

Uploading Site Reports and other files into Presspoint:

- 1) Log into Presspoint
- 2) Use "Last name like" report to run a search for the program participant's last name
- 3) Once you've found the participant click onto "View" to go into their record
- 4) Click on the "History" tab
- 5) Find the "Actions" button in the top right hand corner (look for the lightning bolt)
- 6) Select "Private file" from the drop down menu, which should bring up a form
- 7) In this form select "Choose file," find the site report saved to your desktop or local drive, and import
- 8) Enter a name for the site report in the "Title" box using this format:
LastNameFirstInitial_SiteReport_Date_TechInitials. Example: PickardA_SiteReport_8-7-2017_SP.
(Please note the use of underscore instead of spaces.)
- 9) Hit "Save" button

If the program participant reaches certification at their first assessment you'll also want to upload their photo and the FB blurb into their record (as two separate files). It's a very similar process. You will also import those into the History tab as a Private file. The name format for the photo is "LastNameFirstInitial_CertLevel_MonthYear". Example: PickardA_GoldCertification_August2017. The name format for the FB blurb is "Certification Note." To get the FB blurb and photo posted onto FB just email them to JP and copy me.

See the Naming Convention doc for lists of other things that you would want to create a new file for in the History tab. Please look it over so you know what other kinds of notes need to be made.