

# 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

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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?**

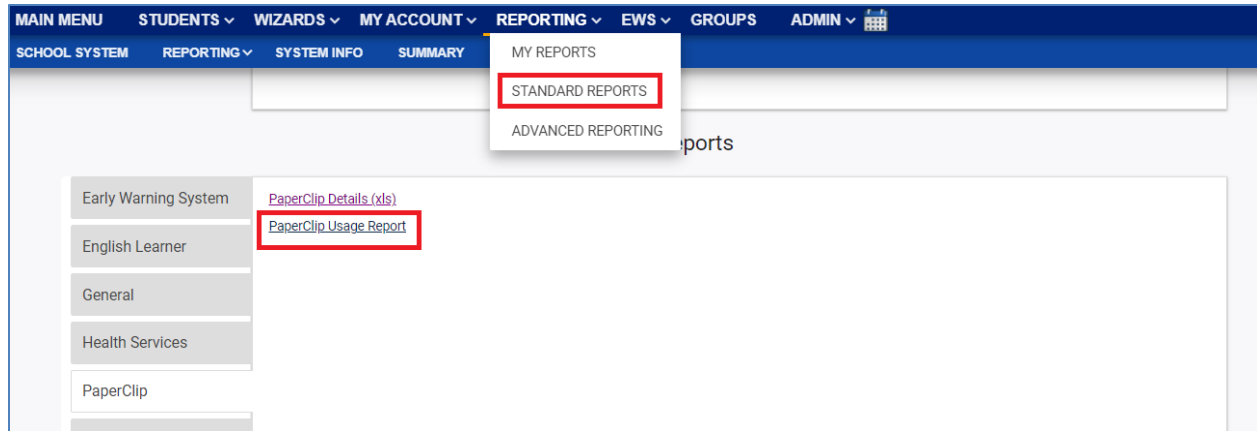
See the section below on “Tips for Uploading Documents with PaperClip”.

### **Tips for Uploading Documents with PaperClip**

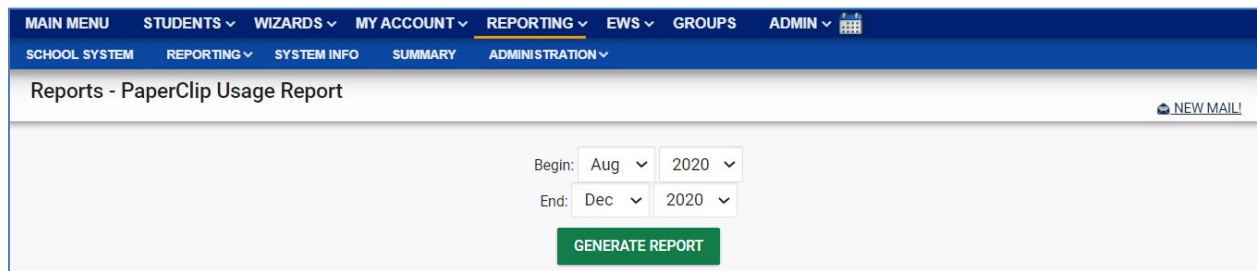
1. Be mindful of the file type you upload (look for the file extension at the end of the file name, e.g. ‘.pdf’ or ‘.jpg’).
  - Image files (jpg, png, tif) can be large
  - Upload document (pdf or docx) instead of rich text (rtf) files
2. Adding images, graphs, charts, or complex text formatting will 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 the ECATS Reporting interface. The top navigation bar includes: MAIN MENU, STUDENTS, WIZARDS, MY ACCOUNT, REPORTING, EWS, GROUPS, and ADMIN. The 'REPORTING' dropdown is open, showing 'MY REPORTS' and 'STANDARD REPORTS' (highlighted with a red box). Below this, a list of reports is displayed, including 'Early Warning System', 'English Learner', 'General', 'Health Services', 'PaperClip', 'Progress Track', 'Service Logging', and 'Special Education'. The 'PaperClip' report is highlighted. Below the list, the 'Saved System Reports' table is shown, with columns: Date Generated, Created By, Report Type, and Expiration Date. The 'PaperClip Usage Report' is highlighted in the 'Report Type' column.

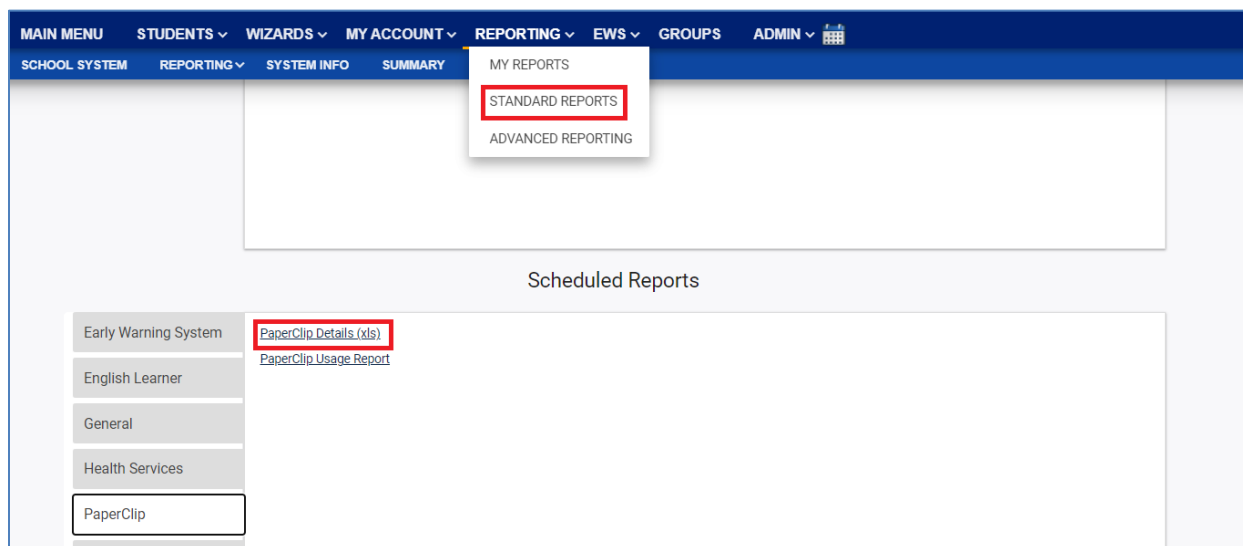
Date Generated	Created By	Report Type	Expiration Date
02/09/2021 15:50:00		<b>PaperClip Usage Report</b>	02/16/2021
02/08/2021 10:53:00		PaperClip Usage Report	02/15/2021

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:

A screenshot of the 'PaperClip Details (xls)' report generation form. The page title is 'Reports - PaperClip Details (xls)'. Below the title, there are input fields for 'Begin Date' (11/01/2020) and 'End Date' (11/30/2020), each with a calendar icon. Below these is a 'Sort By' dropdown menu set to 'Date'. At the bottom, there is a green button labeled 'GENERATE REPORT'. In the top right corner, there is a 'NEW MAIL' icon.

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:

MAIN MENU

STUDENTS

WIZARDS

MY ACCOUNT

REPORTING

EWS

GROUPS

ADMIN

MY REPORTS

STANDARD REPORTS

ADVANCED REPORTING

Report Level

Report	Date Created	Created By	System	School Areas	School	User
<a href="#">Parent Consent Report</a>	02/04/2021					
<a href="#">Parent Consent Export Report</a>	02/04/2021					
<a href="#">PaperClip Details (xls)</a>	02/04/2021					
<a href="#">Accommodations Report School/Grade/Class/Test</a>	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).

Resources							<a href="#">Review the License Agreement</a>	<a href="#">Upload File(s)</a>	<a href="#">Delete/Update Documents</a>
EWS & Intervention Planning Documents	Del	Pos	New Pos	File Type Category	Date Uploaded	Uploaded By	File Name		
Federal Reporting	<input type="checkbox"/>	25		Special Education Documents	07/11/2019	Beth Burris	<a href="#">ECATS Special Education - Training Guide</a>		
Service Logging Documents	<input type="checkbox"/>	29		Special Education Documents	07/24/2019	Beth Burris	<a href="#">ECATS Special Education - Quick Reference Card</a>		
Special Education Documents	<input type="checkbox"/>	32		Special Education Documents	09/13/2019	Ginger Haynes	<a href="#">ECATS Special Education - User Training Manual</a>		