




ASSET Technical Bulletin

Document Management Project Updates – To be Deployed on August 30, 2023

Improvements to the Documents Grid:















- Documents are now sorted in descending order of Updated/Modified Date by default
- Can see if a document is marked confidential from the grid 
- Can download a document directly from the grid 
- Can delete a document directly from the grid 
 - able to delete documents user has uploaded without a time restraint if no other Career Planners have tagged the document with a Program and Purpose
- Option to modify the number of documents displayed on the grid Page Size 10 ▼

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Customer Documents

Add Document

Current Documents

Document Type	Document Name	Uploaded/Modified Date	Uploaded/Modified By	Action
DOB Proof	LGOJTCContractsigned.pdf	2/14/2023 9:14:11 AM	ACCOUNTS\IPOWERXAWQ	Details  
DOB Proof	LGOJTCContractsigned.pdf	2/14/2023 9:13:05 AM	ACCOUNTS\IPOWERXAWQ	Details  
Class Schedule	test2.pdf	2/13/2023 3:52:00 PM	ACCOUNTS\IPOWERXAWQ	Details  
Eligibility Review Questionnaire	Web1 4.3 - Basic Report Development.doc 	2/13/2023 1:44:07 PM	ACCOUNTS\IPOWERXAWQ	Details  
Confidential	Confidential	1/26/2023 11:36:20 AM	ACCOUNTS\IPOWERXAWQ	Details  
Attendance Verification	sample.docx 	1/24/2023 3:38:37 PM	ACCOUNTS\IPOWERXAWQ	Details  

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6 document(s) found.

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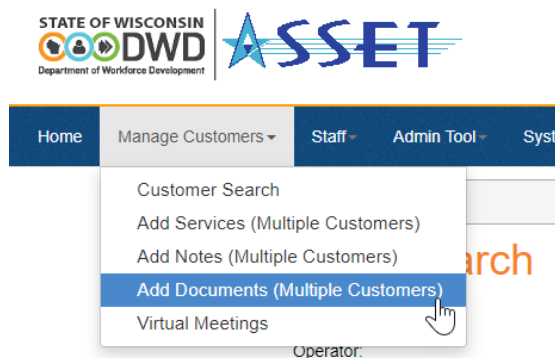
Improvements to Document Upload Screen

Several changes were made to streamline the upload process for staff:

- Duplicate dropdown choices were removed
- Can add multiple documents for the same document type, program and purpose at once
- Allows a larger 20MB size and 10-count limit
- Prevents duplicate uploads of the same document

Upload document to multiple customers at the same time

Choose **Add Documents (Multiple Customers)** from the Manage Customers dropdown:



Search for the customers you wish to send the document to, select your customers by checking the checkbox next to the PIN:

Customer Multi Search - Documents

* Career Planner: Powell, Rebecca
Program/Program Area: Title 1 Adult
Program Status: ☒ Open ☐ Exited

[Get List](#)

[Select All](#) (50 max) [Clear All](#) [Add Document to Selected Customers](#)

Search Results:

	PIN	Assignment	Name	Intake Date	Reg or Begin Date	Exit Date
<input checked="" type="checkbox"/>	26633	★	BUCKYINGHAM, TEST	11/18/2021	12/30/2021	
<input checked="" type="checkbox"/>	33566	★	COOL, JOE	03/21/2023	03/21/2023	
<input checked="" type="checkbox"/>	25172	★	DARTON, POLLY	06/05/2018	06/20/2022	
<input type="checkbox"/>	27413	★	DELETETEST, VIJAY	02/02/2022	02/02/2022	
<input type="checkbox"/>	29666	★	DEPP, JOHNNY	09/29/2022	03/27/2023	

Once PINs are selected click **Add Document to Selected Customers** and upload your document as usual. A copy will be uploaded to each PIN.

Upload Documents from Services

Functionality has been added for Career Planners to upload documents from within their service entry workflow for some services in the Title 1 Title 1 Adult/Dislocated/Youth, TAA, Title 3 and JVSG programs. Wherever possible data is defaulted so that it does not need to be entered by the Career Planner.

Fixes to Document Confidentiality

- Career Planner is able to see confidential documents for PINs that have been transferred to them
- Corrected the "Updated/Modified By" information displayed on cases that had been transferred