



Archiving Documents

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Statement of Benefits

- Electronic document generation and storage system - no paper or ink required!
- Integrated directly into student accounts - access electronic copies of documents directly from the SIS with a click of the mouse.
- Supports electronic facsimile signatures with a mouse, touch-pad, or pen-board.
- Documents generated in SpSIS or ReportWriter can be archived at any time.
- Dramatic time savings: Documents generated do not need to have search field data entered manually.
- Electronic copies of work samples can be entered directly by teachers.
- Compliance and oversight reports let you know who has completed and archived records.
- Ability to accept, reject, or skip documents administratively. Archived documents that are rejected are sent automatically back to the staff member that created them.
- Archive any kind of file - PDFs, digital images, word processing and power-point documents - even audio files and videos!
- Redundant design with automatic fail over and triple-redundant storage provides extremely high availability 24/7.
- Integrated notification lets teachers know if a specific report has already been archived for a particular student.

Hardware/Software Requirements

- Windows 95/98/2000/XP/Vista or Macintosh OSX 10.3 or newer accessible by signatories.
- School Pathways Student Information System
- School Pathways Student Information System and ReportWriter for the signatory.
- Adobe Acrobat Professional, Foxit Reader, or similar software for facsimile signatures installed on signatory's computer. Foxit reader free version can be used by a Foxit stamp will be applied to all documents.
- Wacom board or similar pen-pad recommended for electronic signatures is optimum but any mouse will work.

Instructions for Use: Signing Documents

Before any documents are signed electronically, you should check with your auditor to make sure they will accept these signatures.

Overview: To archive reports such as Master Agreements, Learning Records, and Report Cards, you'll perform the following basic steps:

1. Ensure the student has been "migrated" in ReportWriter.
2. Create the records you wish to archive.
3. Sign the documents electronically.
4. Archive the documents.
5. Synchronize ReportWriter so that the archived documents are uploaded to the server and thus viewable in SpSIS.

Step 1: Ensure the student has been "migrated" in ReportWriter.

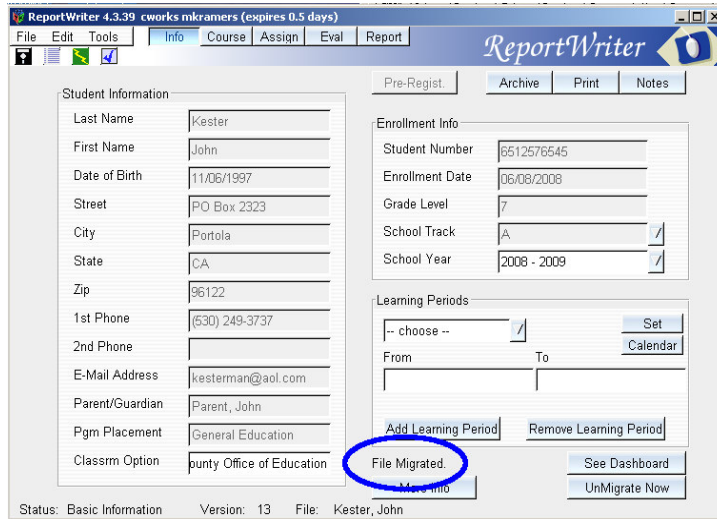


Illustration 1: A student file that has been "migrated".

Step 2: Create the document(s) you wish to archive.

Next to the "print" button in ReportWriter you'll find a button called "Archive". When pressed, it creates the document in the same fashion as the print button, but then goes into "hibernation" while it awaits you to sign the document.

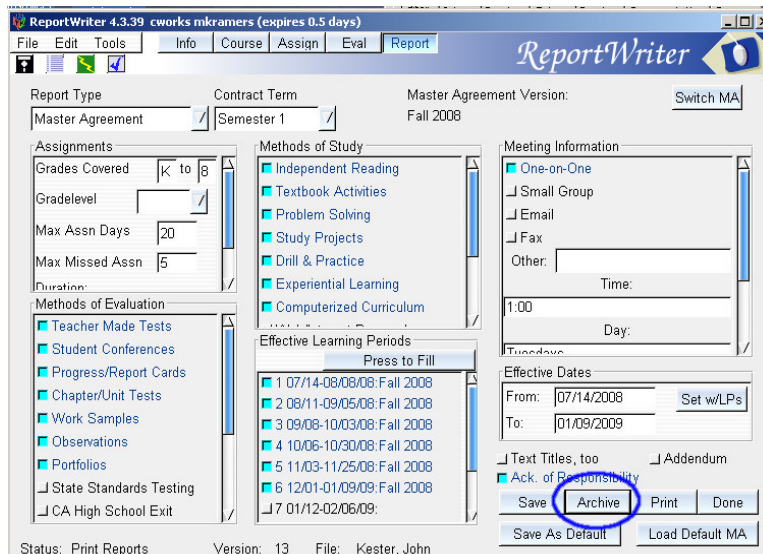


Illustration 2: "Archive" button in ReportWriter.

Step 3: Sign the documents electronically.

Use the "pencil" tool in Adobe Acrobat Professional or Foxit PDF reader to annotate the PDF document with your signature.

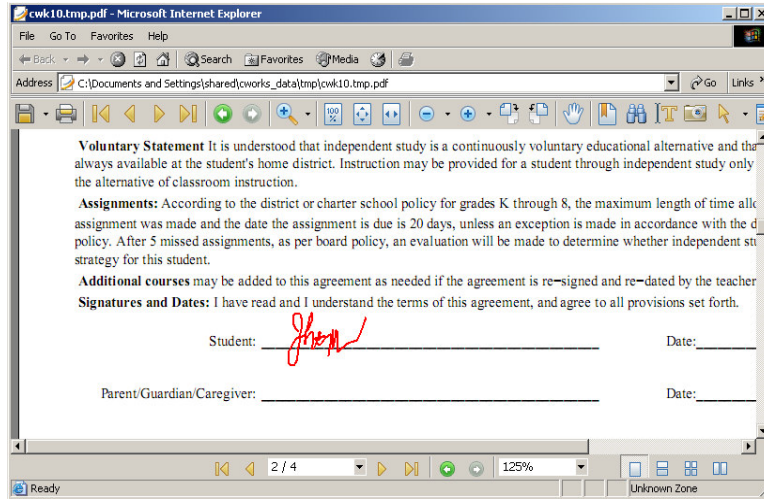


Illustration 3: Signing Document in Foxit reader

Click the disk icon in the top left corner to save the file "where is", without renaming it. By not changing the name, ReportWriter can archive the document immediately. If you use "save-as" or "save a copy", you'll have to use a different means to load the file.

Step 4: Archive the documents with a button-click.

When you have signed the document, find the "Queue for Archive" window on your tool bar and click ARCHIVE. Now you can rename the document and save it to the Student's file.

~ OR ~

If you save the document to your desktop. You must click the button "Pick another file" then click the Desktop button and find the file in the list.

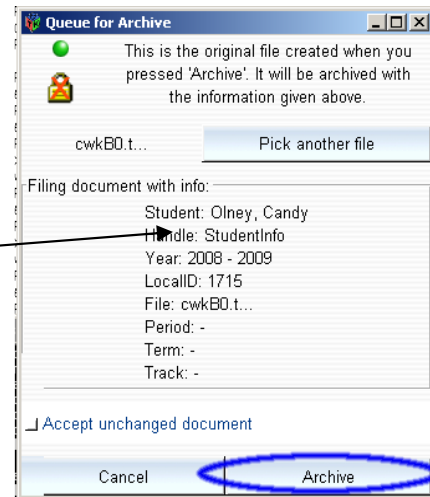


Illustration 4: Click the "Archive" button to archive a document.

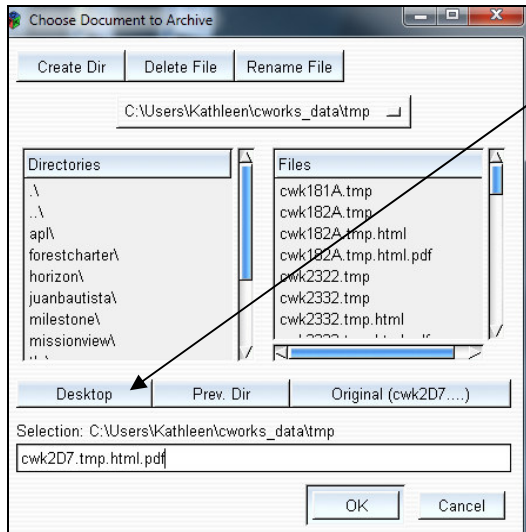


Illustration 5: If your document was saved To the desktop, click the "Desktop" button.

When you have successfully archived a document, ReportWriter will inform you by putting a padlock icon on the archive button. If you rest your mouse pointer over the button (without clicking) it will tell you the date and time that the archive operation was performed.

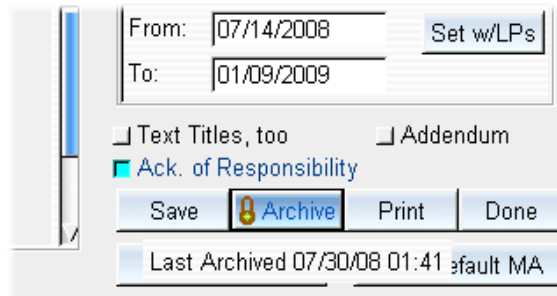


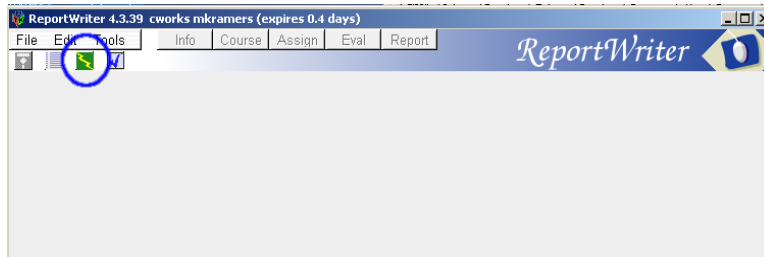
Illustration 6: Padlock icon, with date & time shown

Step 5: Synchronize ReportWriter so that the archived documents are uploaded.

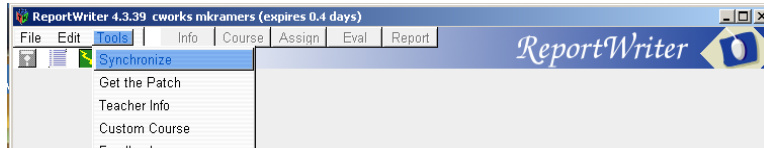
Now that the file(s) have been queued up for archiving into the SchoolPathways SIS, it is now time to submit the files for access by the administration office.

You can repeat steps 1 through 4 as many times as you like before synchronizing

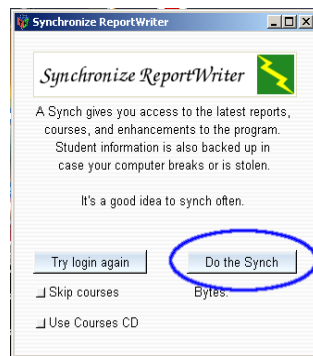
Press the "lightning bolt" icon in ReportWriter to synchronize immediately.



Or use the menu to begin synchronizing ReportWriter:



ReportWriter will prompt you to synchronize. When it does, Press the "Do the Synch" button. The time that it takes to synchronize depends on the amount of data to be exchanged and the speed of your Internet connection.



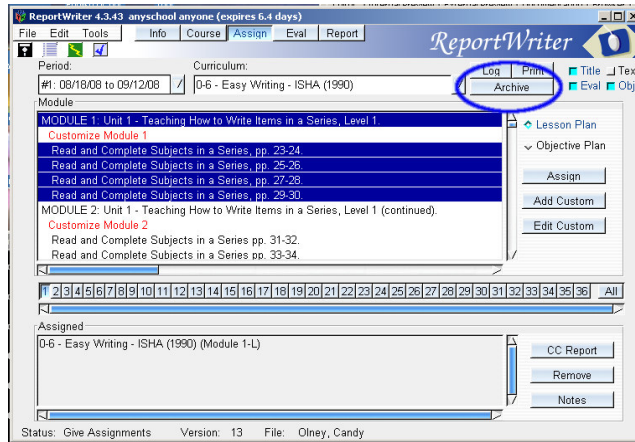
You have signed and uploaded your archived documents!

Appendix 1: Using ReportWriter to archive work samples.

ReportWriter can be used to archive work samples. *(Check with your school administrators to determine the policies for your school)*

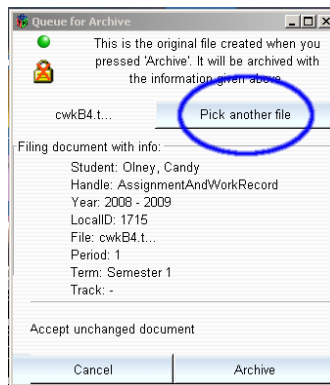
A) Generate the content of the work sample. This may be a scan of student homework, a digital camera picture of the work in question, or a copy of the documents generated by the student. (EG: Homework typed up in Microsoft Word)

B) In ReportWriter, go to the "Assign" tab for the student you wish to save work samples for. Click "Archive" as if you wanted to archive the student's Assignment and Work Record.

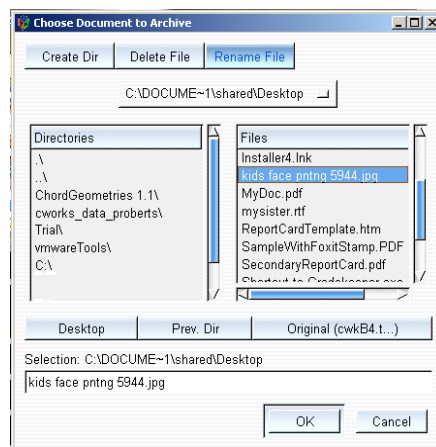


C) Close the PDF copy of the Assignment and Work record - it's not needed.

D) Notice that the handle is set to "Assignment And Work Record". On the Archive window, click "Pick another file".

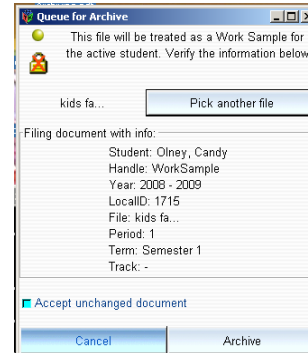


E) Browse to the file you wish to save as a work sample, click "OK" when you have found the file.



F) When you have selected the file, you will be returned to the Archive screen. Notice that the Handle is now called "WorkSample", the status button at the top left is yellow, and the "Accept unchanged document" checkbox is clicked. Click "Archive" to complete this process.

This process is the same with either electronic or digital signatures.



Instructions for Use: Administration

There is no technical administration necessary to use document archives. Virus scanning of all documents is automatically performed when documents are loaded.

1. Managing archived documents by student.

1A. ReportWriter Documents

Documents created by ReportWriter can be accepted/rejected on a teacher/student basis. When you reject a document, the status of the rejection is sent back to ReportWriter and the teacher/user is notified when he/she attempts to work with the student's data in ReportWriter.

A) Start at the dashboard for a student, click "View Archive Documents".

2010				
Spring 2010	English 10B	2131	11/30/09	05/28/10 5
Spring 2010	US History B	2709	11/30/09	05/28/10 5

*Items shown in gray are not current

Attendance History

- [2009 - 2010](#)

Test Score History

No test scores found for this student

[View History](#)

Student Archive Documents

[View Archives](#)

B) Here, you'll see all documents that have been archived for the student.

List of Archived Documents

Candy A. Olney Grade: 5 Local ID: 1715 Student Statewide ID: 1968574758
 Anytown, CA 99999 Age: 18 Gender: M Date of Birth: 08/16/1990
 123.123.1234 Parent(s): One, Any

Only show unapproved documents. [Upload](#)

Save/Set Status Change

Student	Handle	Src	Track	Year	Period	LP	Archived	Uploaded	Login	Status	Vrfy	View
Olney, Candy	AssignmentAndWorkRecord	rw	-	2008 - 2009	Semester 1	1	09/23/2008	09/23/2008	anyone	Unapproved ▾		

Save/Set Status Change

C) Click "View" to see the document as it was archived by the staff member in question.

D) Use the "Status" dropdown to set the status of the document as desired. Click "Save/Set Status Change" to save this status change. If you choose Reject, you'll be prompted for a reason for the rejection - this is what the teacher will see in ReportWriter on their next synch.

Only show unapproved documents. [Upload](#)

Save/Set Status Change

Student	Handle	Src	Track	Year	Period	LP	Archived	Uploaded	Login	Status	Vrfy	View
Crow, Marcia	AssignmentAndWorkRecord	rw	-	2009 - 2010	Semester 1	4	02/16/2010	02/16/2010	jgarrity	Unapproved ▾		
Crow, Marcia	AssignmentAndWorkRecord	rw	-	2009 - 2010	Semester 1	3	02/16/2010	02/16/2010	jgarrity	Unapproved ▾		
Crow, Marcia	StudentMA	rw	-	2009 - 2010	Semester 1	-	02/16/2010	02/16/2010	jgarrity	Unapproved ▾		

Save/Set Status Change

E) If you have a file you wish to upload immediately, such as a scanned Work Sample, you can load it immediately by choosing "Upload" at the top right.

1B. Work Samples

Student work samples can be uploaded and archived through the student dashboard.

Click "View Archives" on the lower left of the dashboard.

Only show unapproved documents. Upload

Save/Set Status Change

Student	Handle	Src	Track	Year	Period	LP	Archived	Uploaded	Login	Status	Vrfy	View
Crow, Marcia	AssignmentAndWorkRecord	rw	-	2009 - 2010	Semester 1	4	02/16/2010	02/16/2010	kgarrity	Unapproved		
Crow, Marcia	AssignmentAndWorkRecord	rw	-	2009 - 2010	Semester 1	3	02/16/2010	02/16/2010	kgarrity	Unapproved		
Crow, Marcia	StudentMA	rw	-	2009 - 2010	Semester 1	-	02/16/2010	02/16/2010	kgarrity	Unapproved		
Crow, Marcia	WorkSample	rw	-	2009 - 2010	Semester 1	4	02/16/2010	02/16/2010	kgarrity	Unapproved		

Choose a handle – or you don't see one you can use, create your own in the blank space provided. You do not have to use the Form and Tracking numbers because you entered through the student's file.

• **WorkSamples:** Please enter the form and tracking number:

Form Number:	<input type="text"/>
Tracking Number:	<input type="text"/>

• Or enter the following data manually, and do not enter a form and tracking number.

Handle:	<input type="text"/>	-- Suggested Handles --
School Track:	-- Select School Track --	
School Year:	-- Select School Year --	
School Period:	-- Select School Period --	
LP:	-- Select LP --	

Then choose the school track, year, period and LP.

Click Browse to find the document in your computer files. Set the Status and then click ARCHIVE FILES.

• Or enter the following data manually, and do not enter a form and tracking number.

Handle:	WorkSample	WorkSample
School Track:	A	
School Year:	2009 - 2010	
School Period:	Semester 1	
LP:	3	

Archive Files

Set All Status: -- Choose --

Upload file: Unapproved

Upload file: Unapproved

2) Managing archived documents for *all* students.

Rather than view specific documents for a single student, you can see an "instant summary" of documents for all students in one large view.

A) Go to Admin -> Archived> Archive Documents List

B) Functionality is the same as for managing a single student except that the list is no longer restricted to operation for a single student.

List of Archived Documents

Only show unapproved documents. [Upload](#)

Student	Handle	Src	Track	Year	Period	LP	Archived	Uploaded	Login	Status	Vrfy	View
(+) Arena_Jessica	MyTrialDocument	sis	A	2009 - 2010	Semester 1	-	06/26/2009	06/26/2009	leann	Unapproved		
Brownell_Oscar	AssignmentAndWorkRecord	rw	-	2009 - 2010	Semester 1	5	02/16/2010	02/16/2010	igarrity	Unapproved		
Brownell_Oscar	AssignmentAndWorkRecord	rw	-	2009 - 2010	Semester 1	4	02/02/2010	02/03/2010	igarrity	Unapproved		
Brownell_Oscar	AssignmentAndWorkRecord	rw	-	2009 - 2010	Semester 1	3	01/31/2010	01/31/2010	igarrity	Unapproved		
(+) Brownell_Oscar	AssignmentAndWorkRecord	rw	-	2009 - 2010	Semester 1	2	01/31/2010	01/31/2010	igarrity	Accept		
(+) Brownell_Oscar	AssignmentAndWorkRecord	rw	-	2009 - 2010	Semester 1	1	02/16/2010	02/16/2010	igarrity	Accept		
Brownell_Oscar	Immunization Record	sis	A	2009 - 2010	-	-	02/16/2010	02/16/2010	leann	Unapproved		
Crow_Marcia	AssignmentAndWorkRecord	rw	-	2009 - 2010	Semester 1	4	02/16/2010	02/16/2010	igarrity	Unapproved		

3) Managing documents for all students - Compliance.

The SchoolPathways SIS has another view for document archives - a "Compliance Report" view. This is used to determine if requirement documents have, in fact, been entered and/or approved for all students within the system.

3A. Set up compliance handles:

- Go to Admin -> Archives -> Archives Compliance.
- Click "Edit Handle Reqs" tab at the top.
- Click "Add New Handle Requirements" at the top right.
- Select the handle from "Suggested Handles" (recommended) or manually enter a handle you wish to enforce (not recommended)
- Fill in any additional fields that will be required for the particular report. Make sure that it makes sense! (For example, do not select "Learning Period" for a Report Card, since they are issued by School Period and not Learning Period.)
- Click Save.
- You can edit requirements at any time after a Handle has been defined by clicking "Edit" on the right from the "Edit Handle Reqs" screen. Once records have been saved using the handle, you cannot edit the handle.

Choose a handle and other pertinent fields and Generate the Report.

Student Archive Compliance Report

Report on:

* Handle:	-- Select Handle --
* Staff:	-- All Staff --

Report on students enrolled within:

Educational Program	-- Show All --
* Classes:	-- Show All --
* Schoolyear	2009 - 2010
School Period	Track A: Quarter 3 (01/04/2010 - 03/12/2010)
* Start Date	01/04/2010
* Finish Date	03/12/2010

3B. Using compliance report:


- From the "Student Archive Compliance Report" screen, select the Handle you wish to enforce.
- Specify other information as appropriate. For example, you can filter by Educational Program, Learning Center, Schoolyear, etc.
- Click "Generate Report".
- You'll see a color-coded table with all students that apply within the parameters you gave.

Student	Legend for Approval Process			
	2009 - 2010 LP 1	2009 - 2010 LP 2	2009 - 2010 LP 3	2009 - 2010 LP 4
Abbav, Christopher	A	A	A	U
Allen, Bronwn	A	A	A	?
Allen, Colin	A	A	A	?
Allen, Dylan	A	A	A	?
Allen, Morgan	A	A	A	?
Allmon, Sofia	A	A	A	U
Alvarado, Thomas	A	A	A	U
Alvarez, Ahlaj	A	A	A	A
Alvarez, Austin	A	A	A	U
Alvarez, Evan	A	A	A	U
Andersen, Abrianna	A	A	A	U
Andersen, Grace	A	A	A	U
Andersen, Shenhard	A	A	A	U

Each cell will include a link to the student's document administration area. You can view the Status and also view the actual document. Click on the green arrow at the end of each row.

Click here to view actual document.

List of Archived Documents

 **Christopher J. Abbay**
 1587 Billie Road
 Paradise, CA 95969
 530-872-5193

Grade: 8	Local ID: 45601	Student Statewide ID: 8095070248
Age: 13	Gender: M	Date of Birth: 09/20/1996
Enroll Start: 07/21/2009	Parent(s): Abbay, Mark, Nancy	


Only show unapproved documents. Upload

Save/Set Status Change

Student	Handle	Src	Track	Year	Period	LP	Archived	Uploaded	Login	Status	Vrify	View
(+) Abbay, Christopher	AssignmentAndWorkRecord	rw	-	2008 - 2009	Semester 2	8	06/01/2009	06/01/2009	s.curry	Accept		
Abbay, Christopher	AssignmentAndWorkRecord	rw	-	2008 - 2009	Semester 2	7	05/19/2009	05/19/2009	s.curry	Accept		
Abbay, Christopher	AssignmentAndWorkRecord	rw	-	2008 - 2009	Semester 2	6	04/10/2009	04/10/2009	s.curry	Accept		
(+) Abbay, Christopher	AssignmentAndWorkRecord	rw	-	2008 - 2009	Semester 2	5	03/16/2009	03/16/2009	s.curry	Accept		
Abbay, Christopher	AssignmentAndWorkRecord	rw	-	2009 - 2010	Semester 1	4	01/27/2010	01/27/2010	s.curry	Unapproved		
Abbay, Christopher	AssignmentAndWorkRecord	rw	-	2008 - 2009	Semester 1	4	02/01/2009	02/01/2009	s.curry	Accept		
Abbay, Christopher	AssignmentAndWorkRecord	rw	-	2009 - 2010	Semester 1	3	12/10/2009	12/10/2009	s.curry	Accept		
Abbay, Christopher	AssignmentAndWorkRecord	rw	-	2008 - 2009	Semester 1	3	12/10/2008	12/11/2008	s.curry	Accept		

Click here to view actual document.

Once the document is reviewed, choose the correct status. Then click the SAVE/SET STATUS CHANGE button.

 **Student Assignment & Work Record**

Student Name: Oscar Brownell Student# Grade: 01 Form: 433042
 Teacher: Jay Garrity Teacher# na Learning Period: 2 Tracking: 663
 Date Assignment Made: 08/17/2009 Date Assignment Due: 09/11/2009

The number of attendance days possible for this student's learning period is 19. In my professional judgment, the student has completed work that has a value of ___ days.

Teacher Signature: *Kathleen Brennan* Date: *9/11/09*

Category: Language Arts
Course Title: Language Arts
Grade: 0
Module 3: Books 5-6: Vultures on Vacation; My Monster and Me.
Objectives: 1. Understand alliteration and letter recognition.