Storyboard

TFACTS Document Storage: Associating Documents to Multiple Persons

This storyboard will illustrate the three methods of associating a document to multiple persons as well as how to remove a document association from one or more persons.
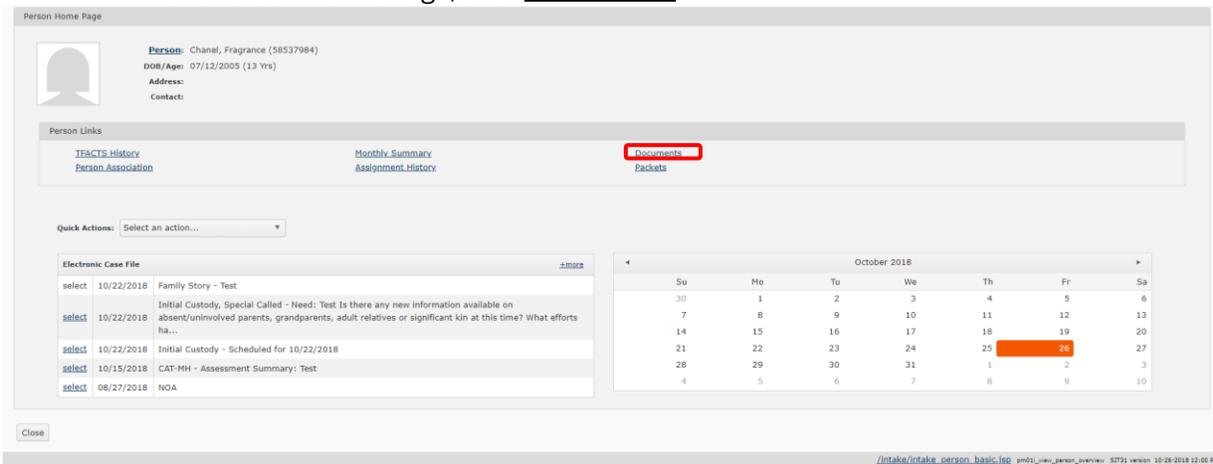
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Associating Documents to Multiple Persons

TFACTS will allow documents to be associated to multiple persons at the time a document is initially uploaded and even after a document has been uploaded in the past. There are three basic methods for associating documents to multiple persons and all three methods apply at both initial upload and previously uploaded documents.
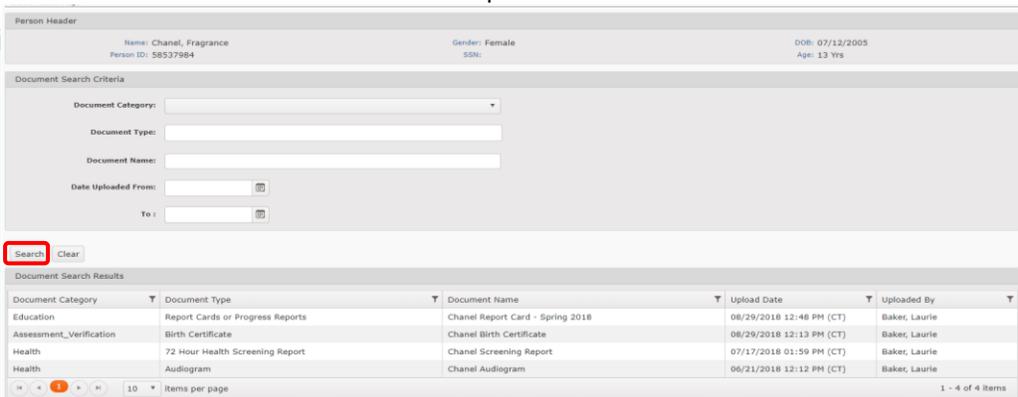
TFACTS will also allow document associations to be removed from persons.
This storyboard will illustrate the three methods of associating multiple persons to a document as well as how to remove association between a document and one or more persons.

Other Associated Persons – Document Detail Screen

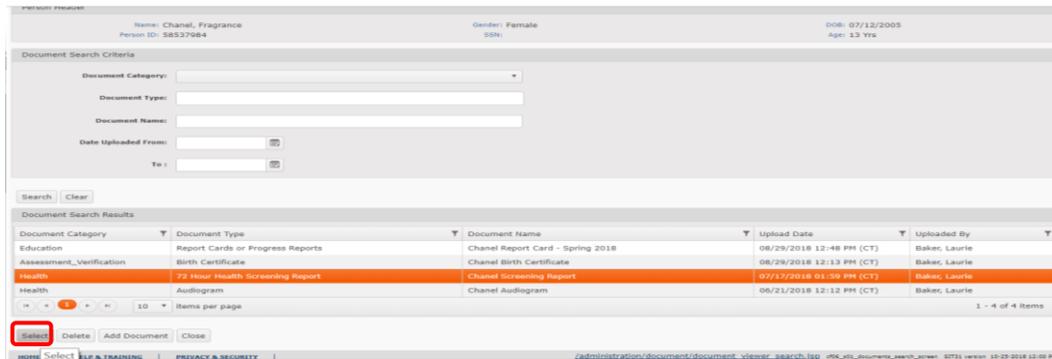- From the Person Home Page, click **Documents**.

- Once on this page, click **Search** without entering any criteria to bring a listing of all documents associated with the person in focus.
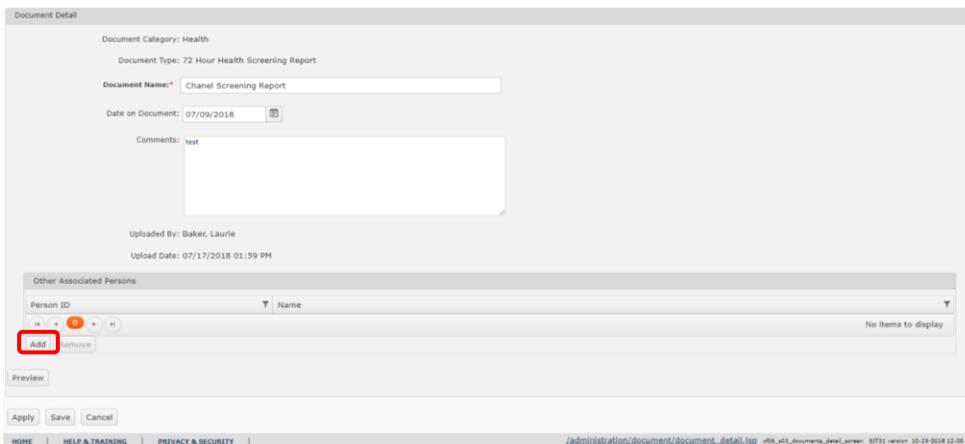
- Click on the document you wish to associate with additional persons to highlight it and then click **Select**.


- Notice the Other Associated Persons section at the bottom of the screen, click **Add**.

- The **Select Other Persons** screen displays. All three methods for associating multiple person are accessed from this screen.
- A list of all persons Associated with the person in focus will display.
- Click the row(s) of the associated person(s) to which the document will be associated. Now click **Choose**.
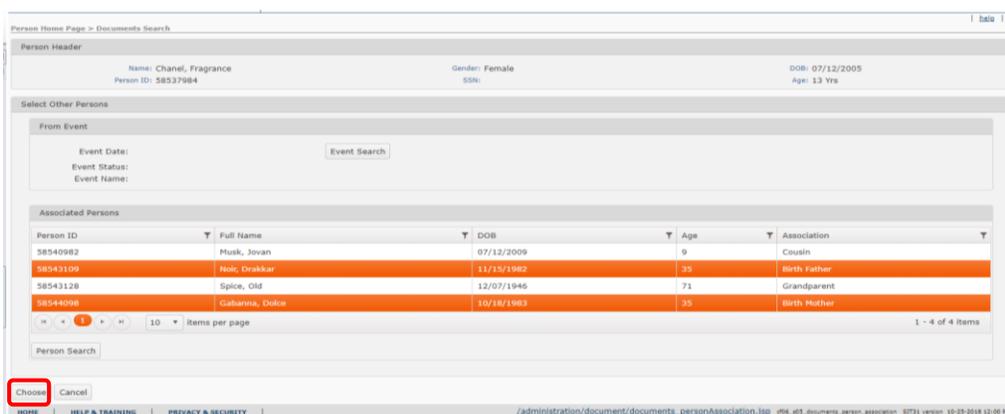
- The document is now associated with the selected Associated Persons.
- Click **Save**.
- To verify that the document is visible on the newly associated persons' record, navigate to their Person Home Page, click on **Documents** and then **Search** to display the person's documents.
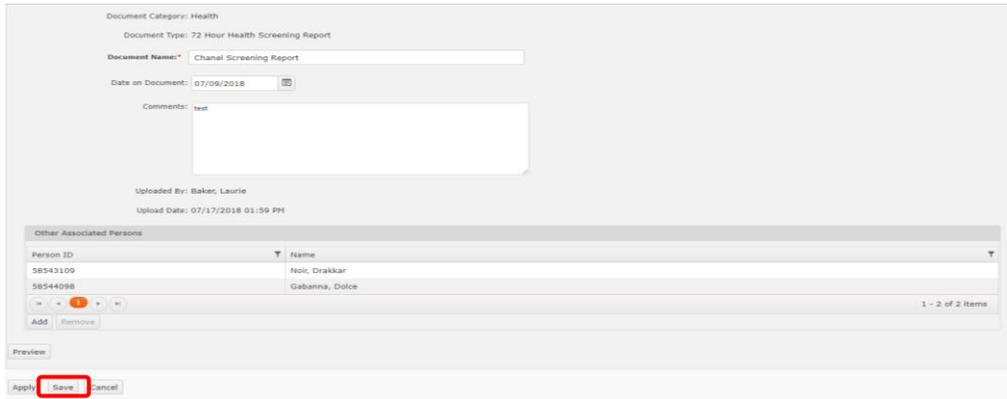
## Events – Select Other Persons

This method uses an Event to associate a document to multiple persons. It is important to note that the use of an Event record in this process is to identify persons who are associated to an event. The documents will be associated to select event persons/participants. The document WILL NOT be associated to the event itself.

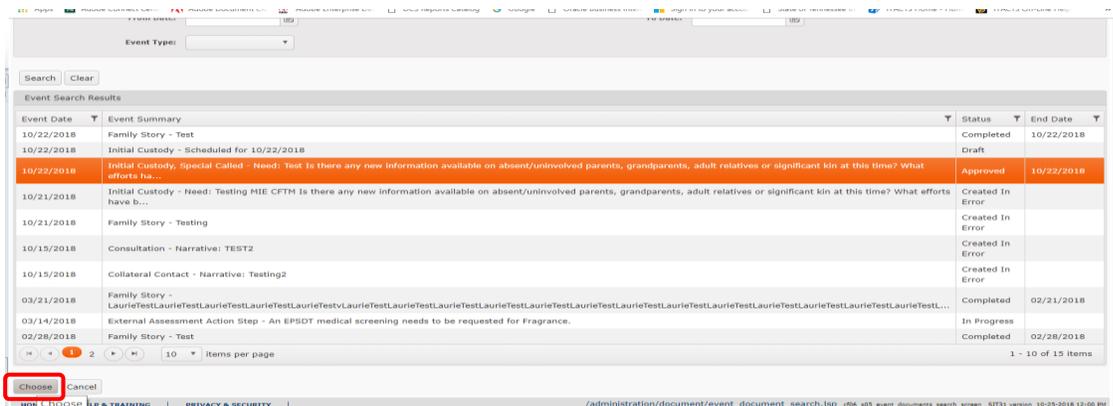- From the **Select Other Persons** screen, click **Event Search**.
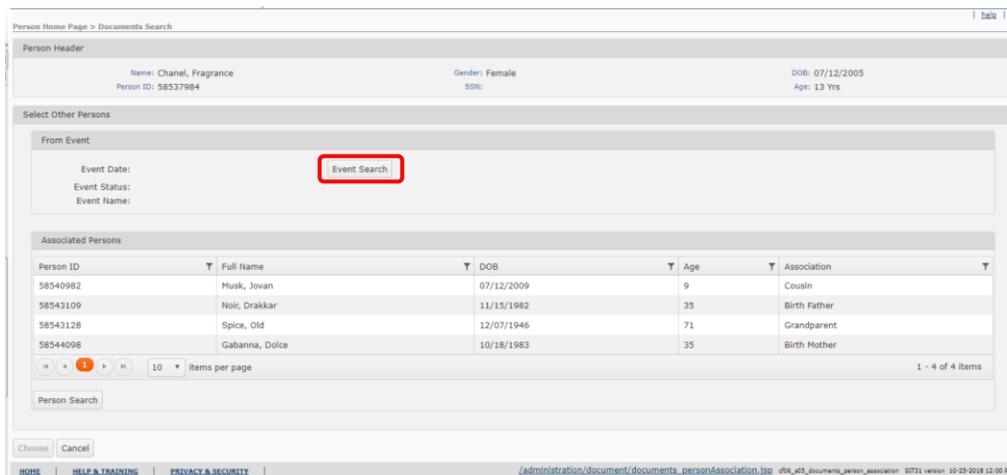
- Click **Search** or use the **Event Search Criteria** to narrow the search for events associated to the person in focus.
- A list of events for the person in focus will be displayed.
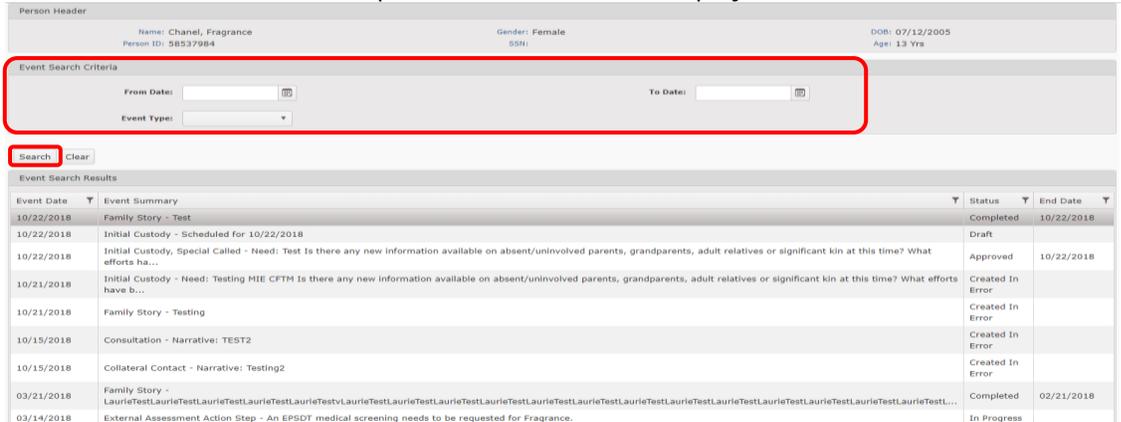
- To associate the document to one or more persons associated with the event, click on the event to highlight it, and then click **Choose**.

- A list of all persons associated with the event is displayed. Click on one or more persons to whom the document will be associated to select them, then click **Choose**.
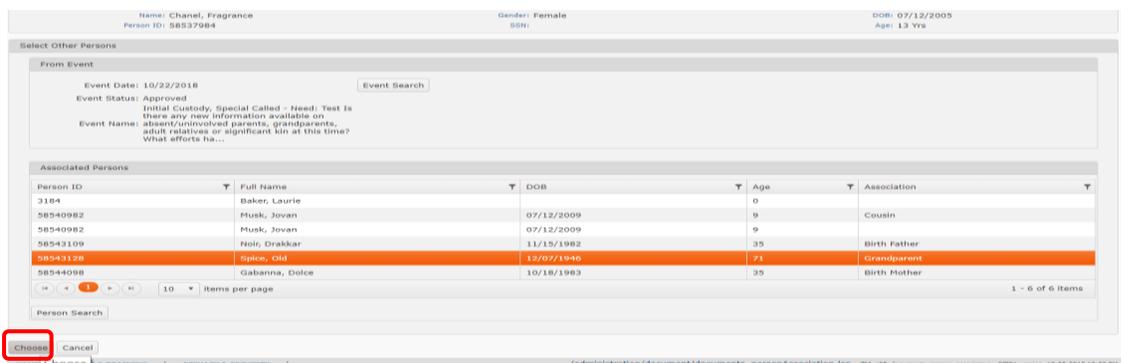
- The person(s) selected from the event are now associated to the document.
Note: Remember, the document is NOT associated with the event.

Person Search – Select Other Persons

This method uses Person Search to allow the association of a document to any Person in TFACTS. If a person does not have an association with the person in focus and is not associated with an Event with the person in focus, you can still associate a document to that person using **Person Search**. When you **Choose** a person from Person Search results, that person will be added to the Person Associations of the person in focus. The only downside to this method is that you can only search for and choose one person at a time.

- From the **Select Other Persons** screen, click **Person Search**.

- Identify the person from search results and click **Choose** for that result row.

- That person is now added to the Associated Persons list. Click on the Associated Person(s) to highlight and associate with the document, click **Choose.**

- The document is now associated to the person(s).

Remove a Document Association from a Person

If a document was associated to the wrong person or otherwise needs to be removed from a person's record, you can choose to do this from the **Documents** of the person from whom the document will be removed or you can do it from the Document Detail screen where the list of all persons associated with a document can be seen.

- From the Document Detail page for a specific document for the person in focus, the person(s) associated to the document are listed. Click on the row of the person to be removed to highlight it, then click **Remove**.

Document Detail	
Document Category: Health	
Document Type: 72 Hour Health Screening Report	
Document Name:*	Chanel Screening Report
Date on Document:	07/09/2018
Comments:	test
Uploaded By: Baker, Laurie	
Upload Date: 07/17/2018 01:59 PM	

Other Associated Persons

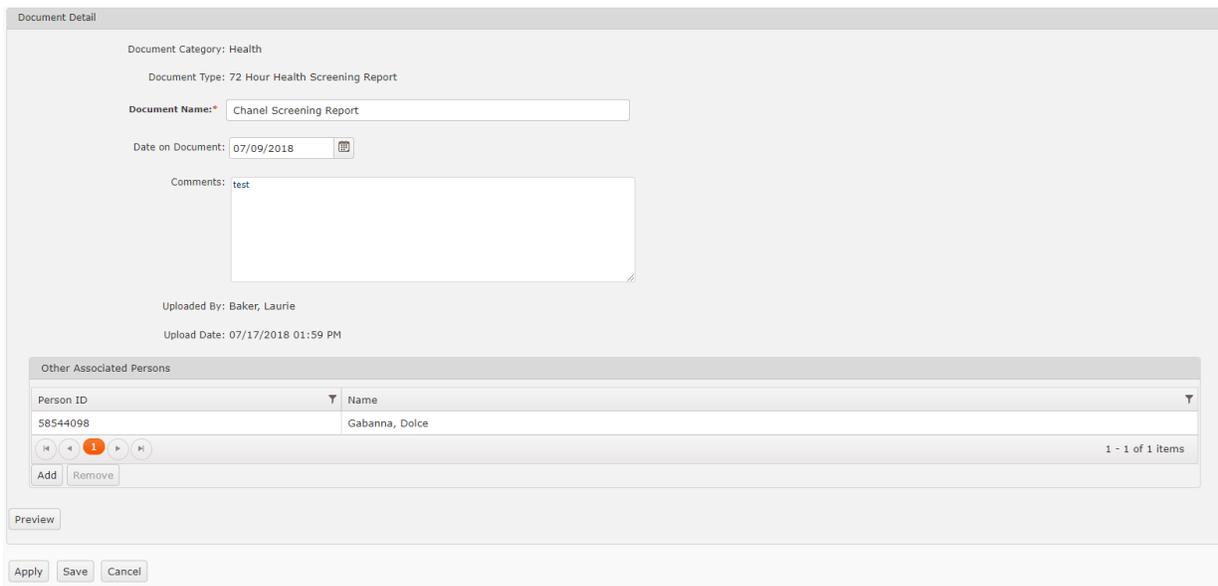| Person ID	Name
58544098	Gabanna, Dolce
3184	Baker, Laurie

1 - 2 of 2 items

Add Remove

Preview
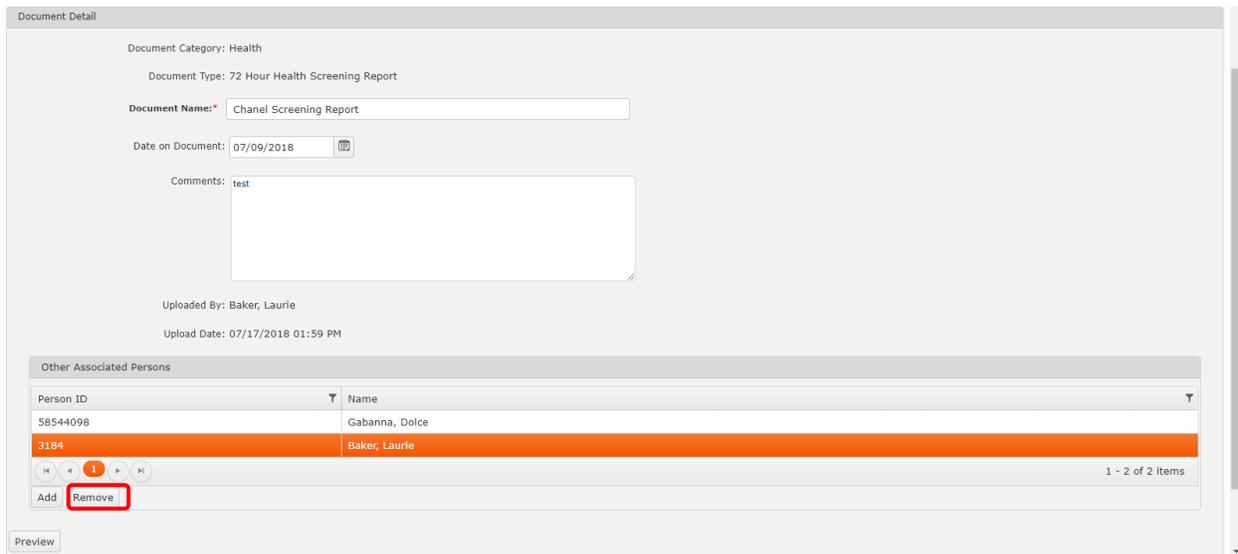
- The person is removed from the list of Associated Persons for the document.

Document Detail	
Document Category: Health	
Document Type: 72 Hour Health Screening Report	
Document Name:*	Chanel Screening Report
Date on Document:	07/09/2018
Comments:	test
Uploaded By: Baker, Laurie	
Upload Date: 07/17/2018 01:59 PM	

Other Associated Persons

Person ID	Name
58544098	Gabanna, Dolce

1 - 1 of 1 items

Add Remove

Preview

Apply Save Cancel

You have completed this storyboard.