



Portland Public Schools

DocuWare Student and School Records User Guide

Version 1.7
April 20, 2023

Table of Contents

Introduction	3
-Important Resource and Contact information	3
Logging Into the System	4
-Logging into DocuWare for the first time	4
-Creating a multi-cabinet search	5
Performing a Student Records Search	6
Using the Available Tools	9
-Using Full Text Search	9
-Using the Annotation Tools	11
Scanning New Records to DocuWare	13
-Cover sheet method	13
-Document Tray method	15
Procedures for Paper Records After Digitization	19
-Check Scanned Records Report	19
-Secure Shredding	20

Introduction

This training guide is a quick reference for getting started with the digital records management system known as DocuWare. The PPS district student cumulative files have all been converted into our digital records management system. If you encounter any issues with any of the steps explained in this guide, please use the contact information provided below to resolve.

Important Resource & Contact Information

- Check to see if you have the most recent version of this user guide as well as the available coversheets by visiting our pps.net homepage at www.pps.net/digitalrecords
- For problems with logging into DocuWare
- For problems with scanning and uploading student records
- For problems with finding an existing record in DocuWare
- If you need a document deleted

Contact Records Management by:

Email: records@pps.net

Submit a ticket through Fresh Service at support.pps.net

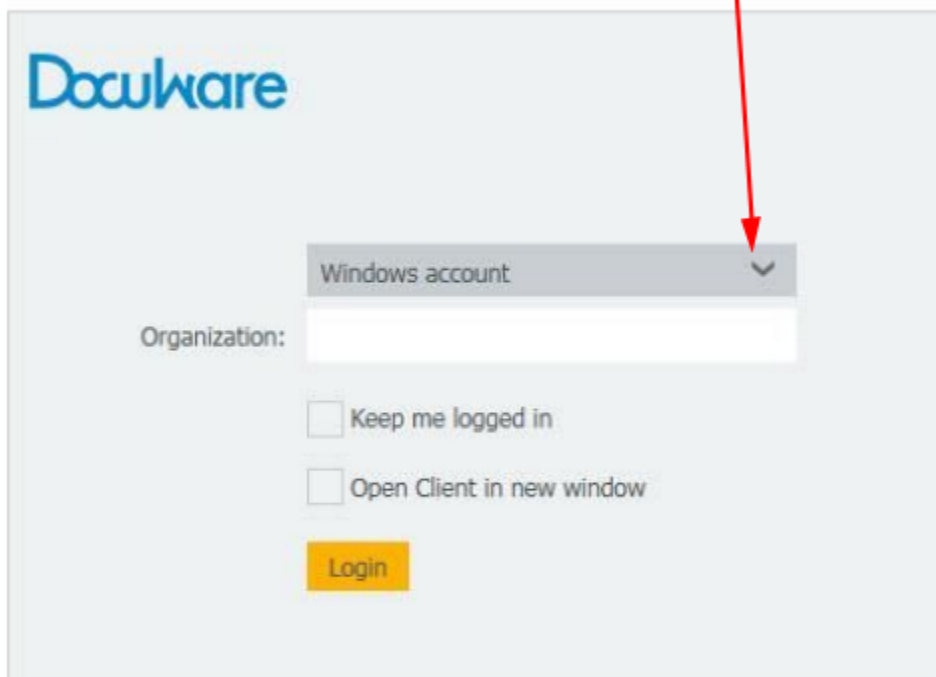
Phone: ext. 74860

Logging Into The System

-Logging into DocuWare for the first time

To access the system, open any browser window and type: **dms.pps.net**

1. **IMPORTANT:** Use the drop down and select **WINDOWS ACCOUNT**
2. Select **LOGIN**
3. A second window will open for you to enter your PPS username and password.



DocuWare

Windows account

Organization:

Keep me logged in

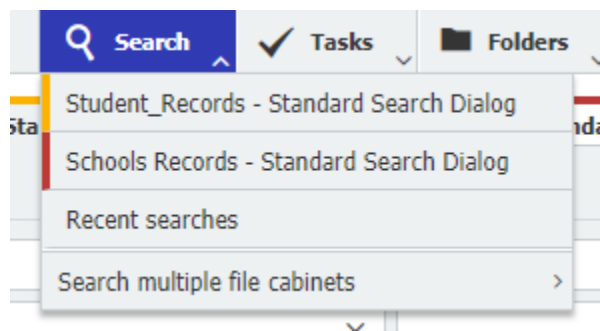
Open Client in new window

Login

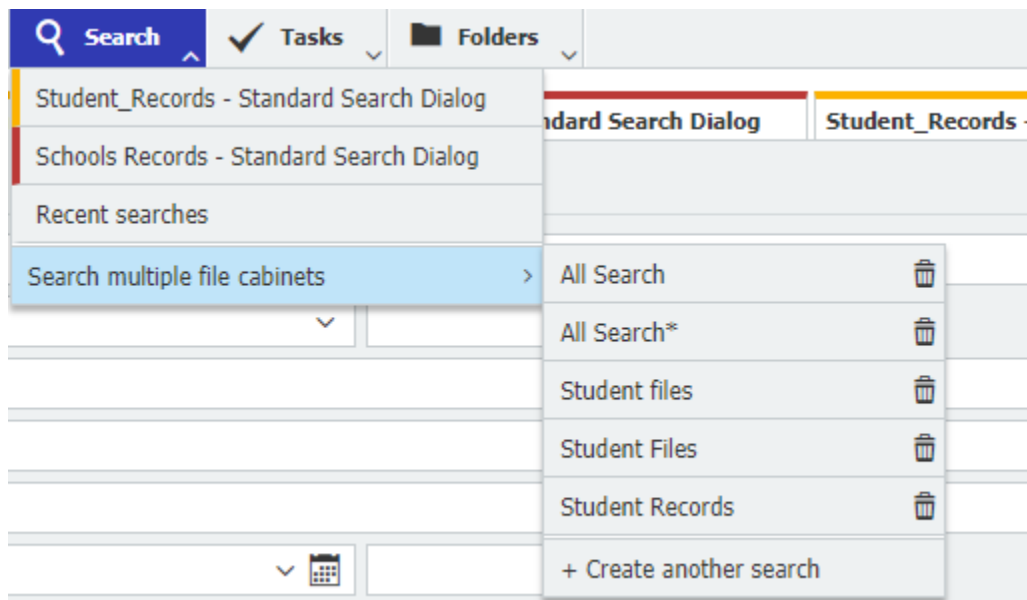
-Creating a Multi-Cabinet Search

*This process will only need to be performed once. When you've saved your options, the system will default to your saved search.

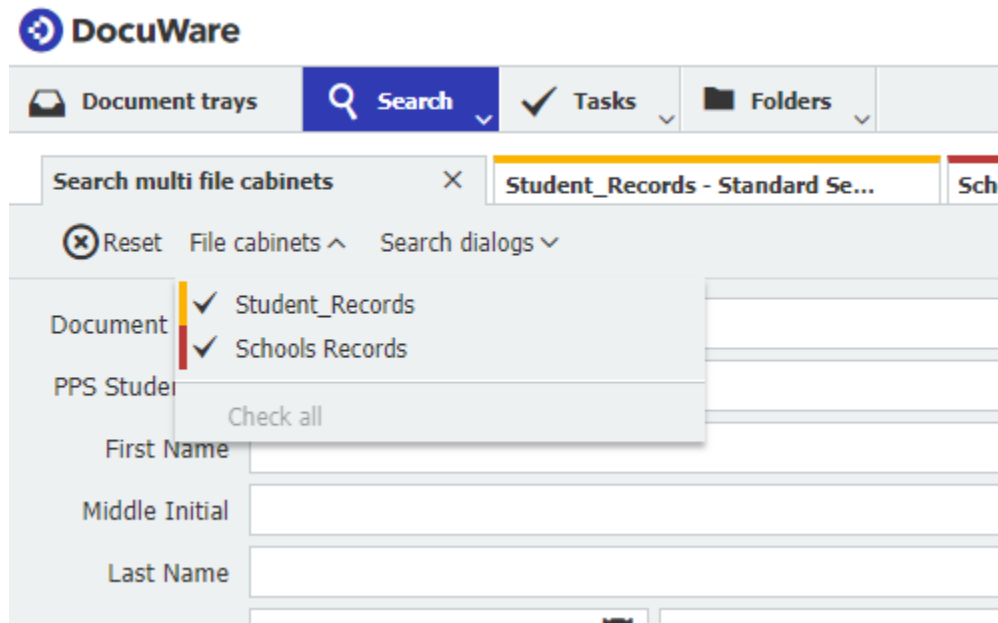
1. Select the **SEARCHES** button and choose the “Search multiple file cabinets” option.



2. Choose “Create another search”



3. After your search form loads, select the “File cabinets” menu as shown below. Click “Student Records” and “School Records” so there’s a check mark next to each one.



4. Next to the orange search button in the center of the screen, you’ll see a

“>Save” option.  Click the Save option and give your multi-cabinet search a name, such as “Student-School Records”.

5. You can now get back to your multi-cabinet search by following step #1 But instead of choosing “Create another search”, you will choose the saved search you’ve just created.

NOTE: You can only do a combined search for the Student Records and School Records cabinet. The other cabinets are not compatible with the multi-cabinet search function.

Performing a Student Records Search

*You can use any of the search fields to help search for student cumulative files. You can use either one or several fields to narrow down your search.

Example:

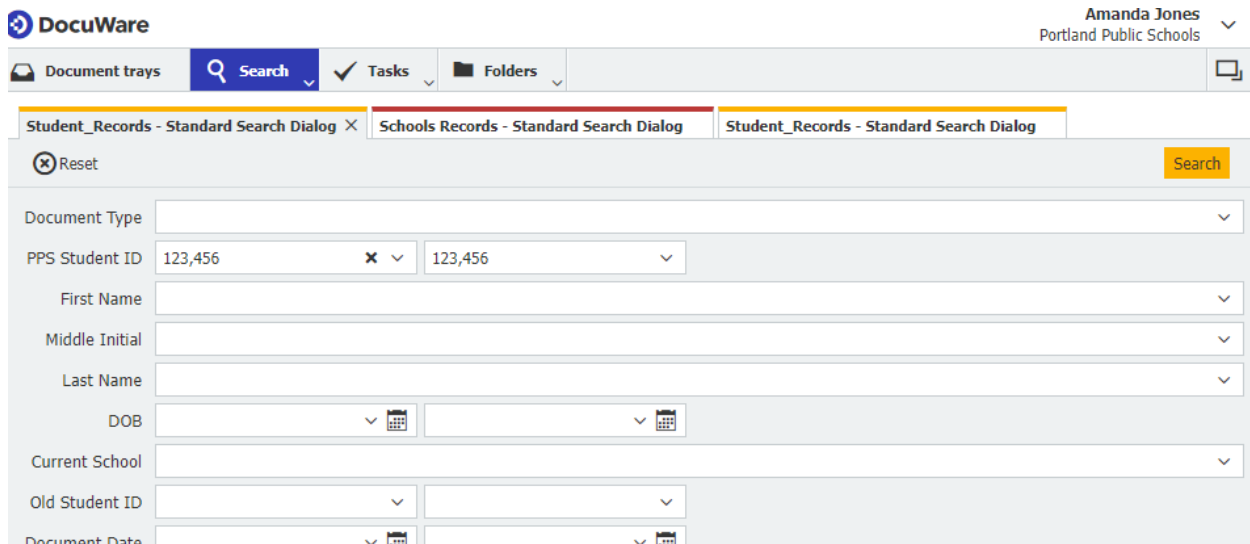
- Typing in the Student ID will give you all records for that student.
- Typing in the Student ID AND Document Type will show only the type of document selected for the given student.

To perform a typical search,

1. Type in a Student ID in the PPS Student ID field.
2. Use the TAB key to move to the next field on the same line (this will automatically fill in the same value in the second field)

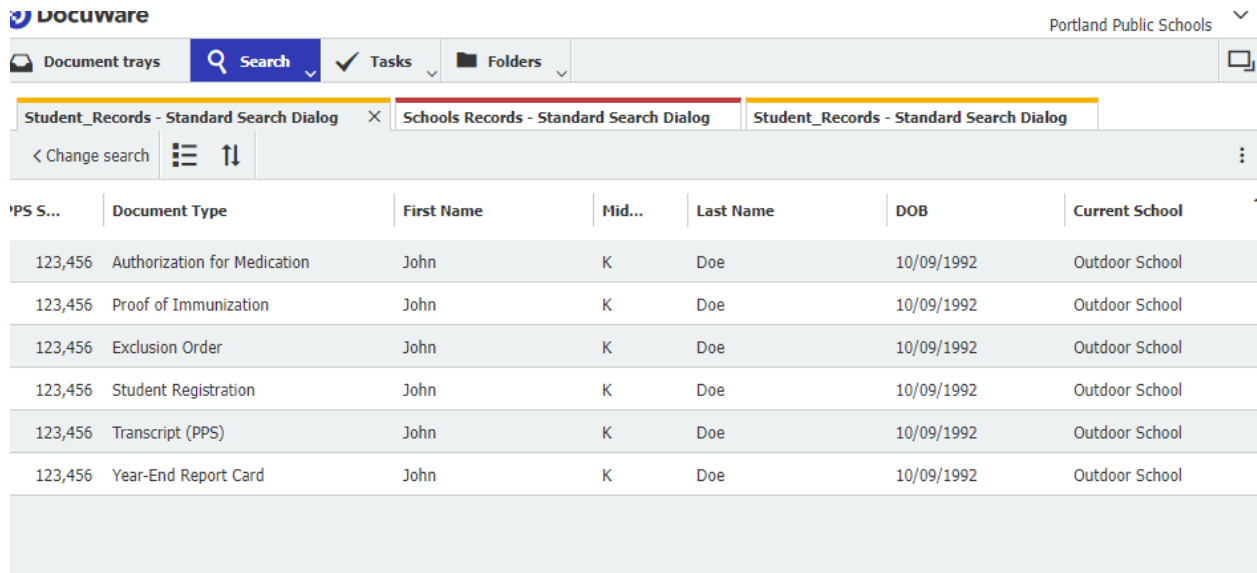
NOTE: If the SID is not in both SID fields, your search will produce information for other students besides the one you are searching for.

3. Click the orange SEARCH button in the center of your screen.

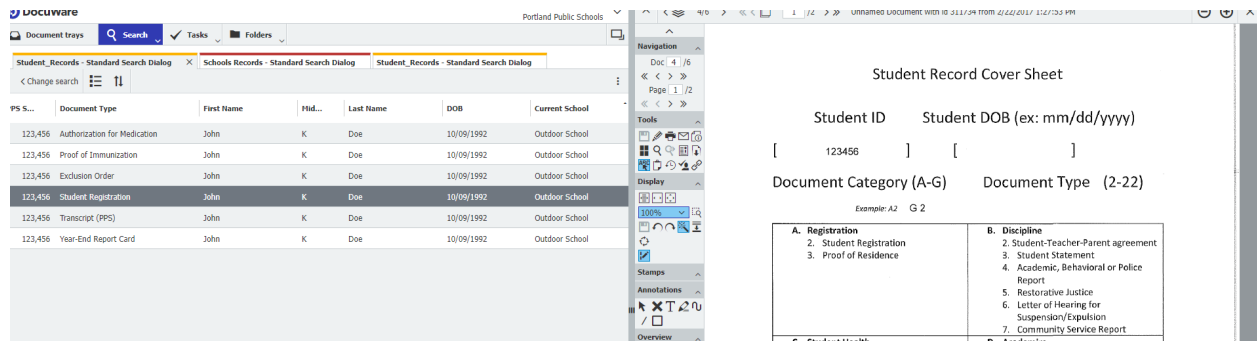


The screenshot shows the DocuWare interface with a search dialog open. The user is logged in as Amanda Jones at Portland Public Schools. The search dialog is titled 'Student_Records - Standard Search Dialog' and contains several input fields: Document Type, PPS Student ID (with two fields, both containing '123,456'), First Name, Middle Initial, Last Name, DOB (with two date pickers), Current School, Old Student ID (with two fields), and Document Date (with two date pickers). A 'Reset' button is on the left and a 'Search' button is on the right.

*If there have been documents uploaded for the student you are searching for, your search results will show up as a list view of the documents available.

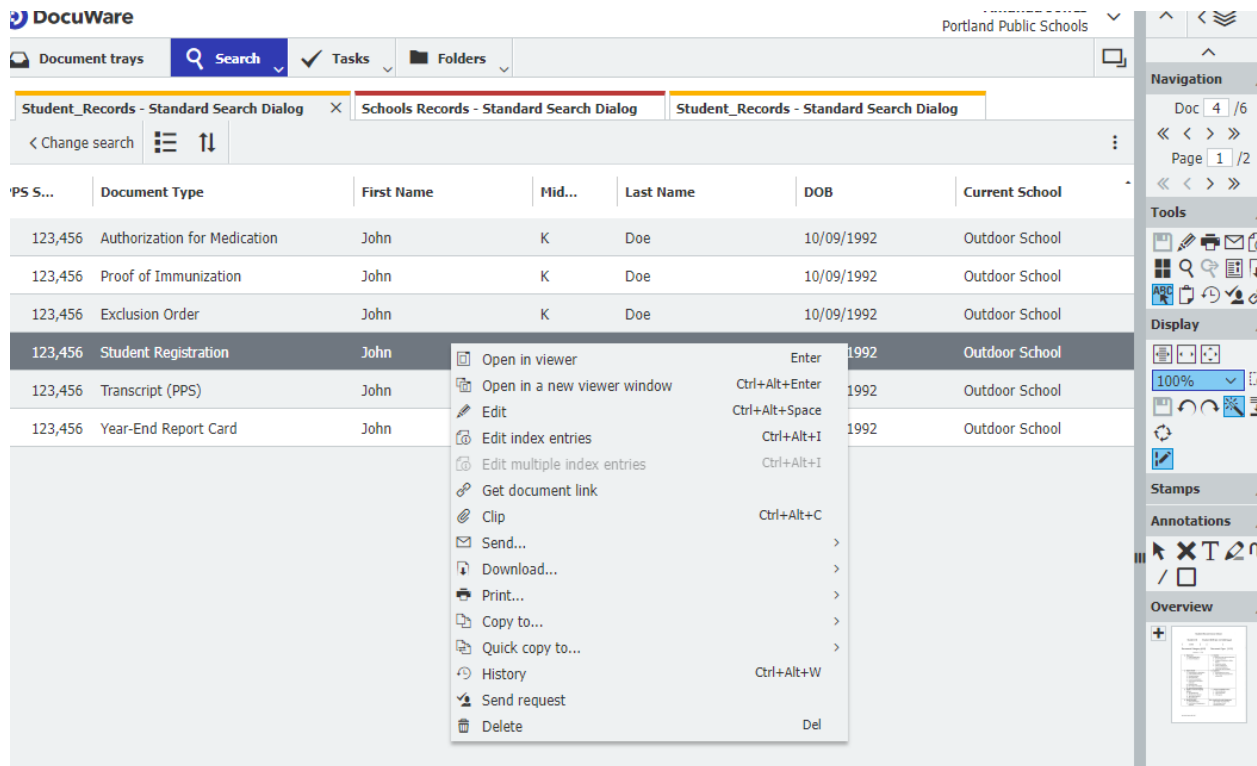


4. To view a document, double click on the search result line and the document image will open in the window to your right.



*You can resize the view window by moving the bar that separates the search window and the document view window by moving the bar left or right.

5. Right click on the document in the search window to get options that you might need to process the document such as PRINT or DOWNLOAD. Some options might not be available depending on your access permissions. NOTE: Only Records Management has the DELETE option.

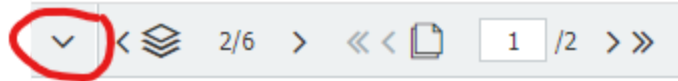


Using the Available Tools

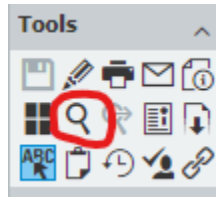
-Using Full Text Search

Records in DocuWare that fall under the types “Cumulative Folder Misc.”, “Student Registration”, and “Student Medical Record” are actually single documents that contain multiple pages. For these kinds of documents, you can use the Full Text search to find a particular page more quickly.

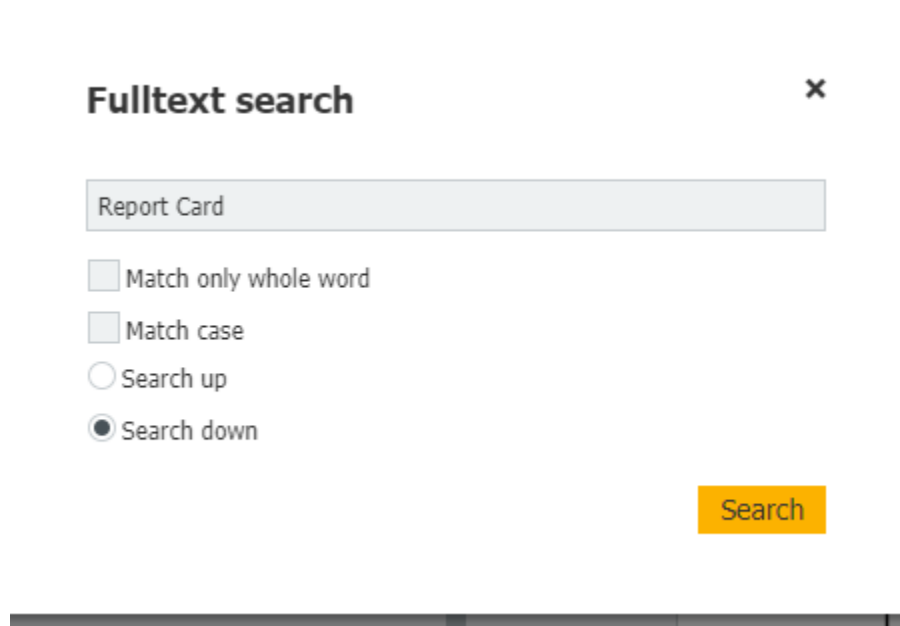
1. After you’ve performed a search for a student’s file and selected a document for viewing, you should see a toolbar running down the center of the screen. If you do not see the toolbar, you may need to open it. To do so, look for and click the little menu caret above the document viewing pane.



2. Once you have the toolbar open, locate the “Tools” section as shown below. Notice the magnifying glass icon. Click the icon to open the search dialog box.

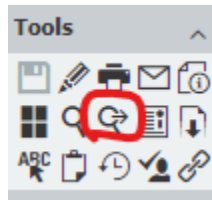


3. Type in a keyword you would like to search such as “Report Card” and click the orange Search button.



4. By clicking the Search button, the system will find the first instance of the keyword you supplied. Your keyword will be highlighted in yellow. If the system has located multiple instances of the keyword, the remaining keywords will be displayed in red.
5. If the first instance of your keyword is not the page you are looking for, you can continue the search through the document by clicking the magnifying

glass with the arrow next to it. This will move you to the next instance of your keyword.



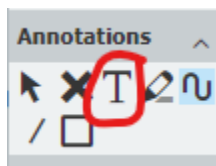
NOTE: You may wish to use a keyword that is more unique to the page you are searching for as broad keywords will result in multiple instances.

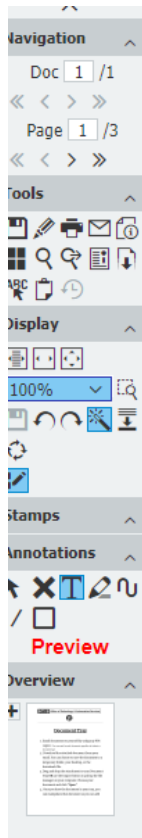
-Using the Annotation Tools

The annotation tools can be used to create notes or to block out information on a document. These notes can be kept as internal or shared depending on the need.

NOTE: This option is not available for users with view only access.

1. To use the text window, click on the letter “T” within the Annotations window and then click anywhere on your document. This will allow you to add a text note on your document. You can also change the font size/style as well as the color by clicking “Preview”.



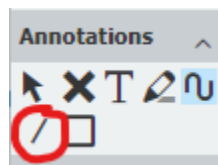


Text Window Tool

Document Tray

1. Email documents to yourself by using any PPS copier. *You can email several documents regardless of student or document type
2. Download the attached document from your email. You can choose to save the document to a temporary folder, your desktop, or the downloads file.

2. The Draw Line feature allows you to either draw a small line used for a signature or you can make the line larger to block out or redact information. To use this function, click on the slash line under the Annotations window. You will have the option to change the color and the size once you've clicked the option. Click anywhere on your document and drag your mouse to create the line.



1/1 > << < 1 /3 >> Document Tray Steps

Navigation
Doc 1 /1
Page 1 /3

Tools

Display
100%

Stamps

Annotations

Overview

OTIS Office of Technology & Information Services

PPS

Document Tray

1. ~~Email documents to yourself by using any PPS copier.~~ *You can email several documents regardless of student or document type
2. Download the attached document from your email. You can choose to save the document to a temporary folder, your desktop, or the downloads file.
3. Drag and drop the attachment to your Document

Scanning New Records to DocuWare

*Records Management will handle the upload of paper cumulative files that accompany new students to the PPS district from outside districts. When you receive new student cumulative files, please PONY those to Records Management for uploading. Anything collected by the school after Records has uploaded the out of district cumulative file is the responsibility of the school's office staff to scan and upload to DocuWare.

-Cover sheet method

DocuWare does not require any special equipment to upload student records. Each school is set up with custom scanning buttons on the school's multi-function copier that, when used, will send a scanned document directly to the DocuWare server where it will be automatically processed and uploaded.

For each record that needs to be uploaded, you will need to fill out **one of two cover sheets** that can be located on the PPS website under the Records Management Department tab. These cover sheets are fillable PDFs. Student information **MUST** be typed for the system to process and file the document properly. Handwritten information on the cover sheet will not work and the system will be unable to file the document properly.

If you have new paper records to digitize:

1. Choose either the **Student Records cover sheet** or the **School Records cover sheet** and open the appropriate PDF.
2. Fill in the Student ID and Date of Birth in the spaces provided.
3. Choose your document type from the drop down menu based on the options from the list below. The document type code will be a letter/number combination.

Student Record Cover Sheet

Student ID

Student DOB (ex: mm/dd/yyyy)

[123456]

[10/10/1999]

Document Category (A-G)

Document Type (2-22)

Example: A2

C8 

<p>A. Registration, Enrollment, Transfer</p> <ul style="list-style-type: none"> 2. Student Registration 3. Proof of Residence DO NOT SCAN 4. Proof of Age DO NOT SCAN 5. Supervisory Form 6. Title 10 Form 7. Parental Release 8. School Choice Form 9. Prior School Outstanding Fines/ Fees 	<p>B. Discipline</p> <ul style="list-style-type: none"> 2. Student-Teacher-Parent agreement 3. Student Statement 4. Academic, Behavioral or Police Report 5. Restorative Justice 6. Letter of Hearing for Suspension/Expulsion 7. Community Service Report
<p>C. Student Health</p> <ul style="list-style-type: none"> 2. Authorization for Medication 3. Student Medical Record 	<p>D. Counseling</p> <ul style="list-style-type: none"> 2. Academic Achievement Log 3. Individual Study form

4. Print out the cover sheet and take your document with you to the copier.
5. Place the cover sheet on top of your document and place the stack of paper in the document feeder.
6. On your copier home screen, you will see your designated DocuWare scanning buttons. If you do not see them on the first home screen, you can click the black arrow in the lower right corner of the home screen to move to the second home screen. You should see a button that says “**Student Records**” and one that says “**School Records**”.
7. Depending on which cover sheet you are using, choose the appropriate DocuWare button and press “**START**”. The document will run through the feeder and DocuWare will automatically store what you’ve scanned.
8. Follow the instructions for any other documents you may need to upload to the system.

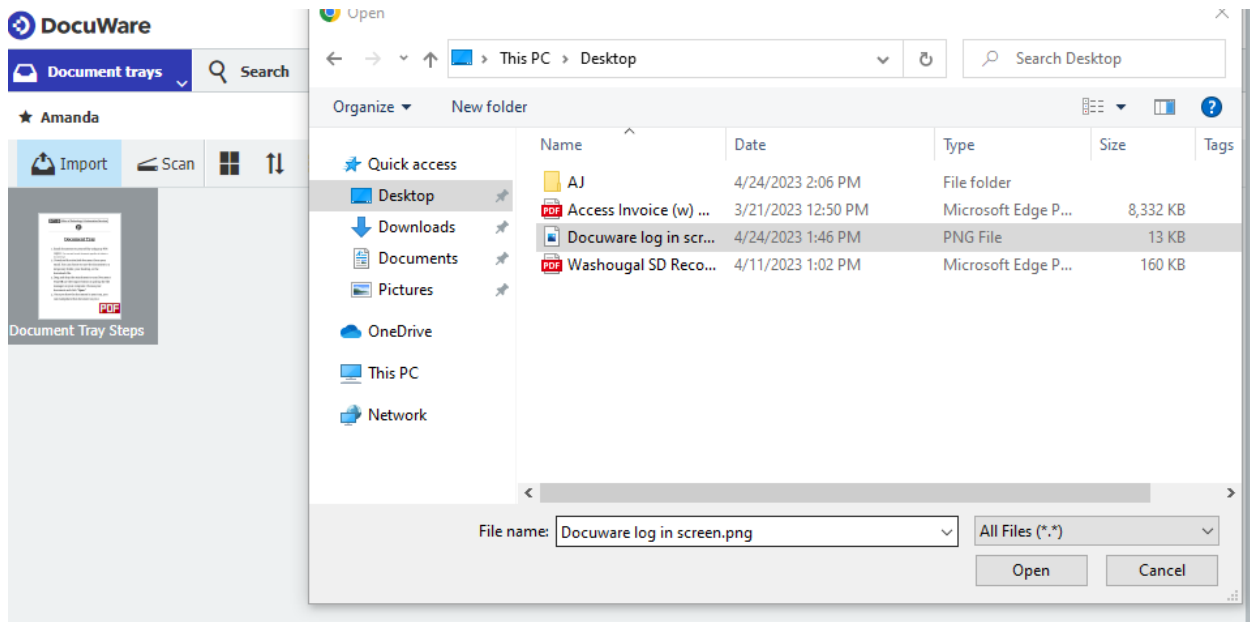
NOTE: Each document will need a separate cover sheet. For example: One cover sheet for Student Registration, one cover sheet for Proof of Immunization etc.

-Document Tray method

The Document Tray is a method of scanning documents without the use of the cover sheet and is a feature within the DocuWare system. If you choose to utilize this method for scanning documents, a personal tray will be created for you by the Records Management team. Please email records@pps.net to have your tray created if you do not already have one.

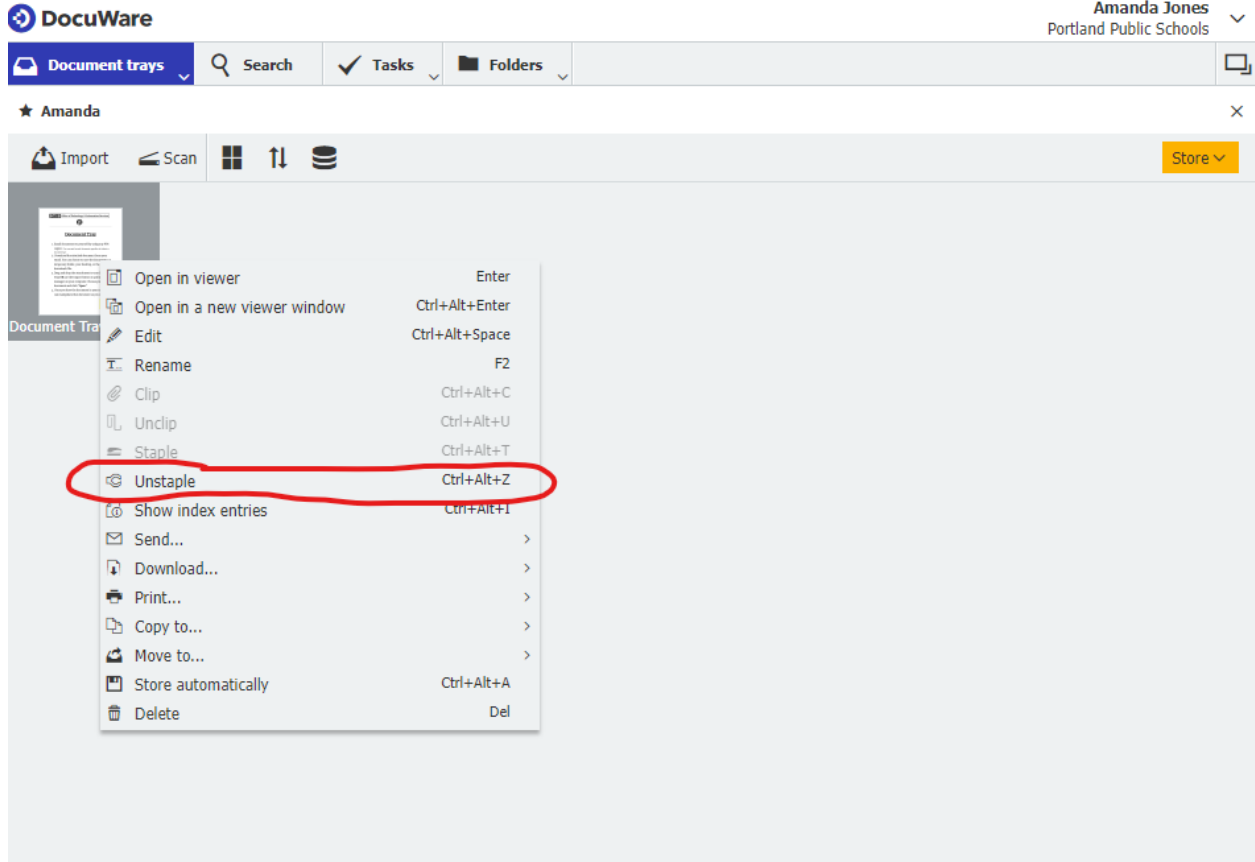
To use the Document Tray:

1. Email documents to yourself by using any PPS copier. You can email several documents to yourself regardless of student or document type.
2. Download the attached document from within your email. You can choose to save the document to a temporary folder, your desktop, or simply leave it in the Downloads folder.
3. Drag and drop the attachment to your Document Tray **OR** use the Import button within the tray to pull up your computer's file manager. If you have opened your file manager, choose the appropriate document and click "Open"

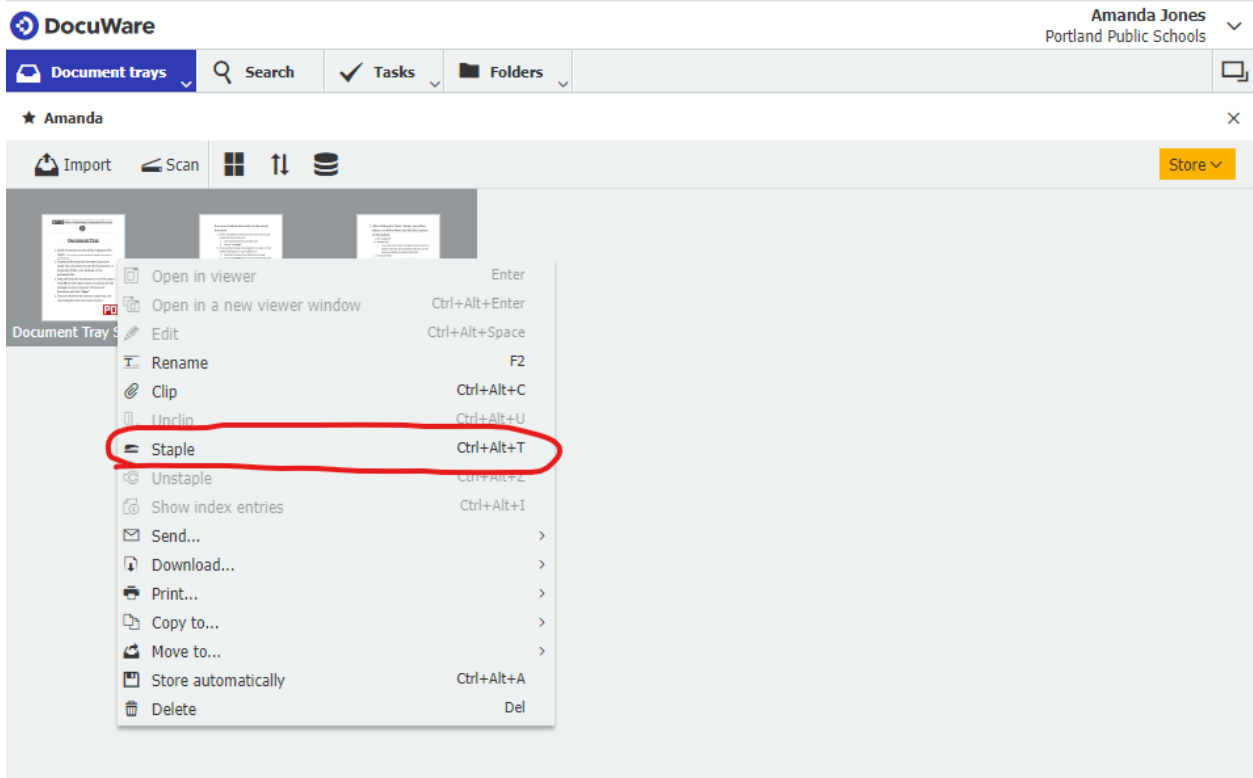


4. Once you have a document in your Document Tray, you will have the ability to manipulate the document so you can add the appropriate student information to the appropriate document.

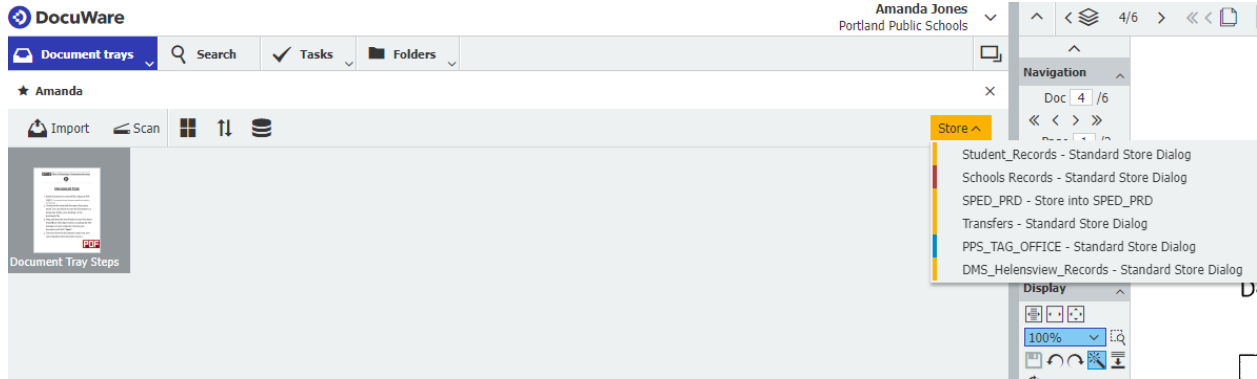
- a. If you've dropped an attachment into your Document Tray that has several student's documents all together:
 - i. Select your document and right click then choose "**Unstaple**"



- b. If you need to put pages back together so they appear as one document once stored to the system (ex: Pages 1 & 2 go together and pages 3 & 4 go together etc.)
 - i. Select the page you want to see as page 1 (A document will have a dark gray box around it when selected)
 - ii. Hold the **CONTROL** key on your keyboard and start selecting pages in the order you want them to be in.
 - iii. Hover your cursor over page 1, right click, and choose "**Staple**"

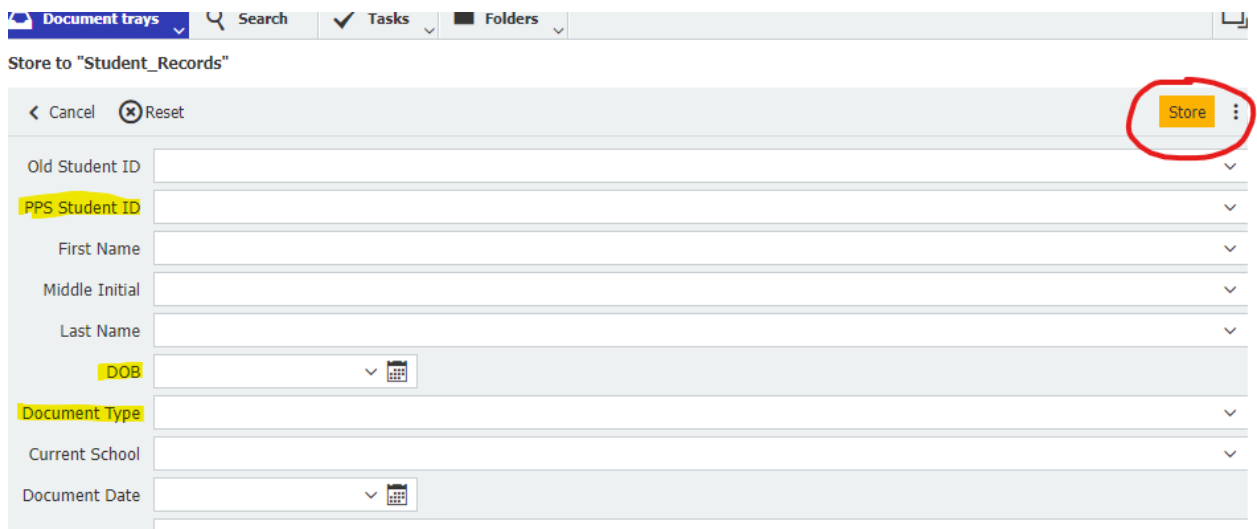


5. When you have finished “Unstapling” and/or “Stapling” pages in your Document Tray, you can click the orange “Store” button in the center of the screen to move your document to the next step. Make sure the orange button says “Store” and **NOT** “Create Data Record”. Note: At this point, you can choose to select one document at a time or you can select multiple documents to move to the next step.
6. When you click the “Store” button, it will ask you what cabinet you’d like to store your document to. Choose either “**Student_Records - Standard Store Dialog**” or “**Schools Records - Standard Store Dialog**” depending on where your document needs to be stored. 99% of documents will be stored in the “Student Records” cabinet.



7. After clicking the orange “Store” button and choosing the appropriate cabinet to store to, you will be taken to the indexing window where you will be required to add three pieces of information.
 - a. PPS Student ID
 - b. Student DOB
 - c. Document Type

Note: when adding the DOB, you only need to enter two digits for the month, two for the day, and two for the year. Do not enter any slashes or dashes for the DOB.



8. Once you have entered the required information, click the orange “Store” button once more.
9. After you’ve clicked the “Store” button, you will either be taken to the next document in line that will need student information or it will return you to the Document Tray.

Procedures for Paper Records After Digitization

-Check Scanned Records Report

There is a way for you to check to see whether your documents uploaded to the system successfully. This is called the “Check Records Report”. To find and use this report:

1. Go to PPS.net and find Records Management under the Departments tab
2. From the main Records Management page, you will see a tab to your left that says “DocuWare Information and Support”.
3. When you click that tab, you will then see an option that says “Check Records Report”
4. This will take you to a page with instructions on how to run the “Check Records Report”.
5. You will click the blue link that says [THIS REPORT](#)
6. You will be asked to choose your school from the drop down as well as choose a date or date range for the report. You can enter a single day or a range of dates.

The report will generate a list of all documents scanned by your school for the selected date or date range. It’s best to search for your scanned documents the day after you’ve scanned them to allow the system time to fully update all information. If your document shows up on this list, that means it has been stored to DocuWare properly and is searchable/viewable by appropriate users. You may put the hard copy in the district provided secure shred bin.

If your document does not show up on this list, there may have been an error in the student information entered. Your document is still in the system but will need Records Management to correct the error and/or add missing information so the document can be searched/viewed by appropriate users. DO NOT destroy the hard copy yet.

Please try to search for your documents at least a couple times before reaching out to Records Management for assistance. Records Management does go into

the system regularly to locate documents that have incorrect or missing information. We fix the issue so the document can then be searched and viewed by appropriate users.

-Secure Shredding

Records Management handles the contract for the district's secure shredding. You should have one or multiple secure shredding receptacles. These are to be used for documents that have been uploaded to DocuWare or other sensitive information that is no longer needed by the school/district and has no legal retention period, but cannot be disposed of in the garbage. If you have any questions about what should or should not go into the secure shredding bins, please reach out to Records Management for assistance.