

Uploading a PDF for the Plan Summary Report

Uploading a PDF is only to be used with plan summaries. When uploading a PDF there is a size limitation of 2MB. It is better to save a file as a PDF versus scanning something in and saving it as a PDF because a scanned file is bigger in size. Below are the steps to follow to create a plan summary task and then upload a PDF.

Step 1: Go to your Originator plans list.

Step 2: Click on the Manage Task Icon

TEAS Extension Accountability System

Home My TEXAS Plans Retrievals Admin Help & Contact

Plans Navigation You are here: Plans >

Add New Plans:

- Custom
- From Model
- From Existing

View / Edit:

- Originator (7)
- Team Member (0)
- Close Plans

Percent Time:

Originator (43%)
Team Member (0%)

Manage: Originator Plans

| Title [ID] | Percent Time | Edit | Manage Tasks | Delete | Plan Status |
|--|--------------|------|--------------|--------|-------------|
| 1 2008 Org. Dev.- Building Connections [180333] | 4 % | | | | |
| 2 2008 West Region Sheep and Goat Production Plan [180435] | 25 % | | | | |
| 3 2009 Org. Dev.- Building Connections [180334] | 4 % | | | | |
| 4 Ind Devo Example [180546] | 0 % | | | | |

Step 3: At the top right, look for the Add New Task icon.

Home My TEXAS Plans Retrievals Admin Help & Contact

Plans Navigation You are here: Plans > Manage: Originator Plans >

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- Close Plans

Percent Time:

Originator (43%)
Team Member (0%)

Manage: Tasks

Clicking the Delete button will immediately delete the task.

| # | Title [ID] <i>Lead Tasks are Bold</i> | Date | Edit or View | Delete |
|---|---------------------------------------|------------|--------------|--------|
| 1 | 123456789 [579150] | 11/15/2008 | | |

Step 4: Title the task, select Interpretation as your task type, and assign the task to yourself.

Home My TEXAS Plans Retrievals Admin Help & Contact

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Percent Time:

Originator (43%)
Team Member (0%)

Add: Task to Plan - 2008 West Region Sheep and Goat Production Plan [180435]

| | |
|------------|---|
| Task Title | <input type="text" value="Summarize & Close"/> |
| Type | <ul style="list-style-type: none"><input type="radio"/> Planning Groups<input type="radio"/> Marketing/Promotion<input type="radio"/> Educational Methods<input type="radio"/> Evaluation<input checked="" type="radio"/> Interpretation<input type="radio"/> Individual Development<input type="radio"/> Resource Acquisition/Management |
| Lead | <input checked="" type="radio"/> Megan N. Wright (Plan Originator) |

Add Task

Step 5: Date the task, select Summarize Plan as your Interpretation type and hit the Save button.

You are here: [Plans](#) > Manage: Originator Plans

2008 West Region Sheep and Goat Production Plan [180435] >

Edit Task: Summarize & Close [779710]

The following fields must be completed:

- Type of interpretation event
- Date of meeting

Save

INITIAL VALUES

| | |
|---------------|---|
| Plan [ID] | 2008 West Region Sheep and Goat Production Plan[180435] |
| Task ID# | 779710 |
| Title | Summarize & Close |
| Type | Interpretation |
| Assigned To | Megan N. Wright [60014] |
| Last Modified | 10/27/2008 |

REQUIRED

| | |
|---------------------|---|
| Task Date | This date should occur BETWEEN the PLAN's date range : May 1, 2008 to Oct 31, 2008 10/31/2008 |
| Interpretation Type | <input type="radio"/> Group Interpretation <input type="radio"/> One-on-One <input type="radio"/> Mass Media <input checked="" type="radio"/> Summarize Plan |

Other Personnel

Step 6: Go to the My TEXAS tab and select Summary from the navigation (yellow arrow). Then click on the Add Report icon (red arrow).

My TEXAS Navigation

To Do List:

- Originator Plans(7)
- Team Plans (0)
- Summary (1)
- Unscheduled (0)
- Report an Unplanned Task



Completed Reports:

- Originator (0)
- Team Member (0)

My TEXAS: Plan Summary Tasks

< October 2008 >

Clicking on the Delete button will immediately delete the report.

| # | Title | Date Occur | |
|---|----------------------------|------------|---|
| 1 | Summarize & Close [779710] | 10/31/2008 |   |

Step 7: Click on 'Upload a PDF.'

Reports

Summarize & Close [779710]

Please choose:

- Provide a Narrative
- Upload a PDF

Step 8: Click on 'Browse' (yellow arrow). Once you have selected the file you would like, click on 'Upload PDF' (red arrow).

The screenshot shows the 'My TEXAS' navigation menu with 'Reports' selected. The 'Initial Values' table contains the following data:

| Initial Values: | |
|---|---|
| Plan [ID]: | 2008 West Region Sheep and Goat Production Plan [180435] |
| Task [ID]: | Summarize & Close [779710] |
| Report [ID]: | Plan Summary Report [6337] |
| EDU Method Type: | Interpretation |
| Task Date: | 10/31/2008 |
| Upload a PDF | <input type="text"/> <input type="button" value="Browse..."/> |
| <input type="button" value="Upload PDF"/> | |

Once you have uploaded a PDF you can view it by clicking on it (link circled in red).

****NOTE: The file name is changed from your original name for ease of retrieval once in the system.****

You are also able to change the file uploaded by repeating step 8 above. Once this step is repeated the original document uploaded is replaced by the new document.

The screenshot shows the 'My TEXAS' navigation menu with 'Reports' selected. The 'Initial Values' table contains the following data:

| Initial Values: | |
|---|---|
| Plan [ID]: | 2008 West Region Sheep and Goat Production Plan [180435] |
| Task [ID]: | Summarize & Close [779710] |
| Report [ID]: | Plan Summary Report [6337] |
| EDU Method Type: | Interpretation |
| Task Date: | 10/31/2008 |
| Current PDF on File: | 180540_10201.pdf |
| Required | |
| Select your pdf document from your computer | <input type="text"/> <input type="button" value="Browse..."/> |
| <input type="button" value="Upload PDF"/> | |