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| **eDM File Manager** | |
| Slide 1  **Viewer will “Select” or “Click” as prompted during the simulation.** | Welcome to the guided practice. In this activity we are going to explore the TSDS eData Manager. As a reminder eDM is the component in the end user process that actually loads data in the ODS. Specifically we are going to practice navigation of the File Manager, uploading an XML interchange file, and working through the validation. We access eDM through the TSDS Portal so the first step is to **log in to TEAL**. **Click on the Username**. You would enter you TEAL username here. As this is a demo, let’s enter a generic login. **Type username**, all lower case, then press enter. Now let’s **enter the word password** in the Password box, then press enter. Then **click Login**. |
| Slide 2 | On this screen we can see the applications that we have access to as well as our roles. What you specifically see here will depend on the roles and access level assigned to you through TEAL. Let’s go ahead and **click on the TSDS Portal** link. |
| Slide 3 | Now we are on the homepage of the TSDS Portal. The options available to you on this screen may differ depending on your roles. eDM is a under the Manage Data Loads button. Let’s **click on that option.** |
| Slide 4 | And here we are on the homepage of the TSDS eData Manager. When we log in this is landing screen. The TEA System Administrator will periodically post System Messages for the LEA users generally regarding collection dates or upcoming maintenance windows. In this section underneath System Messages, all the open collections are listed. On this screen all throughout the application, there is a link to contact sensitive help. Finally, we have the menu on the left side of the screen. In this guided practice, we will be using the Interchange Upload and File Manager functions. For the most part, files will automatically be submitted to eDM by the DTU. However, you will periodically have to manually load a file. This is also a good way to understand the data flow process within eDM. To get started, click on Interchange Upload. |
| Slide 5 | First we need to **select the correct collection**. As you log in over the course of the year, the choices under the Interchange Collection menu will change to reflect the collections that are available to you. **Open the menu**. Our demo is configured for Fall 1 2013, so **select that from the collection menu**. Now that we have selected the correct collection, we need to **browse** for the target XML interchange files. We see that we can upload up to 9 files at a time. Note that I am using IE. The screen tend to render differently when I use another web browser. Let’s go ahead and click Browse. |
| Slide 6 | I have already chosen the target file so go ahead and **click Open**. |
| Slide 7 | We can see that file we selected is ready to upload. Remember that all files must meet the TEDS file naming convention or eDM will reject the file. Go ahead and **click Upload**. |
| Slide 8 | We can see that file has been received and is in the processing stage. We can also see that the XML interchange file was assigned a file ID – 4660. If we want to limit the number of files being displayed, we could use the File Status or Date Range filters. If we were looking for one specific file, we could use the search tab. However, let’s check on our demo file. **Click on the Blue Refresh button** on the upper righthand side on the screen to update the file status. We can see that our file processed quickly and failed the pre-load validation based on the status icon. Let’s **click on the magnifying glass** to view the file details. |
| Slide 9 | We can see the validation process statistics as well as the failed validation status. Further down the screen under File Contents we can see the error file that was generated by the validation process. Let’s go ahead and **click on the View File Content** icon. |
| Slide 10 | We can see from the XSD error file that the value A763685241 is not facet-valid with respect to the pattern [1-9] {10} for type Unique State Identifier. This means that the value A763685241 does not meet the expected pattern of the 10 digit value made up numeric characters 1 through 9 for the Unique State Identifier. Ok, let’s try another file. Let’s **Cancel** to navigate back to File Manager. |
| Slide 11 | Let’s **select Upload Interchange** from the menu and try another XML interchange file. |
| Slide 12 | **Open the Collection** menu and **select Fall 1 2013** from the menu options again. **Click on** **Browse** to select another XML interchange file. I selected the same file we just tried to upload before. Go ahead and **click Open** and let’s see what happens when we try to upload the file. And then **click Upload**. |
| Slide 13 | This time we got an error message. The system is telling us that the file already exists in the system. I mentioned earlier that the file needs to meet the TEDS naming convention in order to be submitted to the system. Likewise, the file needs to have a unique name. The date/time stamp should be different for each file. |
| Slide 14 | Let’s go back and try one more file. **Click on Interchange Upload** again. |
| Slide 15 | **Open the Collection** menu and **select Fall 1 2013**. **Select Browse** to locate the target file. |
| Slide 16 | I have already selected the target XML interchange file so just **click Open**. Now **click Upload**. |
| Slide 17 | Now the file has completed running against the validations and the status is Validation Ok. Which means that the file passed all pre-load validations. Remember that we can only process files with status Validation Ok. **Select our demo XML interchange file 4661** by **selecting the Check Box**. Now **select Add to Batch**. We are only going to add our demo file but you could add multiple files at this point by checking the box next to other files with the status of Validation Ok. |
| Slide 18 | Now that we have selected the file and added it to the Batch, **click on View Batch**. |
| Slide 19 | On the View Batch screen, we can review the files that we are sending to Batch Manager. We can also choose to add Comments to help with administratively managed batches. It is recommended that you add some commentary here to help you track the batches. I added a brief note for demo purposes – Administrative notes. Now that we entered comments, let’s select **Process Batch**. It doesn’t matter if you choose the button on the top or the bottom of the screen. As a note, it’s not necessary to check the box next to the file again. Go ahead and **click Process Batch**, the top one, just for today’s exercise. |
| Slide 20 | And not you will see that the file has been batched and sent along to Batch Manager. We will come back to this point in the process after we reconvene and learn more about what will happen in Batch Manager. Thank you for your time. |