



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.

Table of Contents

Associating Documents to Multiple Persons	2
Other Associated Persons – Document Detail Screen	2
Events – Select Other Persons	4
Person Search – Select Other Persons	6
Remove a Document Association from a Person	8

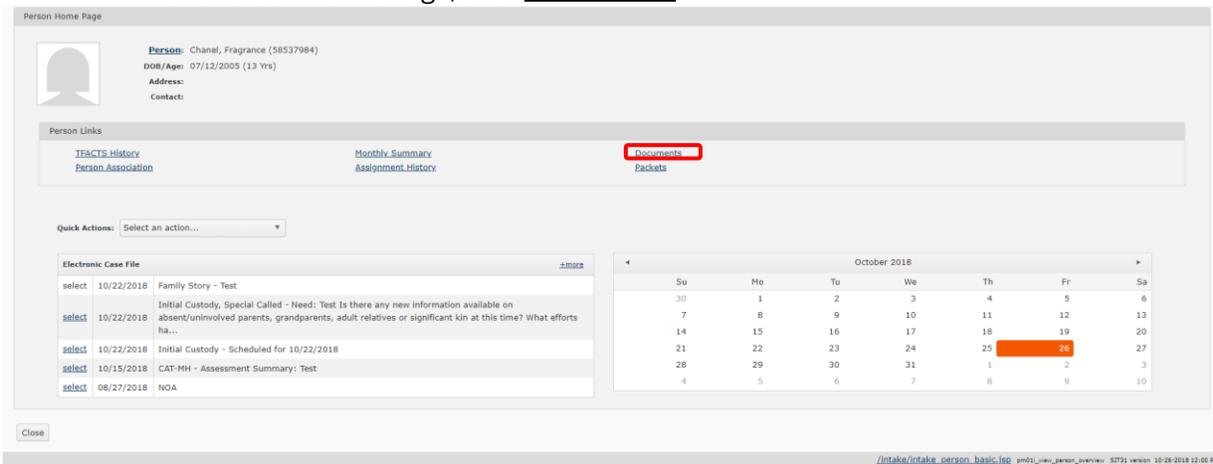
Associating Documents to Multiple Persons

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.

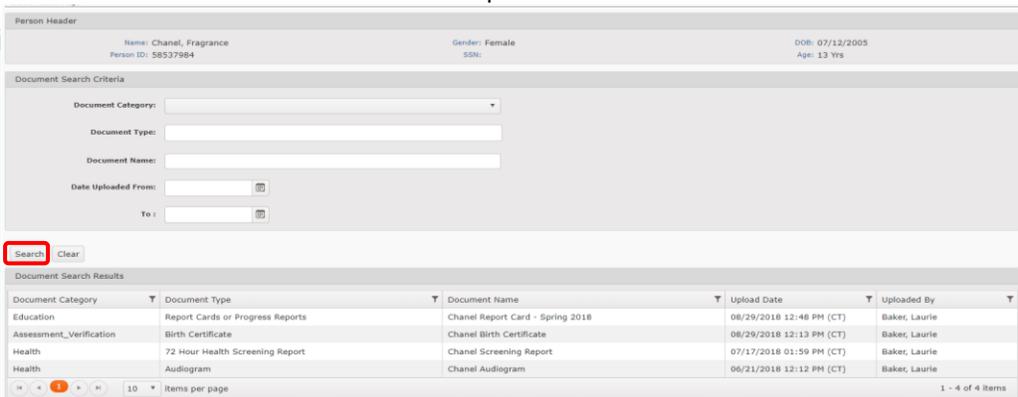
TFACTS will also allow document associations to be removed from persons. This storyboard will illustrate the three methods of associating multiple persons to a document as well as how to remove association between a document and one or more persons.

Other Associated Persons – Document Detail Screen

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

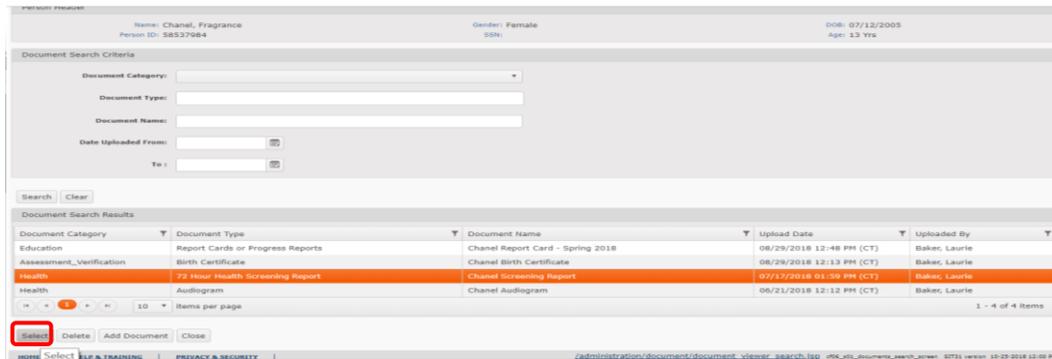


- Once on this page, click **Search** without entering any criteria to bring a listing of all documents associated with the person in focus.

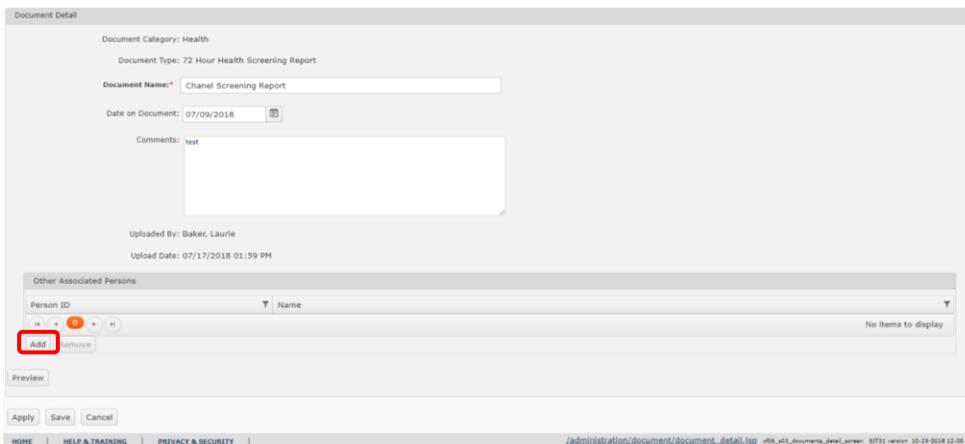


TFACTS Storyboard • Document Storage- Associating Documents to Multiple Persons

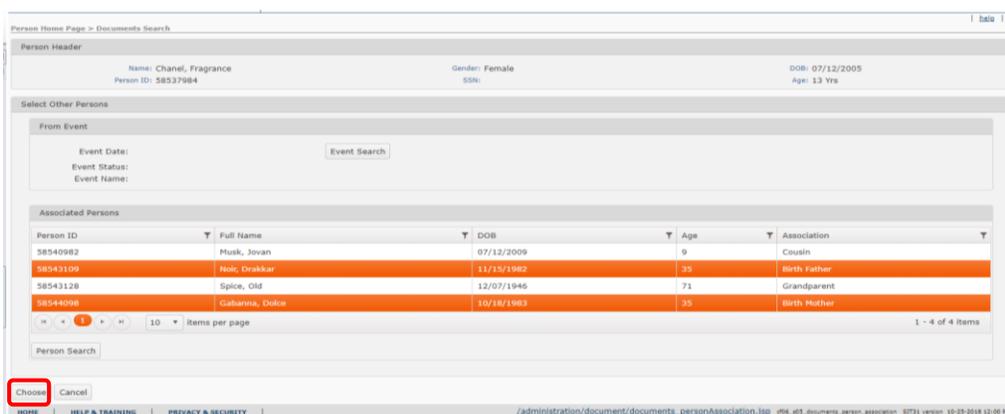
- Click on the document you wish to associate with additional persons to highlight it and then click **Select**.



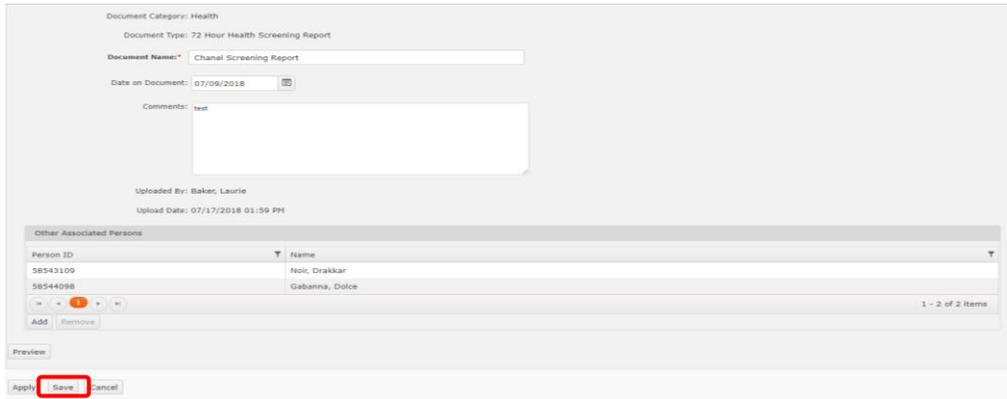
- Notice the Other Associated Persons section at the bottom of the screen, click **Add**.



- 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**.



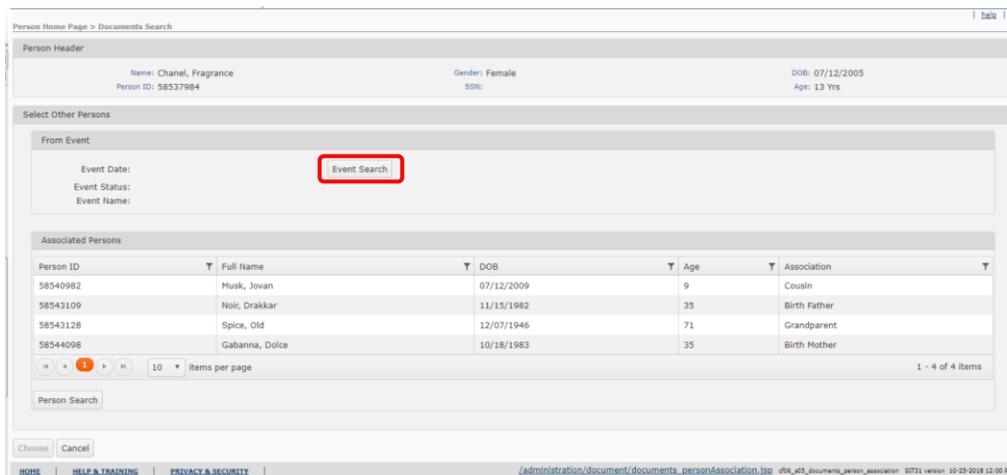
- The document is now associated with the selected Associated Persons.
- Click **Save**.
- To verify that the document is visible on the newly associated persons' record, navigate to their Person Home Page, click on **Documents** and then **Search** to display the person's documents.



Events – Select Other Persons

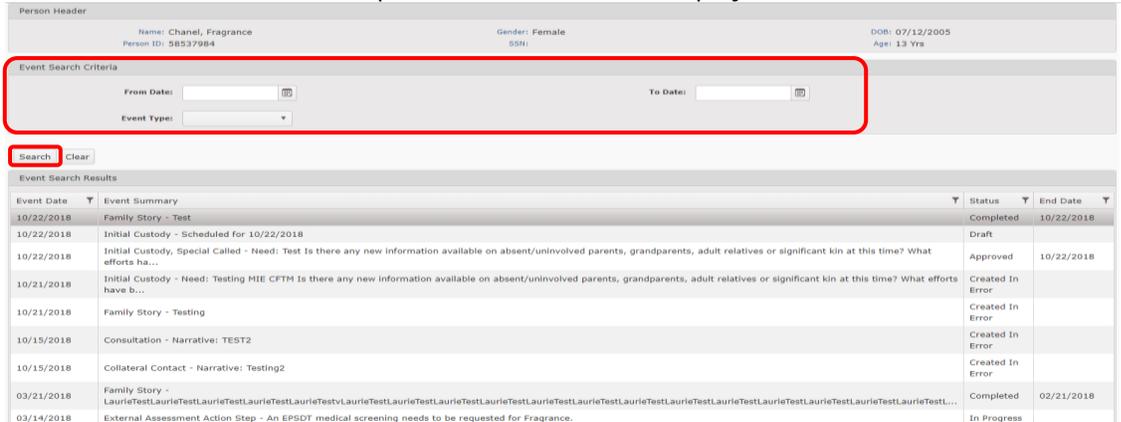
This method uses an Event to associate a document to multiple persons. It is important to note that the use of an Event record in this process is to identify persons who are associated to an event. The documents will be associated to select event persons/participants. The document WILL NOT be associated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

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

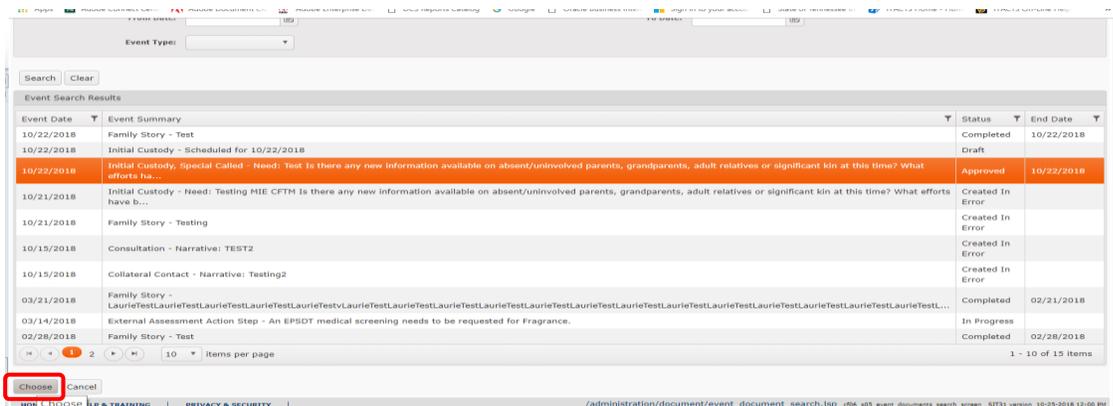


TFACTS Storyboard • Document Storage- Associating Documents to Multiple Persons

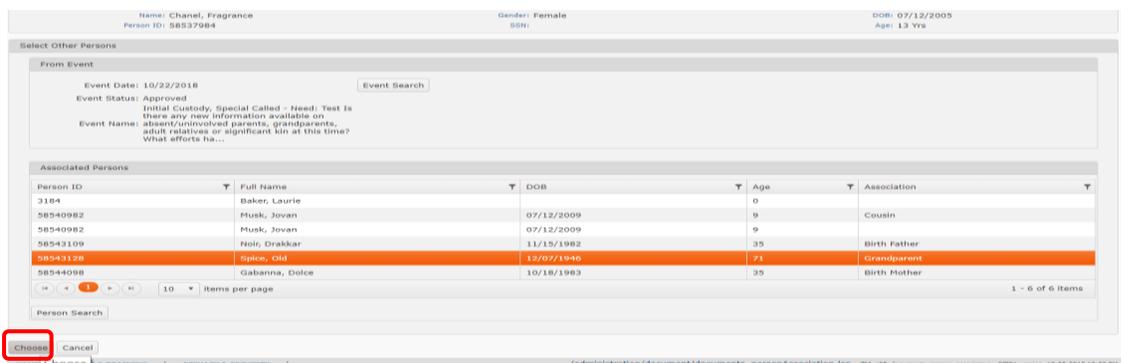
- Click **Search** or use the **Event Search Criteria** to narrow the search for events associated to the person in focus.
- A list of events for the person in focus will be displayed.



- 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**.



TFACTS Storyboard • Document Storage- Associating Documents to Multiple Persons

- The person(s) selected from the event are now associated to the document.
Note: Remember, the document is NOT associated with the event.

The screenshot displays the 'Person Header' and 'Document Detail' sections. The person's name is Chanel, Fragrance, with a person ID of 58537984, gender of Female, and a date of birth of 07/12/2005. The document is a 'Birth Certificate' with the name 'Chanel Birth Certificate'. It was uploaded by Laurie Baker on 08/29/2018 at 12:13 PM. Below the document details, there is a section for 'Other Associated Persons' which currently lists one person: Spice, Old, with person ID 58543128.

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**.

The screenshot shows the 'Select Other Persons' interface. At the top, it displays the person's header information: Chanel, Fragrance (Person ID: 58537984), Female, DOB: 07/12/2005, Age: 13 Yrs. Below this, there is a 'From Event' section with fields for Event Date, Event Status, and Event Name, and an 'Event Search' button. The main section is 'Associated Persons', which contains a table with the following data:

Person ID	Full Name	DOB	Age	Association
58540982	Musk, Jovan	07/12/2009	9	Cousin
58543109	Noir, Drakkar	11/15/1982	35	Birth Father
58543128	Spice, Old	12/07/1946	71	Grandparent
58544098	Gabanna, Dolce	10/18/1983	35	Birth Mother

Below the table, there are navigation controls (back, forward, search, refresh) and a 'Person Search' button highlighted with a red box. At the bottom, there are 'Choose' and 'Cancel' buttons.

TFACTS Storyboard • Document Storage- Associating Documents to Multiple Persons

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

Person Search Results
Result(s) 1 - 50 of 250

[AD]-Adopted, [D]-Duplicate, [E]-Employee, [EP]-Employee-Previous, [HE]-Hazard-Environment, [HR]-High Risk, [HS]-Hazard-Safety, [SP]-Substantiated Perpetrator, [TSI]-Potential TBI Sex Offender Match
[RA]-Asian, [BA]-Black/African American, [RI]-American Indian/Alaska Native, [RH]-Native Hawaiian/Other Pacific Islander, [RM]-Multi-Racial-One Race Unknown, [RU]-Unable to Determine, [RW]-White

Person ID	Name	Address	Gender	DOB	SSN
<input type="checkbox"/> <input type="button" value="Choose"/>	PID: 3184 ESD: 21464316 USD: e08485 Baker, Laurie [E]				
<input type="checkbox"/> <input type="button" value="Choose"/>	PID: 4 ESD: 4 Baker, Laurie [EP]		Female		
<input type="checkbox"/> <input type="button" value="Choose"/>	PID: 2311652 ESD: 2311652 Baker, Laurie Ann [RI]	1141 WINDSOR CIR, LYLES, TN 37098 (map) #931-870-6294	Female	07/06/1963 Age: 55	XXX-XX-0782
<input type="checkbox"/> <input type="button" value="Choose"/>	PID: 314772 ESD: 314772 DOL-Baker, Laurie [EP]		Female		
<input type="checkbox"/> <input type="button" value="Choose"/>	PID: 314766 ESD: 314766 BAST-Baker, Laurie [EP]		Female		
<input type="checkbox"/> <input type="button" value="Choose"/>	PID: 314730 ESD: 314730 HARR-Baker, Laurie [EP]		Female		
<input type="checkbox"/> <input type="button" value="Choose"/>	PID: 314742 ESD: 314742 KNOW-Baker, Laurie [EP]		Female		
<input type="checkbox"/> <input type="button" value="Choose"/>	PID: 314760 ESD: 314760 MC-Baker, Laurie [EP]		Female		
<input type="checkbox"/> <input type="button" value="Choose"/>	PID: 314748 ESD: 314748 NE-Baker, Laurie [EP]		Female		
<input type="checkbox"/> <input type="button" value="Choose"/>	PID: 314784 ESD: 314784 NW-Baker, Laurie [EP]		Female		

- 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**.

Select Other Persons

From Event
Event Date:
Event Status:
Event Name:

Event Search

Associated Persons

Person ID	Full Name	DOB	Age	Association
3184	Baker, Laurie		0	
58540982	Musk, Jovan	07/12/2009	9	Cousin
58543109	Noir, Drakkar	11/15/1982	35	Birth Father
58543128	Spice, Old	12/07/1946	71	Grandparent
58544098	Gabanna, Dolce	10/18/1983	35	Birth Mother

10 items per page 1 - 5 of 5 items

Person Search

HOME | HELP & TRAINING | PRIVACY & SECURITY | /administration/document/documents_personAssociation.jsp @PK_03_documents_person_association 5/7/1 version 10-26-2018 12:08 PM

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

Person Header

Name: Chanel, Fragrance
Person ID: 58537984
Gender: Female
SSN:
DOB: 07/12/2005
Age: 13 Yrs

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

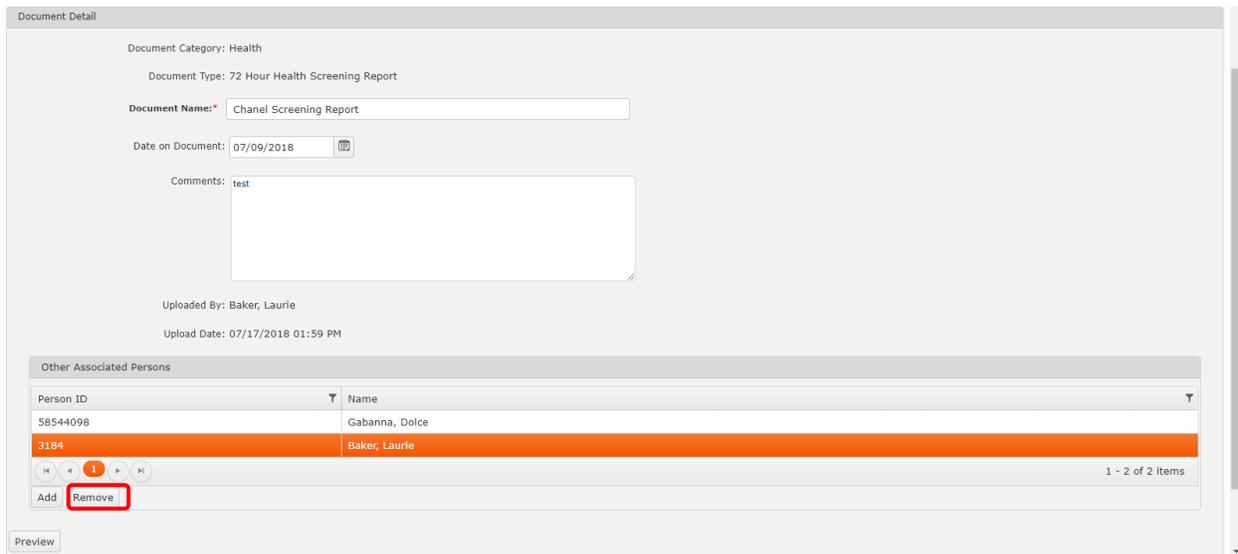
Preview

HOME | HELP & TRAINING | PRIVACY & SECURITY | /administration/document/document_detail.jsp @PK_03_documents_detail_person 5/7/1 version 10-26-2018 12:08 PM

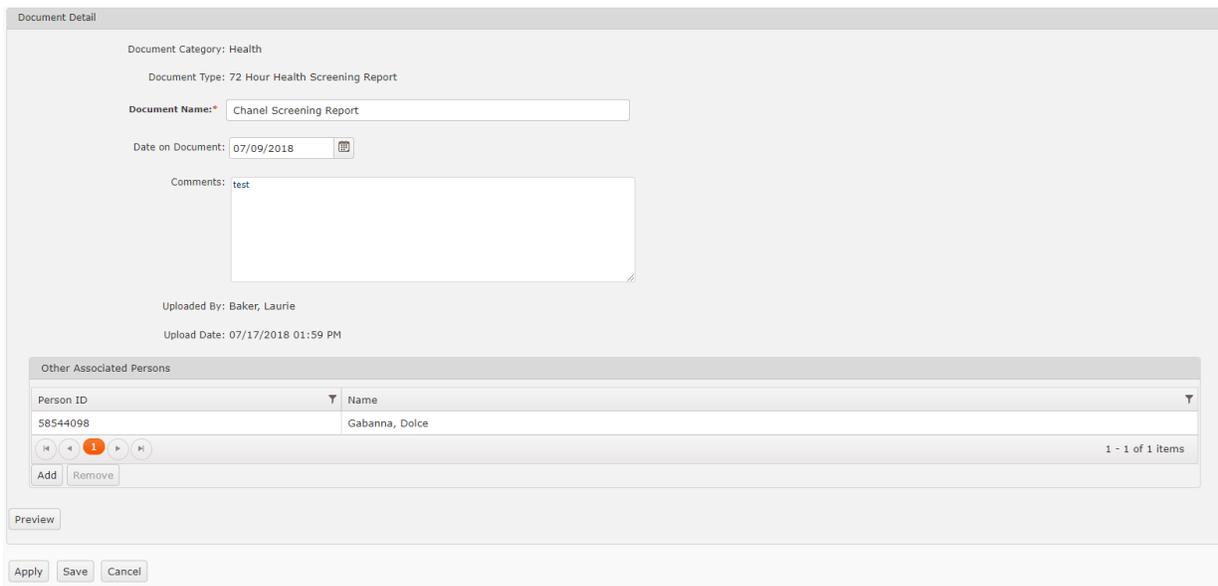
Remove a Document Association from a Person

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**.



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



You have completed this storyboard.