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| **TSDS PEIMS Interactive Overview** | |
| Slide 1  **Viewer will “Select” or “Click” as prompted during the simulation.** | Welcome to the online training for the TSDS PEIMS. After completion of this session, you will be to promote data from the ODS to the TSDS PEIMS Data Mart, prepare and finalize the data for submission, approve the data submission for the LEA, accept the data submission for the ESC. Now let’s take a guided tour of the PEIMS Data Mart. **Click Promote Loaded Data**. |
| Slide 2 | **Select the school year 2014-2015**. **Select MIDYR**. **Select First. Click Go**. The menu options inside the TSDS PEIMS application are based on the user’s TEAL role and will vary accordingly. We are logged into the application as a Data Submitter and we can see the Data Promotions, Validations, Prepare/Finalize Submission, Access Data, and View Reports tabs. Now let’s specify which data set will be promoted from the ODS to the PDM. **Select the dropdown by Categories**. **Select All Categories.** |
| Slide 3 | Notice that all categories is now in the Subcategories selected box. Also I have typed My Sample Data in the Data Promotion Name text box. **Click Next**. |
| Slide 4 | Review the data promotion details. The user has the ability to cancel or move backwards if the details are not correct. Our promotion looks correct, so let’s **click submit**. |
| Slide 5 | After the data promotion has been processed, the user sees the confirmation message – The promotion request, My Sample Data, has been scheduled. All data promotions will be logged under the Monitor Data Promotions tab. We can see that the promotion for My Sample Data is In Progress. **Click the Refresh button.** |
| Slide 6 | The user can sort the data by clicking on the sort arrow next to the column header, view the details by clicking on the Data Promotion Name, or view error reports by clicking on View under Error Reports. The Status will show as In Progress, Completed, Completed with Errors or Failed. We can see that our status has changed to Completed. Under Error Reports let’s **click View**. |
| Slide 7 | **Hover over Data Promotions**. The LEA data load error screen tells us there are No Records to Display. Our data loaded without errors. **Click Monitor Data Promotions.** |
| Slide 8 | On the Monitor Data Promotions page **click Show Search Criteria**. In the Search Criteria box **select School Year 2014-2015**. In the Collection box dropdown **select MIDYR**. Under Submission **choose First**. Under Status **select All**. **Click Search**. |
| Slide 9 | The search feature allows the user to search for a particular PEIMS submission file and access error reports for that file. Our search has returned our file named My Sample Data file. Now let’s take a look at Data Validations. **Hover over the Validations tab, click Validate Submission Data**. |
| Slide 10 | TSDS PEIMS Validate Submission Data will perform the same functions as the Legacy PEIMS Edit + error reports. The TSDS PEIMS Validate Submission Data will look at the PEIMS business rules and produce fatal and special warning errors. Now we need to specify what data set will be validated. **Select the dropdown by Categories**. The user may select a particular category or all categories. For today’s demonstration let’s **select All Categories**. |
| Slide 11 | The user may select the types of validations the system will perform. In this case we want the system to perform validations for Fatals, Warnings, and Special Warnings. All of the check boxes are selected for you. I have typed My Test Data in the Validation Name text box for you. **Click Next**. |
| Slide 12 | Review the validation details then **click Submit**. |
| Slide 13 | Once your data has been submitted for validations the system will return a status of In Progress, Completed, or Completed with Errors. My test data is In Progress. **Click the Refresh image**. |
| Slide 14 | The status now shows Completed. Once your data has been validated, you can download you validation errors to an Excel file, PDF file, or you can print the file. The column headers are also sortable. **Hover over Validations. Click Validation Rules Severity Count.** |
| Slide 15 | The Validation Rules Count screen will display the number of Fatal records, Warning records, and Special Warning records. Our data is very clean and we have no warnings to display. Now let’s search the data validations. **Hover over the Validations tab; click Monitor Data Validations**. |
| Slide 16 | **Click Show Search Criteria**. We have selected School Year 2014, MIDYR, First Submission, and Status All. **Click Search**. |
| Slide 17 | Under Error Report select View to see the error details. |
| Slide 18 | The Validation Errors by Job screen shows the individual errors. Once again, our data is clean and our file does not have any records to display. The user can click the PDF, XLS, or Print button to download or print the error list. **Hover over Validations, click the Monitor Data Validations tab**. |
| Slide 19 | Under the Data Validation Name column, **click on My Test Data.** |
| Slide 20 | Now we can see the Validation Request Details. On this screen the user will be able to see the Org ID, Category, Subcategory, Validation Request Status, and a count of Fatals, Special Warnings, and Warnings. The user can download a PDF or XLS file or print a copy of this page. The validation errors are displayed by category and subcategory. **Click Back.** |
| Slide 21 | On the right side of the screen, the LEA Validation Errors button allows the user to see all the validations errors for the entire Local Education Agency. Now let’s take a look at the Access Data tab. **Hover over Access Data; click Search Data**. |
| Slide 22 | **Click the dropdown box by Catergories**. **Select the** **Finance category** from the dropdown menu. |
| Slide 23 | **Click the dropdown box by Subcategories**. The subcategories are dependent on the category selection. **Select Actual**. |
| Slide 24 | The appropriate search criteria options will display. The more information you can provide, the more accurate the results will be. In the Fund Code, I have typed 199 and in the Function Code, I have typed 11. **Click Search**. |
| Slide 25 | The matching criteria are now displayed. We can see the dollar amounts for each finance code. |
| Slide 26 | **Click the Prepare/Finalize Submission tab.** |
| Slide 27 | The PEIMS Data Completer can lock out the campuses or schools when they are ready to complete the data submission. At this point the LEA does not want any campus to make changes to the data. This functionality is only associated with the PEIMS Data Completer Role. |
| Slide 28 | Once a category is fatal free the PEIMS Data Completer also has permission to select the category or categories and click verify. This step is optional. I have clicked 4 out of 5 categories. **Click the Check Box next to Education Organization, SSA Organization Association. Click Verify.** |
| Slide 29 | The LEA collection status will now change to Validated. The data status for each category has changed to Verified. |
| Slide 30 | Once the PEIMS Data Completer is satisfied that the data has been verified and is accurate, the user can complete the data submission. **Click Complete.** |
| Slide 31 | The status shows Completion in Progress. Click in the check box to acknowledge that all data included in the submission has been validated and reviewed for accuracy. |
| Slide 32 | The user could cancel the completion if he or she needs more time to review the data. However, for today’s demonstration we will agree that this submission is accurate. **Click Confirm to submit the data.** |
| Slide 33 | I have entered a comment for you. **Click Save**. |
| Slide 34 | The LEA Collection Status now says LEA Data Complete. **Click Exit** to log out of the TSDS PEIMS. |
| Slide 35 | **Click Exit** again to log out of the Portal. |
| Slide 36 | **Click Logout** to exit TEAL. |
| Slide 37 | I am logged in as the PEIMS Data Approver. **Click Prepare and Finalize.** |
| Slide 38 | The LEA Collection Status says LEA Data Complete. At the bottom of the page, we see the Category and Subcategory data status. The Data Status says Verified. |
| Slide 39 | Once all of the data has been reviewed and the LEA Collection Status says LEA Data Complete, the PEIMS Data Approver can mark the data Approved. **Click Approve. Click Ok**. |
| Slide 40 | The Chief Executive at the Local Education Agency, from here forward referred to as the Superintendent, logs into TEAL to sign the Statement of Approval Form (SOA) for the PEIMS submission. This form was formerly referred to as the Superintendent Approval Form (SAF). This approval happens parallel with the ESC acceptance process. If there are problems with the data, the PEIMS Data Approver can reject the file. **Click Confirm Approval.** |
| Slide 41 | I have typed a comment in the comment box for you. **Click Save.** |
| Slide 42 | If the Superintendent needed to request an extension, he or she could do so by clicking the Administration tab and Request Collection Extensions. Only the Superintendent can request a PEIMS submission extension. A district must have extenuating circumstances in order to receive an extension from TEA. |
| Slide 43 | Now I have logged out of TSDS PEIMS, the TSDS Potal, and TEAL. |
| Slide 43 | I have logged back in as the PEIMS Data Accepter. The PEIMS Coordinator at each Education Service Center serves in the PEIMS Data Accepter role. **Click Prepare and Finalize**. |
| Slide 44 | I have selected the School Year, Collection and Submission for you. **Click Go.** |
| Slide 45 | The PEIMS Data Accepter can see the list of LEAs and their PEIMS data submission status by clicking the LEA View button. **Click LEA View**. |
| Slide 46 | Once the data submission has been approved by the Superintendent, the PEIMS Data Accepter can select the district by clicking the check box. **Click in the check box next to Org ID 701603. Click Accept.** I have typed a comment for you. **Click Save.** |
| Slide 47 | Click Confirm. |
| Slide 48 | Now we see the confirmation message which states The Acceptance Process is Complete. The acceptance process for the LEA(s) you selected has been successfully completed. To log out of TSDS PEIMS, **click Exit**. To log out of the TSDS Portal, **click Exit**. To log out of TEAL **click Logout.** |
| Slide 49 | This brings us to the end of our simulation. Thank you for your time. |