

Instance Level Attachments Report

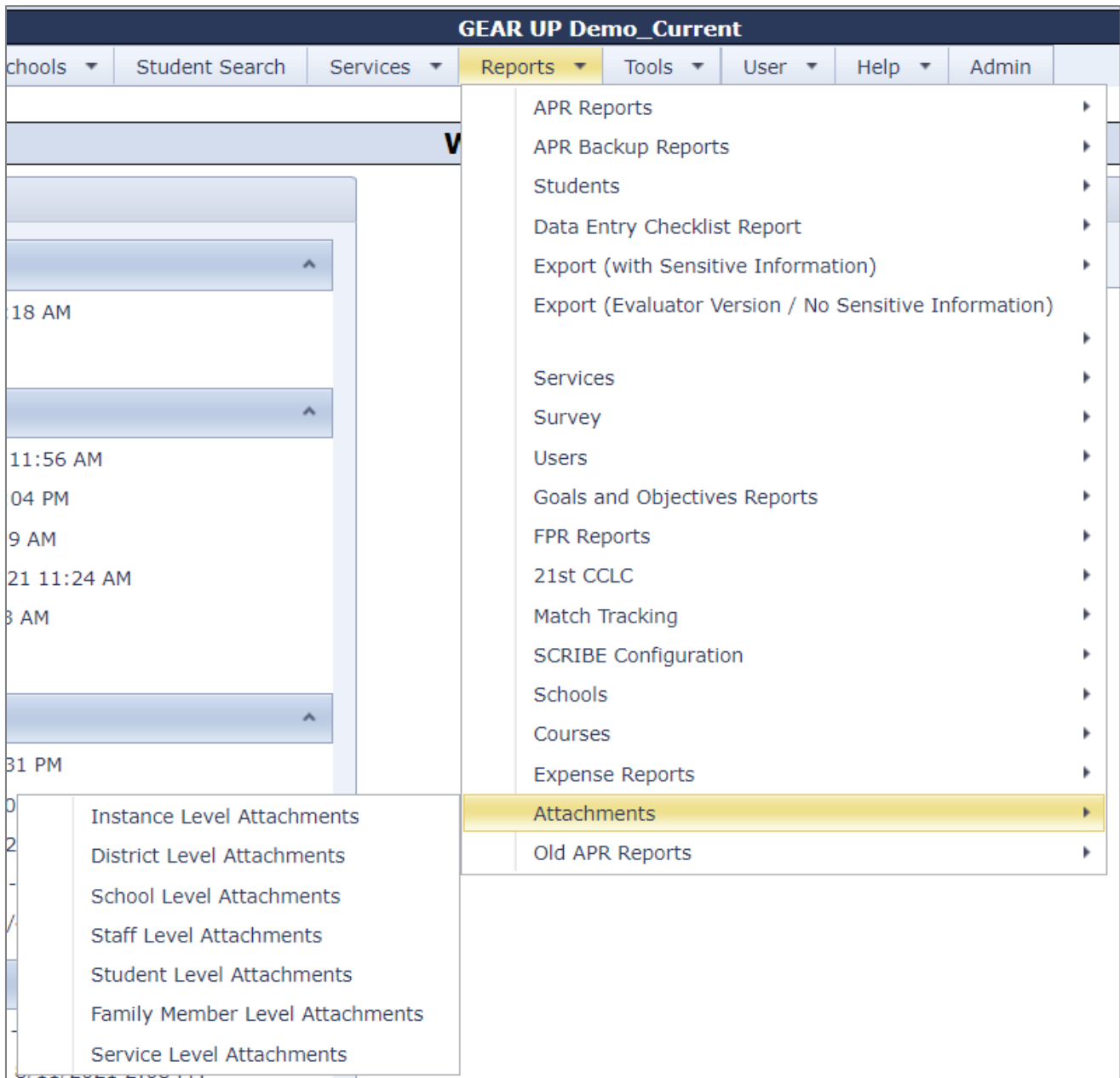
This tutorial details the instance-level attachments report. For more information on the other levels of attachments reports, go to the [Attachment Reports folder](#) in the Help Desk.

There are several new reports in SCRIBE that list attachment details like attachment name, file type and tags for the seven different levels at which you can attach documents. These new reports are an easy way to see where attachments have been uploaded, when, and what types of documents they are.

Instance Level Attachments Report

All attachment reports are in SCRIBE under the Reports tab. If you do not see the Attachment option, submit a [Help Desk ticket](#) so they can be added to your SCRIBE instance.

1. In SCRIBE, click **Reports > Attachments > Instance Level Attachments**



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2. All of the report filters are optional. If you leave all of the filters unselected, you will receive a report that lists all of the instance-level attachments and their details.

SCRIBE Home > Instance Level Attachments

Instance Level Attachments

Report Filters

Attachment Date: Custom ▾
▾ To ▾

Attachment Types:
☐ Select All
☐ .csv ☐ .doc ☐ .docx ☐ .gif ☐ .jpg ☐ .pdf ☐ .png
☐ .rtf ☐ .txt ☐ .xls ☐ .xlsb ☐ .xlsx

Attachment Tags:
☐ Select All

<input type="checkbox"/> Attendance Record	<input type="checkbox"/> Backup Documentation	<input type="checkbox"/> College Acceptance Letter
<input type="checkbox"/> College Application	<input type="checkbox"/> Counselor Notes	<input type="checkbox"/> Course Related Documentation
<input type="checkbox"/> Event/Service Documentation	<input type="checkbox"/> Food/Dining	<input type="checkbox"/> From Parents
<input type="checkbox"/> Health Related Documentation	<input type="checkbox"/> Hospitality	<input type="checkbox"/> Invoice
<input type="checkbox"/> Matching	<input type="checkbox"/> Parent Submitted Documentation	<input type="checkbox"/> Permission Form
<input type="checkbox"/> Photo	<input type="checkbox"/> Resume	<input type="checkbox"/> Sign-in Sheet
<input type="checkbox"/> Standardized Test Results	<input type="checkbox"/> Student Release Form	<input type="checkbox"/> Survey
<input type="checkbox"/> To Parents	<input type="checkbox"/> Transcript/Report Card	<input type="checkbox"/> Transportation

Programs:
☐ Select All
☐ EIP ☐ GEAR UP ☐ Talent Search
☐ Upward Bound

Uploaded By: --- Select One --- ▾

Report Format: * ☒ EXCEL ☐ PDF

Generate Report

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3. Narrow the list of attachments on the report by using any/all of the filter options:
 - a. **Attachment Date:** Select **Custom** from the dropdown menu and enter a custom date range. Only attachments that were attached at the instance-level between the date range will be displayed on the report.

Select **Month** from the dropdown menu. Then select the month and year from the dropdown menus that will appear. Only attachments that were attached at the instance-level during the month selected will be displayed on the report.

If no Attachment Date is specified, the report will display all attachments that have ever been attached to instance-level attachments.

- b. **Attachment Types:** Select which type(s) of files you would like displayed on the report.

If no Attachment Type is specified, the report will display all attachment types that have been attached to instance-level attachments.

- c. **Attachment Tags:** Any instance-level attachments that have been tagged with the selected tags will be displayed on the report. Tags are added when the file is uploaded to instance-level attachments. You can check the tag boxes any time after the attachment is uploaded by editing the attachment. Find additional information about tags in [Attachments](#) on the Help Desk.

If no Attachment Tag is specified, the report will display all attachments that have been attached to instance-level attachments, whether they have tags or not.

- d. **Programs:** Any instance-level attachments that have been associated with the selected Program(s) will be displayed on the report. You can associate an attachment with the program when the file is uploaded to instance-level attachments. You can associate the file to a program any time after the attachment is uploaded by editing the attachment. Find additional information about programs in [Attachments](#) on the Help Desk.

Note: The Programs filter is specific to whether the attachment has been associated with any program. This does not have anything to do with whether students or staff are associated with any programs.

If no Program is specified, the report will display all attachments that have been attached to instance-level attachments, whether they are associated with a program or not.

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- e. **Uploaded By:** Select a person from the dropdown menu. Only attachments that were attached at the instance-level by that person will be displayed on the report.

If no Uploaded By person is specified, the report will display all attachment types that have been attached to instance-level attachments.

- f. **Report Format:** Select EXCEL or PDF. Best practice is to run the report as an **Excel** file (spreadsheet) so you can sort, filter, rearrange, and otherwise manipulate the report if desired, whereas a PDF is a fixed file that cannot be edited.

4. Click **Generate Report**.

	A	B	C	D	E	F	G
1	Instance Level Attachments						
2	Instance Name: GEAR UP Demo_Current						
8	Attachment Name	File Name	File Extension	Date Uploaded	Uploaded By	Program(s)	Tag(s)
9	2019_Semester1grades_Bayside	2019_Semester1grades_Bayside	.xlsx	12/3/2019	Allie Sheldon	GEAR UP	
10	GEAR UP Contract for parents	GEAR UP Contract for parents	.pdf	6/3/2020	Allie Sheldon		To Parents, Backup Documentation
11	Attendance for staff PD	Attendance for staff PD	.csv	9/12/2021	Allie Sheldon		Attendance Record

Additional resources

[Attachments](#) – a detailed PDF for how to access all 7 types of attachments and other notes on naming, sorting, permissions

[Town Hall from 6/5/2020 where attendees discussed attachments – recording, slides and notes](#)