FILE ATTACHMENT WALKTHROUGH FOR SERVICEPOINT v.4.06.048

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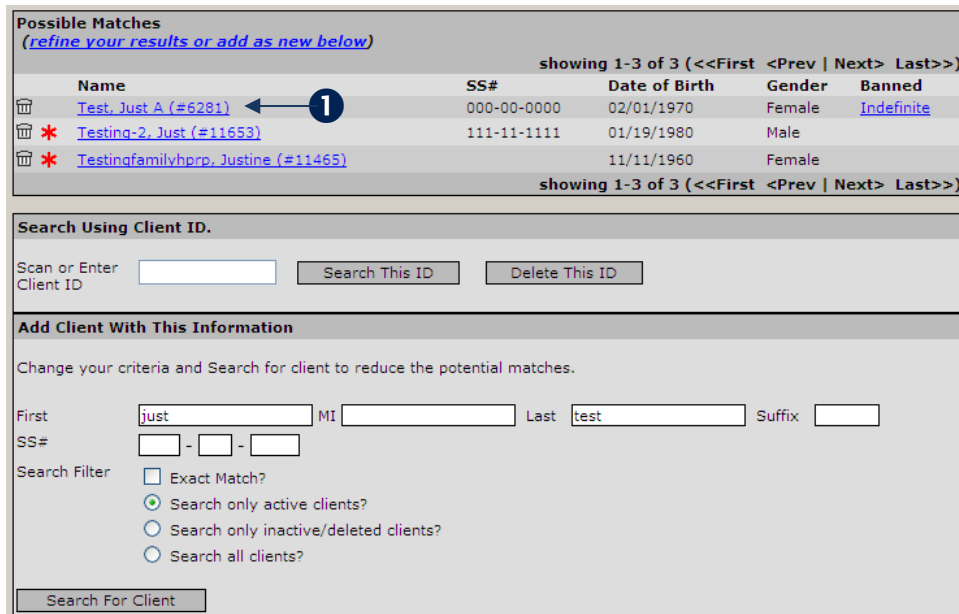
SERVICEPOINT WORKFLOW

Bowman Systems recommends the following workflow in order add, edit, and delete file attachments into our ServicePoint database. This workflow was completed using an Internet Explorer web browser, version 7 on Windows XP Service Pack 3 operating system. There may be add-ons or security settings within your internet options that will prevent the options seen in this workflow. If you're having difficulty with these options, see your system administrator or technical support office for assistance.

CLIENT ARRIVAL

- Click on **ClientPoint**.

- Search the database for possible matches. If the client already has an existing record in **ServicePoint**, click on the client's name (a blue hyperlink) to access the record. If the search results yield no adequate matches, add the client as new. (See Figure 1-1 ❶)

Figure 1-1

- The **Profile** tab of the **Client's** record will load and the **Client ID** will display (#). (See Figure 1-2 ❶)
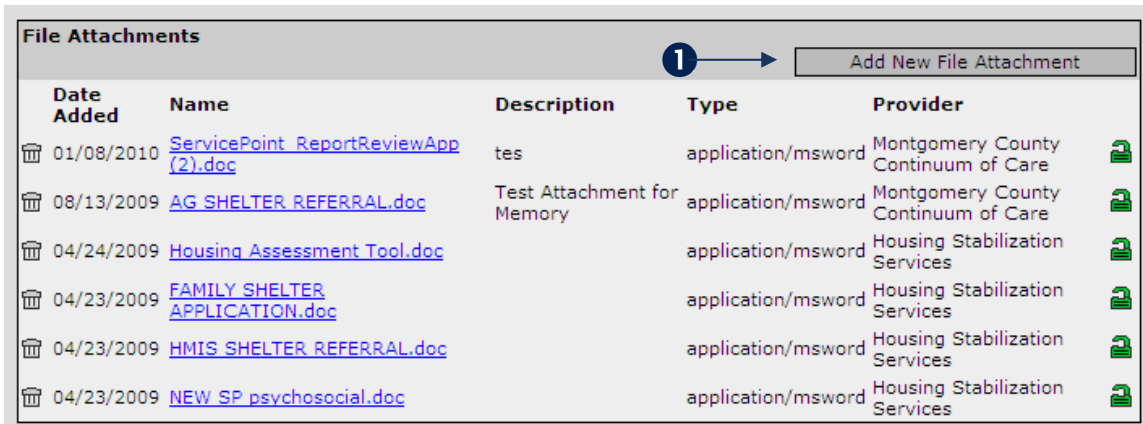
Figure 1-2

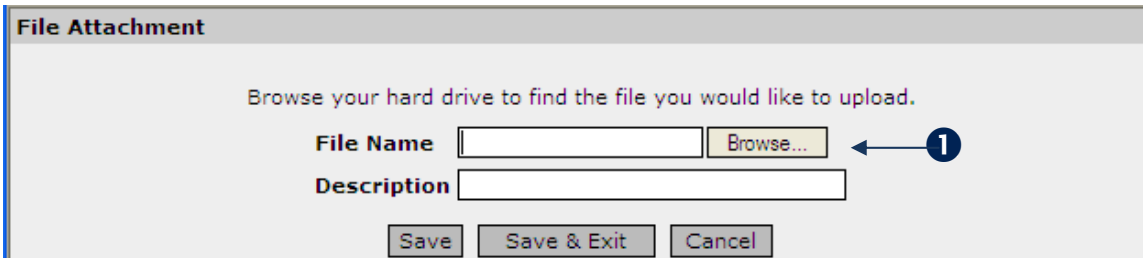| IMPORTANT |
|---|
| If "Don't Know" or "Refused" are selected as the Housing Status response, **the client will not be reported** in the HPRP reports. |

ADDING ATTACHMENTS

- Click on the **Add New File Attachment** button located on the **Client's Profile** in **ClientPoint**. (See Figure 2-1 ❶)

Figure 2-1

- A new window will display. (See Figure 2-2)

Figure 2-2

- Click on the **Browse** ❶ button to browse your computer for the file to upload to the **Client's** record in **ServicePoint**.

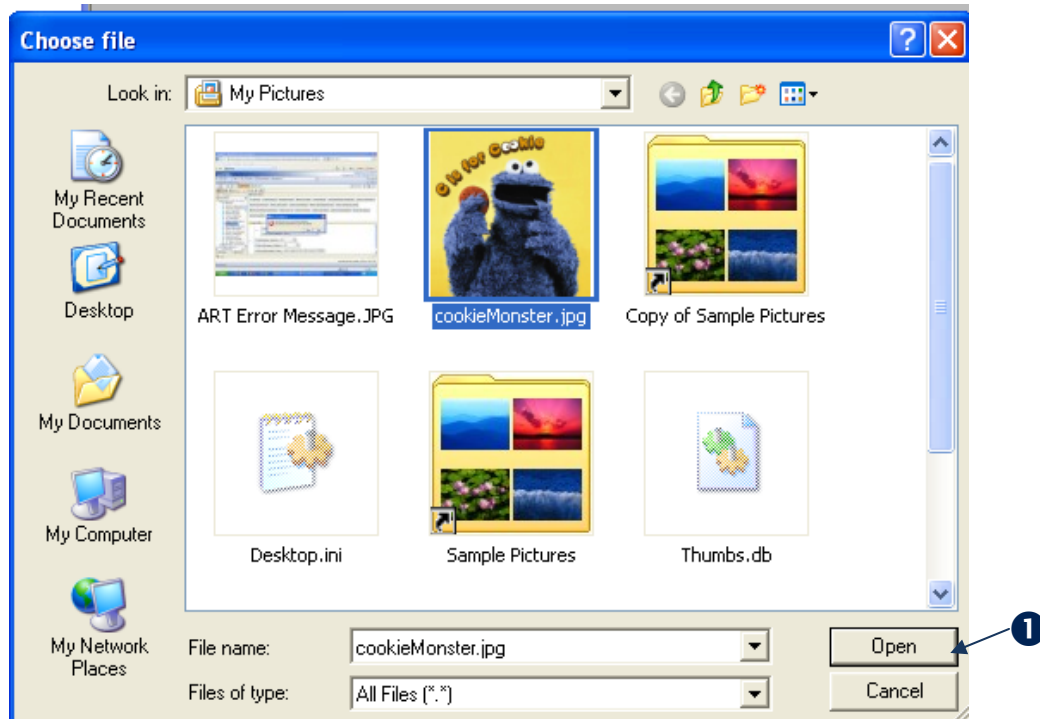- Choose your file and click **Open**. (See Figure 2-3 ❶)

Figure 2-3

- The Choose File window will close, and the file will be listed in the File Name field. (See Figure 2-4 ❶)
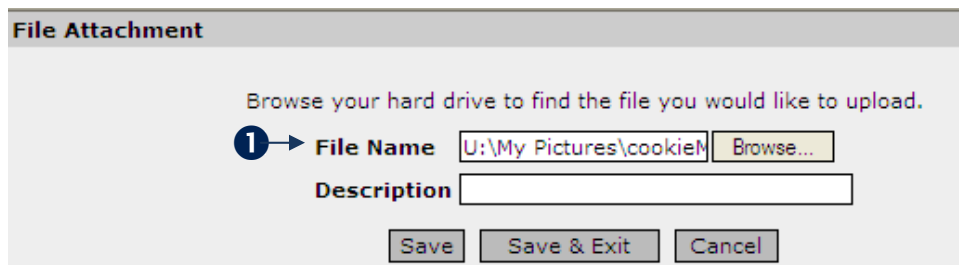

Figure 2-4

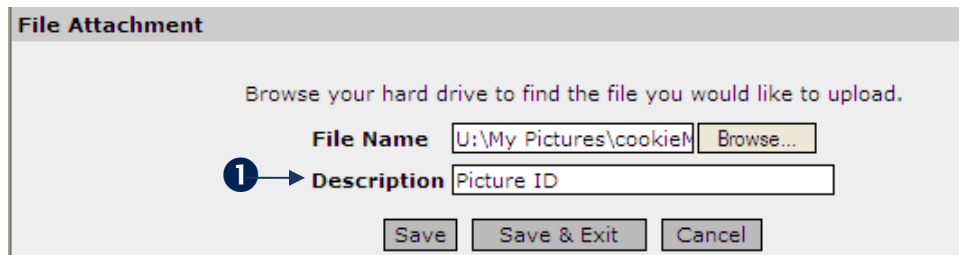- Give your file a Description (optional) and click **Save & Exit.** (See Figure 2-5 ❶)

Figure 2-5

- You will now see your file attachment listed. (See Figure 2-6 ❶)


Figure 2-6

MODIFYING AND DELETING ATTACHMENTS

- Click on the blue hyperlink of the name of the file you wish to modify. This will be located under the **File Attachment** section in **ClientPoint**. (See Figure 3-1 ❶)

Figure 3-1

- A pop-up window will display asking you if you want to **Open**, **Save**, or **Cancel**. Select **Save**. (See Figure 3-2 ❶)


Figure 3-2
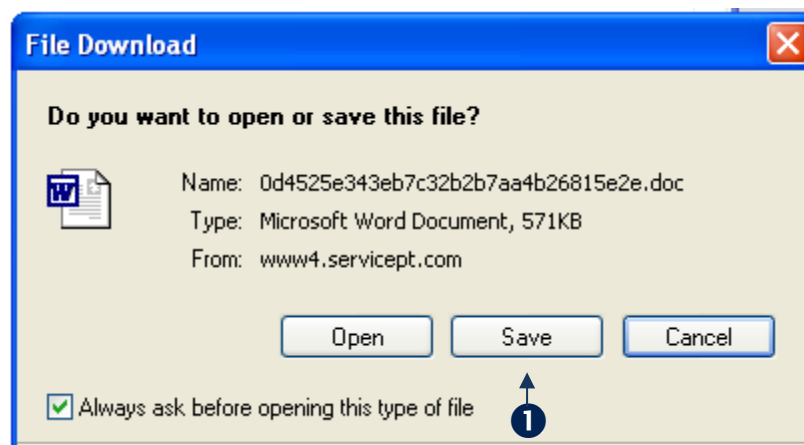
IMPORTANT
If you do not get a pop up window, the document will not be able to be saved correctly. If you select "Open", it will open in the Browser and any changes will not be saved.

- A new window will display. Rename your file❶ and click **Save**❷ to save it to a location on your computer. (See Figure 3-3)

Figure 3-3

IMPORTANT
Remember where you saved your file as you will need to upload it back onto ServicePoint.

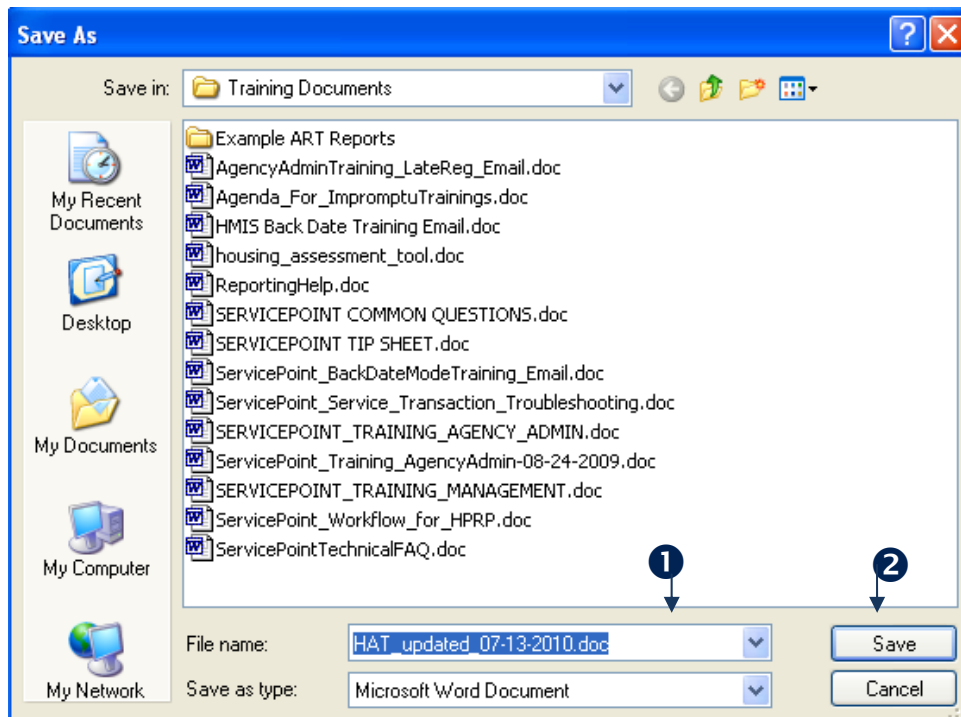- Once the file is finished downloading to your computer, click on the **Open** button. (See Figure 3-4 ❶)
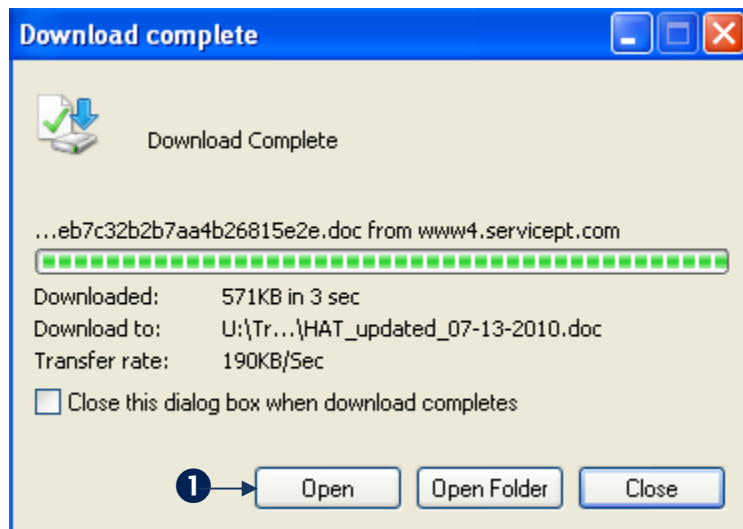

Figure 3-4

- After clicking **Open**, the file will open on your local computer and you will be able to successfully edit and save the document. At this point the file is saved on your computer and not on **ServicePoint**.

- After making your edits, you need to upload the new version onto the **Client** record in **ServicePoint**, and delete the older file.

- Follow the steps mentioned in "**Adding Attachments**" to add the updated file to **ServicePoint**.

- Once your updated file has been successfully attached to the record, click on the trashcan icon of the old file you wish to delete. (See Figure 3-5 ❶)

Figure 3-5

- A warning window displays. Click the **OK** button. (See Figure 3-6 ❶)

Windows Internet Explorer

Are you sure you want to delete this file attachment?
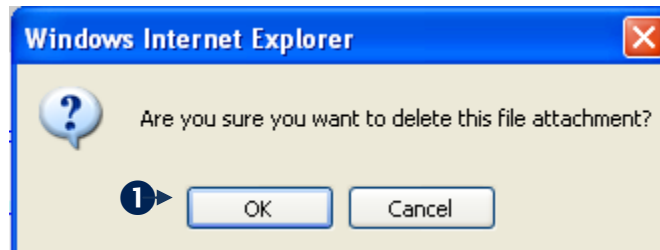
❶►   OK   Cancel

Figure 3-6

- The file will be removed from the **Client** record. (See Figure 3-7)

File Attachments

Add New File Attachment

Date Added	Name	Description	Type	Provider	
🗑 07/13/2010	HAT_updated_07-13-2010.doc	Updating Housing Assessment Tool	application/msword	Montgomery County Continuum of Care	📑
🗑 07/13/2010	cookieMonster.jpg	Picture ID	image/pjpeg	Montgomery County Continuum of Care	📑

Figure 3-7

- You have successfully updated an attachment in ServicePoint.

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