

ECATS PaperClip Usage Monitoring



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Document Purpose

The purpose of this document is to show how to run standard reports to monitor your LEA's PaperClip usage and to view details regarding documents uploaded by users to student records. The LEA Administrator 4 user type has permission to create the PaperClip Usage report. The General Education Administrator, LEA Administrator 1, LEA Administrator 2, LEA Administrator 3, LEA Administrator 4, and the LEA Data Manager user types have permission to create the PaperClip Details (xls) report.

What is PaperClip?

PaperClip allows ECATS users to attach a file currently on their computer to the system by accessing the student record in ECATS then choosing to browse for a file to attach and then uploading it. PaperClip is for uploading external documentation, such as IEP signature pages, to ECATS.

PaperClip Annual Allocation

The LEA-specific annual data (bytes) allocation is calculated using ADM (general education students + EC students). Thresholds are also in place to establish minimum and maximum annual allocations. Each LEA's allocation will reset at the start of each school year (July).

The minimum allocation an LEA may receive based on their ADM is 100 MB (104,857,600 bytes); the maximum allocation an LEA may receive is 23,000 MB (24,117,248,000 bytes)

LEAs may request their specific annual allocation by submitting a Zendesk ticket.

For reference:

- 1 MB is equal to 1,048,576 bytes
- The average file size of a document uploaded to ECATS was 188,744 bytes (0.18MB) for 2021-2022.
- This PaperClip Usage Monitoring document is 357,884 bytes (0.34 MB)

Frequently Asked Questions

Which documents are required to upload to a student's record in ECATS?

NC DPI **only requires three (3) documents** to be uploaded to a student's record in ECATS:

1. Signed Initial Consent for Evaluation
2. Signed Consent for Services
3. Signed Medicaid Consent

Uploading just the signature page will suffice, unless something differs on the signed version than the document that is finalized in ECATS.

How can users check what their LEA's usage and overall allocation is?

Users with permission to access the System Info page can view their LEA's current usage and overall allocation. Navigate to Admin > School System > System Info. Scroll to "Uploaded

Documents Quota (in bytes)” (overall allocation) and “Bytes Uploaded this Year” (current usage). A percentage of usage is provided for reference.

Can users delete documents to “free up space” on their LEA site?

Yes, as of April 2023, users can delete documents to reduce PaperClip usage on their site. Only certain individual users have permission to delete documents. Contact DPI for a list of ECATS Corrections Managers. There are typically 1-3 per LEA.

If a student transfers to another LEA, do their documents contribute to the receiving LEA’s usage?

The receiving LEA will not be charged for documents uploaded by the student’s previous LEA.

How can LEA Administrators monitor the size and content of uploaded documents?

See the sections below on “PaperClip Usage Report” and PaperClip Details Report” for details.

How can users use less PaperClip storage when uploading documents?

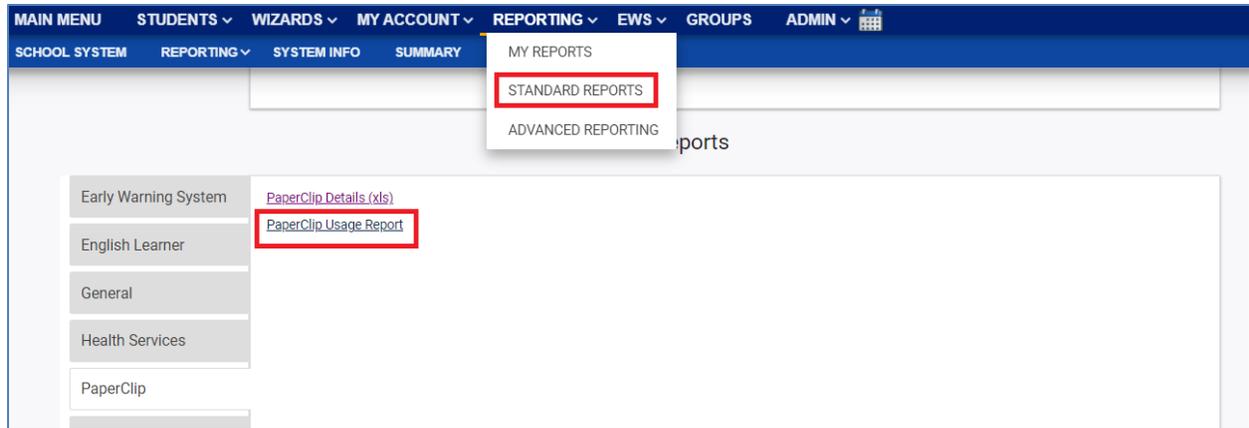
See the section below on “Tips for Uploading Documents with PaperClip”.

Tips for Uploading Documents with PaperClip

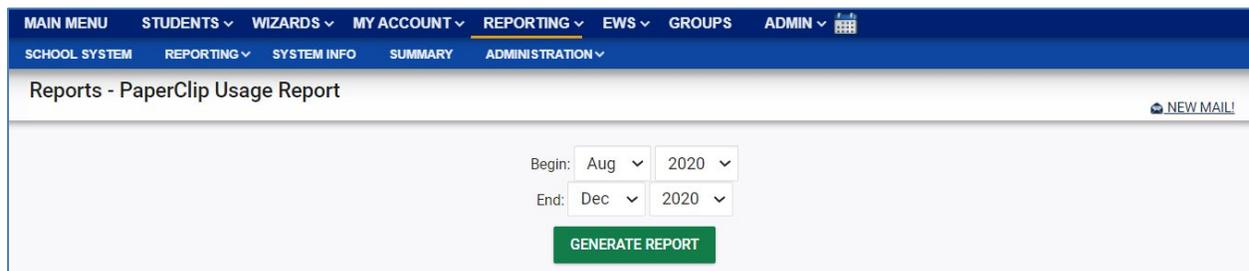
1. Be mindful of the file type you upload (look for the file extension at the end of the file name, e.g. ‘.pdf’ or ‘.jpg’).
 - Image files (jpg, png, tif) can be large
 - Upload document (pdf or docx) instead of rich text (rtf) files
2. Adding images, graphs, charts, or complex text formatting will significantly increase your file size (even for Microsoft Word or Adobe PDF files).
3. Use “Save as PDF” instead of “Microsoft Print to PDF” to conserve file size when converting from Word to PDF.
4. Search online for instructions and tips how to compress or reduce the file size of large files.

PaperClip Usage Report

The PaperClip Usage Report provides a monthly breakdown of PaperClip usage in bytes uploaded per month. This report is accessed via the ‘Reporting’ tab on the Main Menu, using the ‘Standard Reports’ dropdown option. The report is found by selecting the ‘PaperClip’ standard reporting category as shown in the screenshot below:



When the PaperClip Usage Report is selected, the user will be prompted to select a date range for the report. The report will return totals by month for the date range entered, which will allow the user to review a current month's usage or to identify trends in usage over several months. Enter the desired date range and click 'Generate Report':



When the report has finished running, it will be available under 'Saved System Reports' on the 'Standard Reports' page via the 'Reporting' dropdown as shown in the screenshot below:

The screenshot shows a web application interface with a navigation bar at the top containing 'MAIN MENU', 'STUDENTS', 'WIZARDS', 'MY ACCOUNT', 'REPORTING', 'EWS', 'GROUPS', and 'ADMIN'. Below the navigation bar, there are tabs for 'SCHOOL SYSTEM', 'REPORTING', 'SYSTEM INFO', and 'SUMMARY'. A dropdown menu for 'REPORTING' is open, showing 'MY REPORTS', 'STANDARD REPORTS' (highlighted with a red box), and 'ADVANCED REPORTING'. The main content area is titled 'Reports' and contains a list of report categories on the left and a list of reports on the right. The categories include 'Early Warning System', 'English Learner', 'General', 'Health Services', 'PaperClip', 'Progress Track', 'Service Logging', and 'Special Education'. The reports listed include 'Compliance by IEP Coordinator', 'Duplicate Document Report (xls)', 'Duplicate Student Report (xls)', 'NCECATS Accommodations Report School/Test', 'NCECATS ServicesReport', 'PCGX-YYYYMMDDhhmmss-00-1546-ECSPR-PS_ECDataOLTP', 'Students Missing Data (xls)', and 'Duplicate Students Report (LEA)'. Below this is a section titled 'Saved System Reports' with a table:

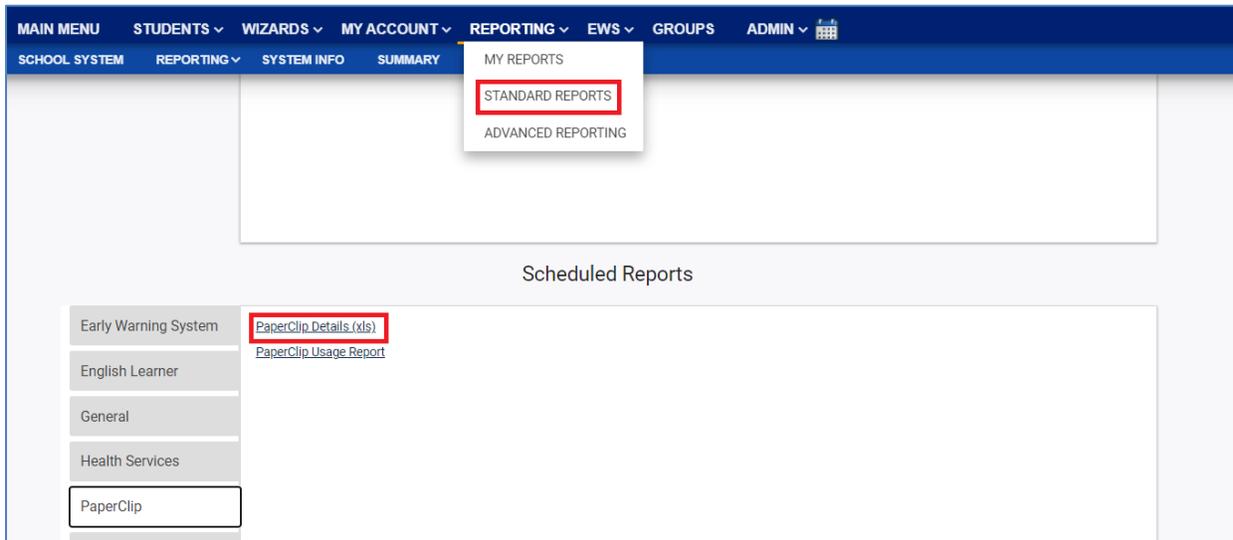
Date Generated	Created By	Report Type	Expiration Date
02/09/2021 15:50:00		PaperClip Usage Report	02/16/2021
02/08/2021 10:53:00		PaperClip Usage Report	02/15/2021

This report will export as an Excel file and will display the District Code, District Name, Year, Month, Usage (bytes), Average File Size, and Upload Type. Below is an example of the output of this report:

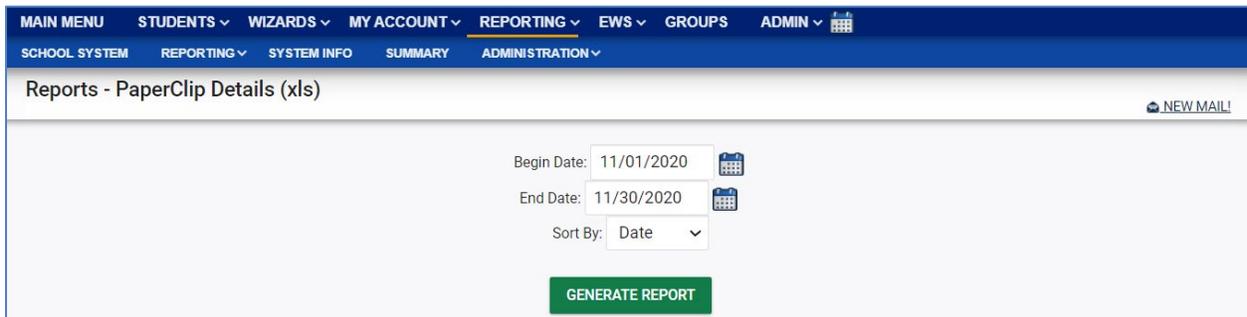
District Code	DistrictName	Year	Month	Usage (bytes)	Average File Size	UploadType
000	necatstest	2020	8	1405588655	740563.0427	Total
000	necatstest	2020	9	3005058761	422236.7235	Total
000	necatstest	2020	10	4006060545	398335.5419	Total
000	necatstest	2020	11	2922311188	391520.7915	Total
000	necatstest	2020	12	1694233325	405415.9667	Total

PaperClip Details (xls) report

If an LEA wants to monitor more detailed usage, the PaperClip Details (xls) report can show every file uploaded to the students document page over a specified date range. This report can be used to answer questions such as which users are uploading the most documents by either file size or document count. This report is accessed via the 'Reporting' tab on the Main Menu, using the 'Standard Reports' dropdown option. The report is found by selecting the 'PaperClip' standard reporting category as shown in the screenshot below:



When selected, the user will be prompted to enter a date range and the option to sort the report by Date, User, or Student. Enter the desired date range and sort option and click Generate Report:



When the report has finished running, it will be available under the 'Reporting' tab on the Main Menu, using the 'My Reports' dropdown option as shown in the screenshot below:

The screenshot shows the ECATS Reporting interface. The 'REPORTING' menu is open, and 'MY REPORTS' is highlighted. Below the menu, a table lists various reports with columns for Report, Date Created, Created By, System, School Areas, School, and User. The report 'PaperClip.Details.xls' is highlighted with a red box.

Report	Date Created	Created By	System	School Areas	School	User
Parent Consent Report	02/04/2021					
Parent Consent Export Report	02/04/2021					
PaperClip.Details.xls	02/04/2021					
Accommodations Report School/Grade/Class/Test	02/09/2021					

This report will export as an Excel file and will show the User who uploaded the file, the Student, Student Code, Document Type, Document Name, File Size (in bytes), and Date Uploaded. Below is an example of the output of this report:

User	Student	Student Code	DocType	Document Name	File Size	Date Uploaded
Test User 1	Test Student 1	111111	docx	Remote Learning Plan	161086	11/1/2020 9:05
Test User 1	Test Student 2	222222	pdf	Remote Learning Plan	217911	11/10/2020 9:05
Test User 2	Test Student 3	333333	doc	AU Worksheet	39514	11/15/2020 9:13
Test User 3	Test Student 4	444444	xlsx	Educational Diagnostic Report	914313	11/20/2020 9:15

*Note: The available file types for upload are doc, docx, jpg, pdf, png, rtf, tif, txt, xlsx

Related Documentation

Additional documentation related to PaperClip use can be found in the Documents Tab section of the ECATS Special Education – User Training Manual, which is in the Special Education Documents section under Resources on the Main Page of your ECATS site (screenshot below).

The screenshot shows the 'Resources' section of the ECATS site. It features a table with columns for Del, Pos, New Pos, File Type Category, Date Uploaded, Uploaded By, and File Name. The document 'ECATS Special Education - User Training Manual' is highlighted with a red box.

Del	Pos	New Pos	File Type Category	Date Uploaded	Uploaded By	File Name
<input type="checkbox"/>	25	<input type="text"/>	Special Education Documents	07/11/2019	Beth Burris	ECATS Special Education - Training Guide
<input type="checkbox"/>	29	<input type="text"/>	Special Education Documents	07/24/2019	Beth Burris	ECATS Special Education - Quick Reference Card
<input type="checkbox"/>	32	<input type="text"/>	Special Education Documents	09/13/2019	Ginger Haynes	ECATS Special Education - User Training Manual