adult Education Documentation Linkage
Viewing linked documents and tracking forms

⑦ Select the document then select the **BLUE VIEW DOCUMENT** button to display the .PDF document

⑧ If you selected a form, select the **Form Tab**, and you will see the form has been marked as having been received. The selected form can also be viewed from the forms tab

General	Position	Rates	Qualified Courses	Forms	Create/Modify	Linked Documents

View Document ⑦

Name	Last Updated	Location	ID
Teaching Certificate	05/09/2018 8:34:38 AM	V:\Users\HS81012\Desktop\linkagedoc.pdf	2

General	Position	Rates	Qualified Courses	Forms	Create/Modify	Linked Documents

Indicate which of the required forms have been received from this employee.

⑧ View Form

| Form	Form ID	Document Location	Document ID	
☐ FA FAFSA Application	001803			
☐ Job Application	001801			
☑ Teaching Certificate	001802	V:\Users\HS81012\Desktop\linkagedoc.pdf	2	

Adult Education Documentation Linkage
Linking Student related Documents

The Registration/Enrollment module allows users the ability to link documentation to specific students. Documents such as required background checks, diplomas, transcripts, etc. These documents must be saved in PDF file format in order to be linked within ClassMate. The documents linked can then be viewed by staff with specific modules assigned. The ability to link documents directly to students should be limited to administrative staff.

To link documentation to a student in the PDF file format :

Double Click **Modules** > Double click **Student Processing** > Click **Registration/Enrollment**
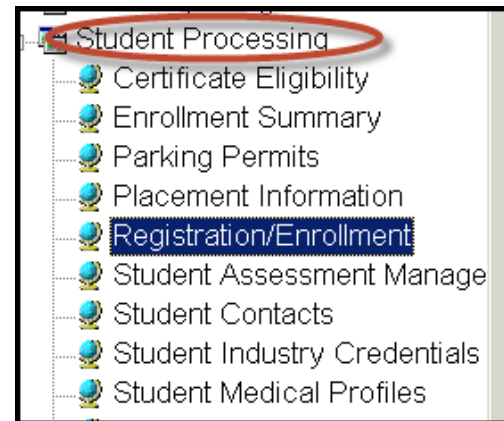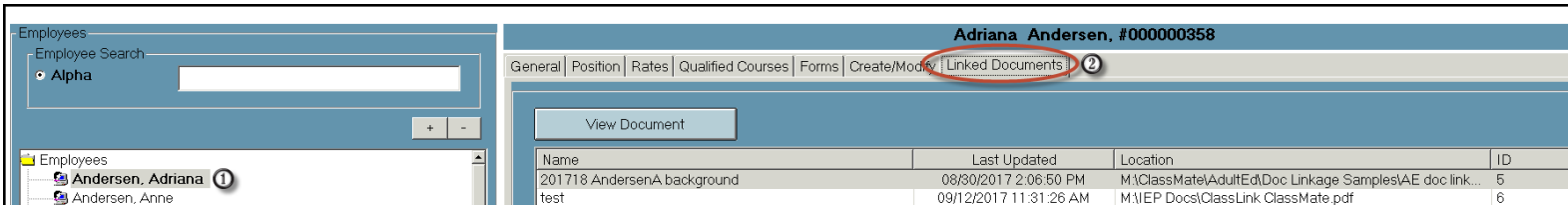
Note: ONLY PDF documents can be attached in ClassMate

Adult Education Documentation Linkage
Linking Student related Documents

① Select the **Student**

② Select the **Linked Documents Tab.** This tab name can be customized

③ **Browse** to the file location you would like to link by clicking the **BLUE BROWSE** button. Select the .PDF file desired. PDF's are the **ONLY** acceptable file format

Adult Education Documentation Linkage
Linking Student related Documents

④ If you are attaching a form that you track on the forms tab, using the drop down menu, select the **Form Category**

⑤ If you are attaching a form that you track on the forms tab, using the drop down menu, select the **Form Name**

⑥ If you selected a form, the **Document Name** will auto populate with the exact form name. If you have not selected a form, manually enter the form name in the field

⑦ Determine which staff should have access to view the document: no selections, Staff or Teacher options

⑧ Add the selected document/form by Clicking the **BLUE ADD DOC** button. The document will now display in the grid, along with any other previously linked documents. If you have selected a form, the form will be marked on the forms tab

Add A Document

File Location:	V:\Users\HS81012\Desktop\linkedocsample.pdf	③ Browse
Form Category	Uncategorized	④
Form	Graduation-HS Diploma	⑤
Document Name:	Graduation-HS Diploma	⑥

☑ Staff Viewable
☑ Teacher Viewable ⑦

⑧ Add Doc

Note: When selecting staff access no selection mean only those with administrative modules can view: Staff includes paraprofessionals or teachers.

Adult Education Documentation Linkage

Viewing linked documents and tracking forms

⑦ Select the document then select the **BLUE VIEW DOCUMENT** button to display the .PDF document

⑧ If you selected a form, select the **Form Tab**, and you will see the form has been marked as having been received. The selected form can also be viewed from the forms tab by selecting the **BLUE VIEW FORM** button

| General | Position | Rates | Qualified Courses | Forms | Create/Modify | Linked Documents |

View Document ⑦

Name	Last Updated	Location	ID
Teaching Certificate	05/09/2018 8:34:38 AM	V:\Users\HS81012\Desktop\linkagedoc.pdf	2

| General | Position | Rates | Qualified Courses | Forms | Create/Modify | Linked Documents |

Indicate which of the required forms have been received from this employee.

⑧ View Form

Form	Form ID	Document Location	Document ID	
☐ FA FAFSA Application	001803			
☐ Job Application	001801			
☑ Teaching Certificate	001802	V:\Users\HS81012\Desktop\linkagedoc.pdf	2	

Adult Education Documentation Linkage

Customizing the Document Tab

This module allows users the ability to customize the name of the documents tab found in the modules with the linkage option. The name created here will display across **ALL** special modules
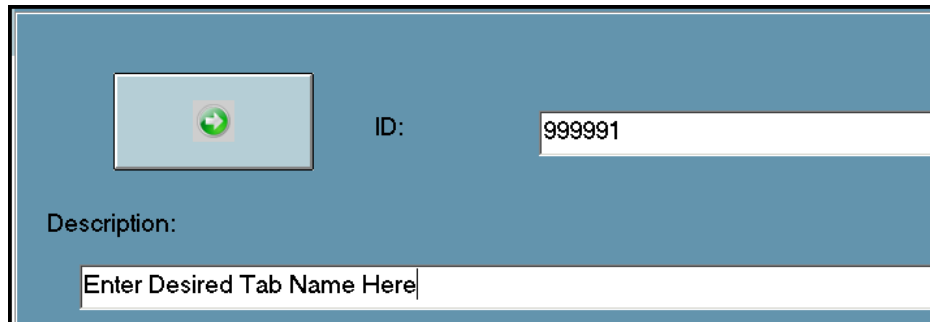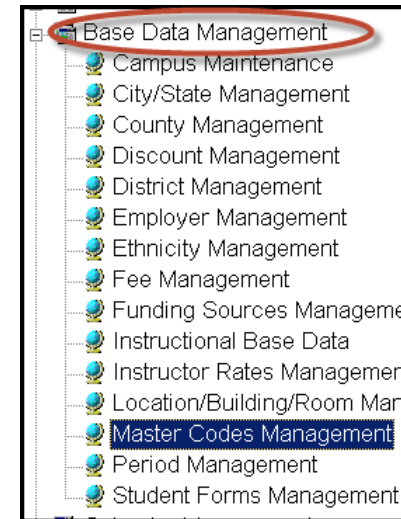
Double Click **Modules** > Double click **Base Data Management** > Click **Master Codes Management**

Scroll to the **Docs Tab Name** (999991-999991)

Click the Arrow to create Next ID

Enter Tab Name in Description field

Click the "**Save "** icon**.**

Note: The tab name will display on ALL linkage tabs. This is a globally displayed name

Adult Education Documentation Linkage

Viewing Employee & Student Documents

After the documents have been linked, administrators, staff and teachers will have **"View Only"** access to the documents. The modules used to view the documents will vary by staff type
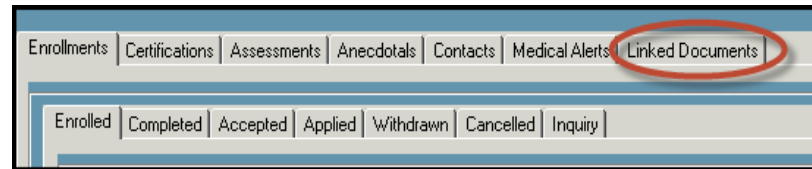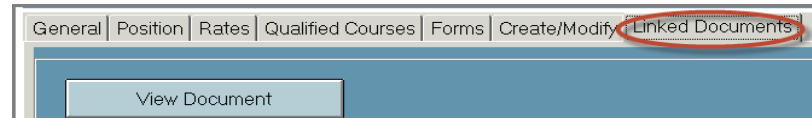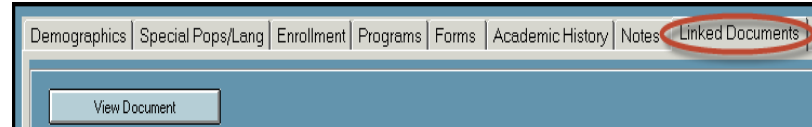
View Documents in:

Administrators/Staff:
Student Registration/Enrollment
Employee Management

Teachers:
Student Snapshot

Adult Education Documentation Linkage
Linked Document Reports

Document View Reports

- Currently within ClassMate there are three reports that can be utilized to show who has been viewing the documents that have been linked to students & employees
- To access these reports go to: **Reports > System Administrator**
- Reports are titled:
  - Document View by Student
  - Document View by User
  - View by Document

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