

DocVault

Student Electronic Cumulative Files



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Introduction to DocVault

School staff spends an excessive amount of time copying, printing, correlating, storing and retrieving student records and documents when using a paper-based cumulative folder system. Mountains of paperwork stored in paper folders and filing cabinets tend to fill offices and warehouses —usually for decades.

DocVault changes all of that. DocVault is our new document management software, which enables us to store student records electronically and provides secure access from virtually anywhere. Files no longer need to be physically moved whenever a student changes schools, teachers or graduates. And plus, it's easy to use.

Basic Features:

- Access DocVault
- Log On to DocVault
- Search for a record
- View a record
- Search within a document

Accessing DocVault

To access DocVault:

1. To access DocVault locate the CCPS Applications icon on your desktop.
2. Double-click the icon to display the Zenworks window.
3. Under General Software, locate the DocVault icon.



Note: To add a shortcut to your desktop, simply drag the docvault icon from the Zenworks window to your desktop.

4. Once you double-click the docvault icon, the student cumulative records login webpage will open using your default web-browser.

Please note that **Firefox is the recommended browser for this application.**

Logging into DocVault

To login to DocVault:

1. Enter your current network username and password. This is the same username and password you use to login to your computer. The login name (username) must be in all **lowercase** letters.
2. Press enter or Click the login button in the lower right corner.

A screenshot of a web browser window showing the login page for 'Student Electronic Cumulative Records'. The page has a white background with a blue border. At the top, the title 'Student Electronic Cumulative Records' is displayed. Below the title, there are four input fields: 'Login Name:' with the text 'cpluss' entered, 'Password:' with a masked password '*****', 'Repository:' with a dropdown menu showing 'ADHRepository', and a checkbox labeled 'Remember my credentials'. At the bottom left, there is a link for '[+] More Options'. At the bottom right, there is a 'Login' button. A small question mark icon is visible in the bottom left corner of the page.

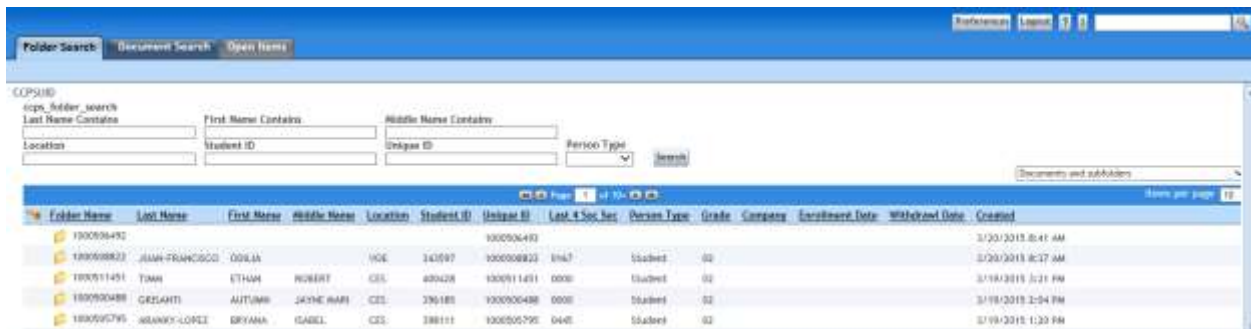
If you are unable to login, notify the Technology Help Desk via email (helpdesk@collierschools.com) for further assistance.

DocVault Interface

Once you have logged into DocVault, the Folder Search homepage will display. DocVault's interface consists of tabs, areas, lists, folders, subfolders, and documents.

Let's take a moment to examine the DocVault interface.

1. The **Folder Search and Document Search** tabs are used to search for a record or document.
2. Search terms are entered in the **Search Criteria Input Area**
3. Search results display in the **Search Results List Area**
4. Opened documents display under the **Open Items Tab**



Locating a document in DocVault is as easy as 1-2-3

1. Enter search criteria
2. View search results
3. Open the root folder
4. Select a subfolder
5. Select a document

Searching for a Record

Search Tabs

You will utilize the folder search and document search tabs to search for a document.

Folder Search

The Folder Search tab allows you to input search criteria and displays search results using the root folder and subfolder filing hierarchy. In other words, you will have to navigate through the root folder and subfolder prior to viewing available documents.



Document Search

The Document Search tab allows you to input search criteria and returns search results in document format only. Root folders and subfolders are not present.

The screenshot shows a web interface with three tabs: "Folder Search", "Document Search", and "Own Items". The "Document Search" tab is active. Below the tabs are four input fields: "Document Text Contains", "Last Name Contains", "First Name Contains", and "Middle Name Contains". Below these are "Location", "Student ID", "Unique ID", and "Person Type" (a dropdown menu). A "Search" button is on the right. Below the input area is a table with the following data:

Document Name	Subject	Last Name	First Name	Middle Name	Location	Student ID	Unique ID	Last 4 Soc Sec	Grade
Document for: 1000512613 Dated: ...		MARTINEZ-VILLA	ZITLALIT		PCR	401163	1000512613	0000	02
Document for: 1000512613 Dated: ...		MARTINEZ-VILLA	ZITLALIT		PCR	401163	1000512613	0000	02

Both tabs consist of a search criteria input area and search results list area.

Search Criteria Input Area

The Search Criteria Input area is where the search truly begins. This is where you enter your search criteria (such as Last name, first name, or student ID, etc.) to search for a specific student record.

The screenshot shows a form titled "CCPSUID" with a sub-label "ccps_folder_search". It contains four input fields: "Last Name Contains", "First Name Contains", "Middle Name Contains", and "Location". Below these are "Student ID", "Unique ID", and "Person Type" (a dropdown menu). A "Search" button is on the right.

Prior to searching for a student record, you should always ask yourself

- Does the student meet DocVault criteria?
- Is this student enrolled at your school?

Note: You will only be able to view records for students who are enrolled at your assigned school.

Entering Search Terms

Before you begin to search gather some key pieces of information about the student. For example, the student's ID number is a sure identifier. If the ID number is not available, then the correct spelling of the students first and last name with a date of birth would suffice.

Remember, be selective with search terms. Utilize the Student ID# or Unique ID# to get the best results. **It is not necessary to fill in every field.**

You can search for a student's record by name, ID, or unique ID.

Name Search (Last and/or First)

To search by Last name and/or First Name

1. Enter a couple letters of the last name and a couple letters of the first name in CAPS.
2. Click the search button or press enter.

Note name search criteria (first, last, or middle) MUST BE ENTERED IN ALL CAPS. No search results will be found if specified letter casing (CAPS) is not used.

CCPSUID
ccps_folder_search
Last Name Contains: DEMO
First Name Contains: RES
Middle Name Contains:
Location:
Student ID:
Unique ID:
Person Type:
Search

Student ID Search

To search by Student ID number

1. Enter the 6-digit student ID number in the Student ID field.
2. Click the search button or press enter.

The student ID number can be obtained from our current student system.

CCPSUID
ccps_folder_search
Last Name Contains:
First Name Contains:
Middle Name Contains:
Location:
Student ID: 377639
Unique ID:
Person Type:
Search

Unique ID Search

Each student is assigned a 10-digit unique ID number. The unique ID is student specific and is only referenced or used within DocVault. It is not available/accessible elsewhere and would normally be provided by a Records Specialist.

To search by Unique ID

1. Enter the 10-digit Unique ID number in the Unique ID field.
2. Click the search button or press enter.

CCPSUID
ccps_folder_search
Last Name Contains:
First Name Contains:
Middle Name Contains:
Location:
Student ID:
Unique ID: 1000439680
Person Type:
Search

Viewing Your Search Results

Search Results List

Your search results will display in the search results list area. Here information is displayed using columns and rows and organized using root folders, subfolders and documents.

Folder Name	Last Name	First Name	Middle Name	Location	Student ID	Unique ID	Last 4 Soc Sec	Person Type	Grade	Company	Enrollment Date	Withdrawal Date	Created
1000500488						1000500488							3/19/2015 2:04 PM
1000505795						1000505795							3/19/2015 1:20 PM
1000499505						1000499505							3/19/2015 11:42 AM
1000510765						1000510765							3/19/2015 10:52 AM
1000510927	ALVAREZ	EMELY		SPE	400123	1000110817	0000	Student	00				3/19/2015 10:08 AM
1000506513	GARZA	LYNHETTE	HANEL	VCE	331048	1000506513	0852	Student	01				3/19/2015 9:39 AM

What does this really mean?

- Rows display a student’s root folder, subfolder, or documents
- Columns display available metadata or information about the student.
- Results can be sorted by clicking on any of the column headers.

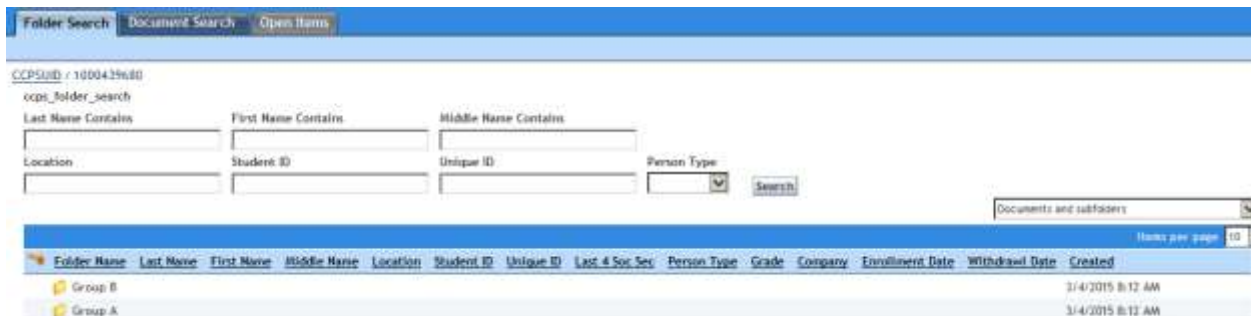
Folders, Subfolders, and Documents

An electronic student record consists of a root folder, subfolder, and documents. A root folder contains subfolders and subfolders contain documents.

Root Folder – Each and every student in our student system will have a root folder listed in DocVault, regardless if they meet DocVault criteria or not. The root folder contains all subfolders such as Cat A, B, ESE, ELL, etc.

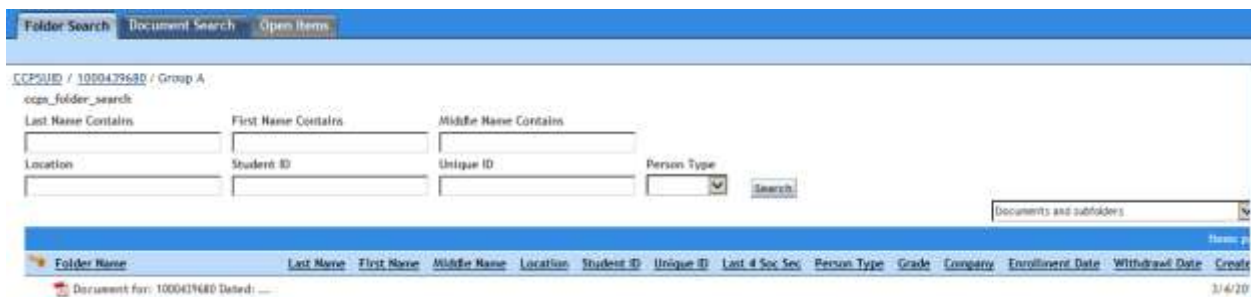


Subfolders – Subfolders are created based upon the addition of contents for the specified section. They contain individual documents pertaining to the selected subfolder. For example, the Group A folder may contain supporting documents for registration, certificate of birth, immunizations, etc. A subfolder will not be listed if documents have not been scanned into it.



Subfolders Included but not limited to: GPA, GPB, MED, LGL, 504, ELL, ESE, PSY, ALT, GFT, PRO, BEN

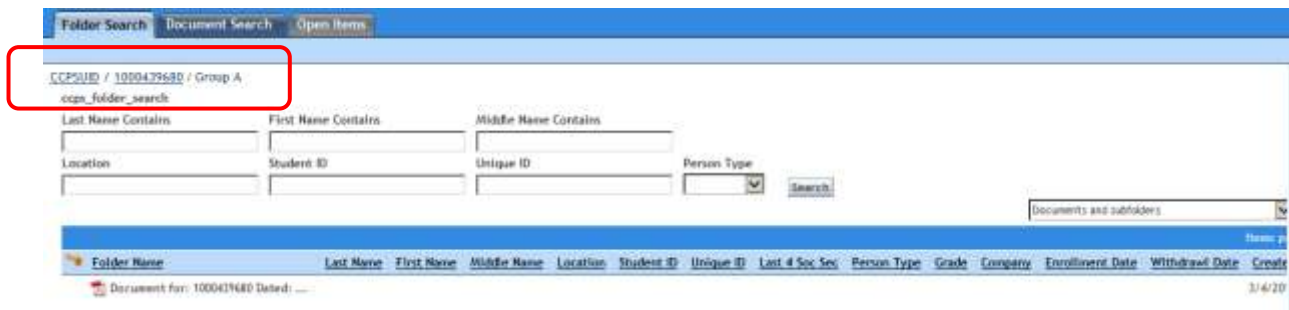
Documents – Any paperwork added to a student electronic record is scanned or electronically uploaded into DocVault by our Records Department. Documents are in PDF file format and searchable.



Breadcrumbs

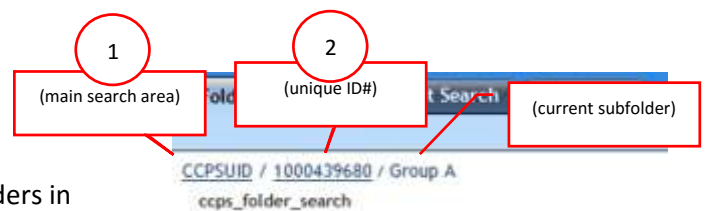
As you open folders and subfolders, the folder breadcrumbs will appear in the upper left corner of the search criteria area. **Breadcrumbs** help identify where you are within the **folder structure**.

Breadcrumbs are available dependent upon the selected folders and subfolders.



Breadcrumbs can be used to maneuver between sections of the electronic cumulative folder.

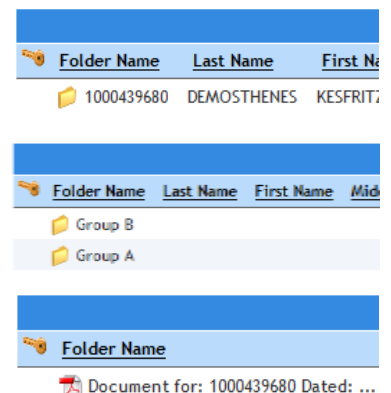
1. Click **CCPSUID** return to the main search criteria area to search for another student's record.
2. Click the **UNIQUE ID#** to view other available subfolders in the current student's record.



Viewing a Document

To view a document:

1. Double-click the root folder to display the available subfolders.
2. The folder tree will refresh and display the available subfolders in the search result area.
3. Double-click the subfolder to view its content documents.
4. The content documents will display in the search result area.



Opening a Document

To open a document:

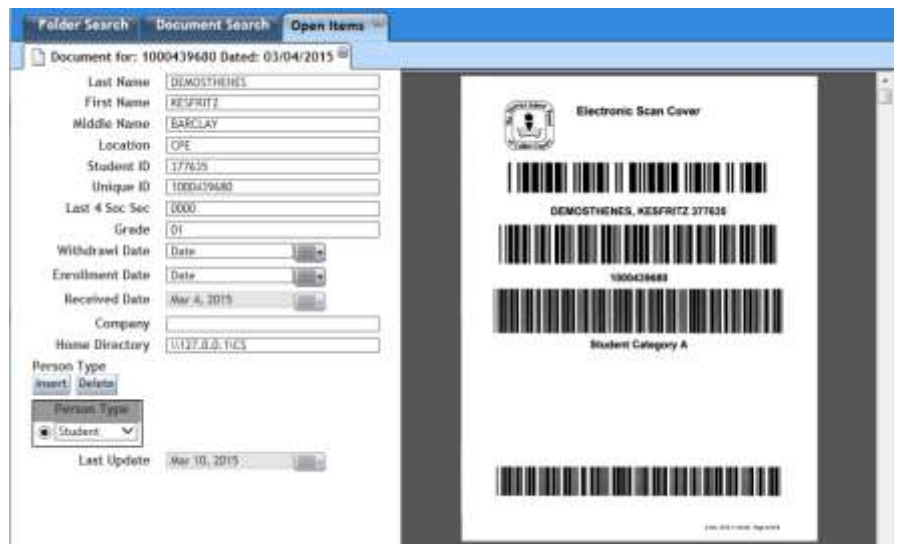
1. From the search result list, select the document you want to view and Click Open.
- OR**
2. Double-click on the document you want to view.



Open Items Tab

Documents will open in the Open Items tab.

- The left side of the window displays the metadata of the document you are viewing.
- The right side of the window displays the actual document content. Documents are displayed in searchable PDF file format.

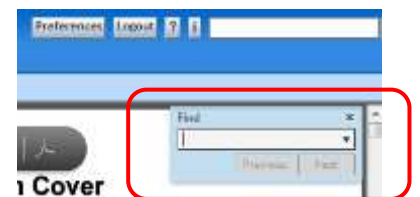


Searching Document Content

A quick way to locate a specific document (i.e. birth certificate, etc.) within the open items window is by searching the PDF document content.

Basic Search

1. Press the Ctrl + F key on your keyboard simultaneously. A search box will display in the upper right corner of the screen.
2. Type the keyword or phrase you want to search for in the search box.

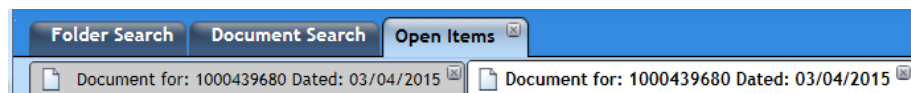


Note: Be selective about keywords and phrases. For example, if you are searching for a birth certificate. Try the keyword/phrase "certification of birth".

3. Press Enter. Use the small left and right arrows in the blue search box to skip to the previous or next instance of the specified keyword/phrase.

Opening Multiple Documents

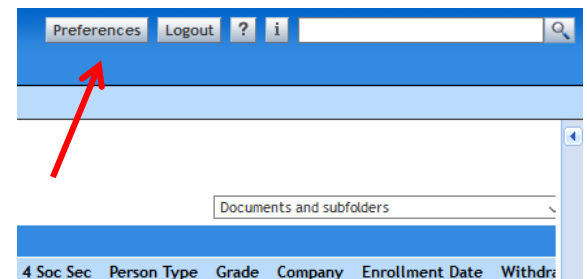
Each time you open a document from the search results list area, it will open in the Open Items tab. You can have multiple documents open at once.



To avoid confusion, it is recommended that you close items prior to performing another search or opening other items.

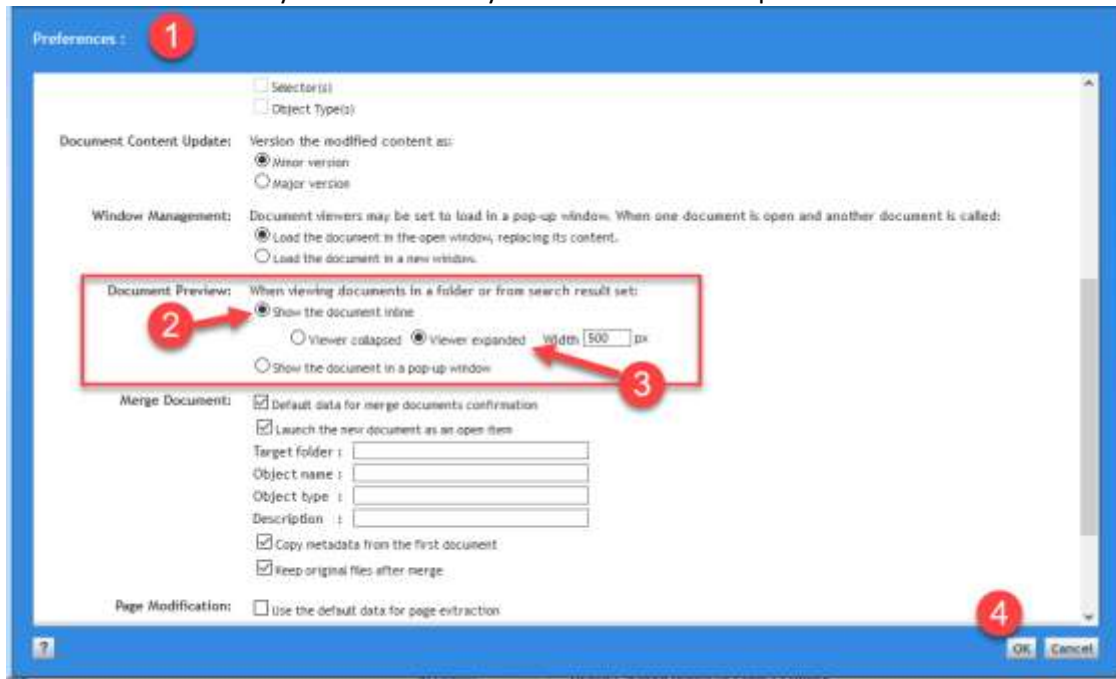
Viewing Documents using Inline Preview

The default document display is popup window, but you may find it more convenient to display documents using inline preview window. This will eliminate the need to double-click on each document to view it.



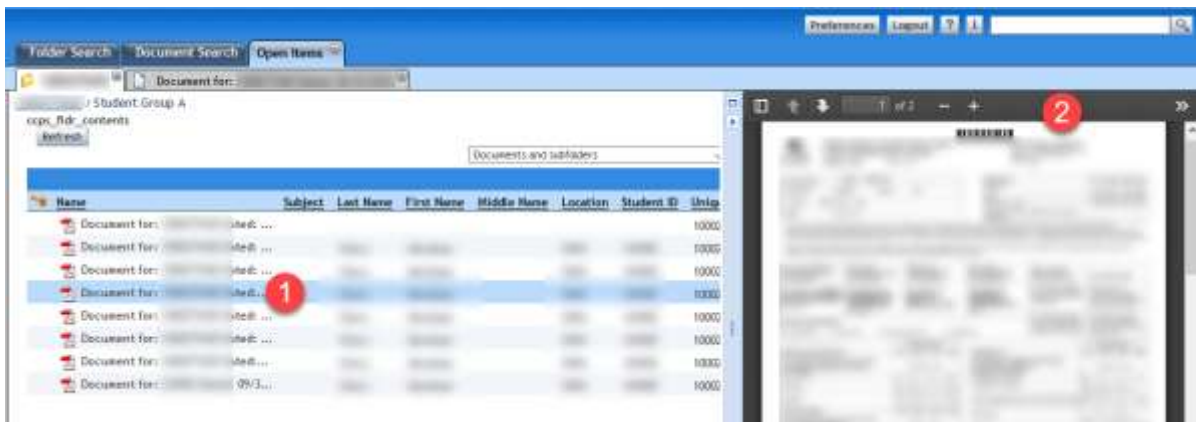
To set the preference:

1. Click the Preferences button in the upper right-hand corner of the screen.
2. The Preferences window will display.
3. Under Document Preview, select Show Document Inline.
4. Select View Expanded.
5. Click Ok. Note: You may have to refresh your screen to see the preview window.



To View the Document in Inline Preview:

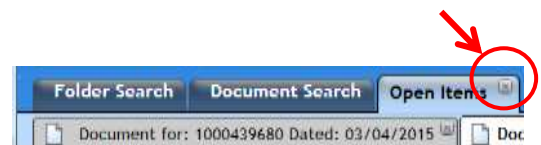
1. Select the PDF document.
2. The Document will display in the preview window to the right of the page.



Closing Open Items

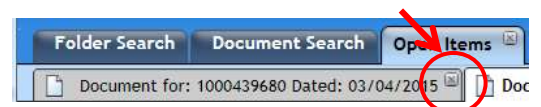
To close all open items:

1. Click the x in the upper right corner of the Open Items tab.



To close the current open item:

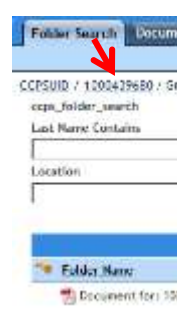
1. Click the x in the upper right corner of the sub-tab.



Continuing a Search

The continue a search within the current students folder

1. Click on the folder search tab.
2. Click the Unique ID number breadcrumb link.
3. The subfolders for the current student will display.



Starting a New Search

Keep in mind before you start to search for another students record, you have to put the current students record back on the shelf. In other words, you will need to close the current students record prior to initiating a new search.

To start a new search:

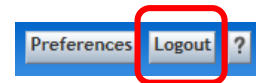
1. Click on the folder search tab.
2. Click the CCPSUID breadcrumb link.



Logging Out of DocVault

The log out of DocVault:

1. Click the Logout button in the upper right corner of the window.



Note: Your docvault session will timeout after 5-10 minutes of inactivity.

Reminders

Accessing

- CCPS Applications icon on desktop/general software
- Use INTERNET EXPLORER.

Logging On

- Do you meet DocVault access criteria?
- LogIn Name should be in all lowercase letters.
- Use your Network Username and Password.

Searching

- Folder Search Tab
- Does student meet DocVault criteria?
- Is student enrolled in your school?
- Search criteria entered in text fields must be in CAPITAL LETTERS.
- The Student ID# is a sure identifier.

Viewing

- Open Items Tab
- File hierarchy: Root folder/subfolder(s)/document(s)
- Searchable PDF file format.
- Ctrl + F to search within an open document.