The TSDS PEIMS Implementation Plan provides a list of steps to implement TSDS PEIMS.

Official [TSDS PEIMS Rollout Plan](http://www.texasstudentdatasystem.org/WorkArea/linkit.aspx?LinkIdentifier=id&ItemID=25769807223&libID=25769807226) Schedule:

* December 2014 through September 2015 – Early Adopters are expected to submit data for the 2014-2015 Collections to TSDS PEIMS in parallel with their regular submissions to legacy EDIT+.
* August 2015 – Stage 1 – approximately 600 LEAs will begin using TSDS as the system of record reporting the 2015-2016 PEIMS Collections.
* August 2016 – Stage 2 – the remaining LEAs will begin using TSDS as the system of record reporting the 2016-2017 PEIMS Collections.

## For Assistance

* To report an issue, create a TIMS incident ticket and escalate it to Level 2.
* If you have questions about the tasks or dates below, follow up with your TSDS Technical Champion or TSDS PEIMS Champion. TSDS Technical Champion or TSDS PEIMS Champion contact information can be found here:

## <http://www.texasstudentdatasystem.org/TSDS/About/Deployment/Deployment/ESC_TSDS_Champions_1-11/>

## Prerequisites

Before your LEA/ESC implements PEIMS, you must:

* Identify TSDS PEIMS Champions (ESCs) and TSDS PEIMS Stewards (LEAs) and obtain contact information.
* Attend TSDS Training and review the TSDS PEIMS Course Material.
* Review the Field Coordination Network Webinars for TSDS PEIMS Champions providing updates on TSDS-PEIMS for ESCs with Early Adopters here:

<http://www.texasstudentdatasystem.org/TSDS/About/Get_Involved/For_Education_Service_Center_Administrators/>

# Planning Implementation

| **PLANNING** | | **Responsible**  **Role** | **Planned Date of Completion** | **Course/ Resource Reference** | **Questions** |
| --- | --- | --- | --- | --- | --- |
|  | Contact your SIS, HR, and Business vendors and let them know that your LEA will need TEDS-compliant extractions necessary for loading TSDS PEIMS data to the Operational Data Store (ODS). | TSDS Executive Steward/TSDS Executive Sponsor | 2-3 months prior to launch |  |  |
|  | Identify the staff who will act as LEA Data Stewards or TSDS Technical Champions. | TSDS Executive Steward/TSDS Executive Sponsor | At least 1 month prior to ESC Training Date |  |  |
|  | Identify the staff who will act as LEA PEIMS Stewards or TSDS PEIMS Champions. | TSDS Executive Steward/TSDS Executive Sponsor | At least 1 month prior to ESC Training Date |  |  |
|  | **Optional**:  Identify the staff who will act as PEIMS Campus Submitter or PEIMS Campus Approver. | LEA PEIMS Steward | At least 1 month prior to ESC Training Date |  |  |

# TEAL Implementation

| **TEAL ACCESS** | | **Responsible**  **Role** | **Planned Date of Completion** | **Course/ Resource Reference** | **Questions** |
| --- | --- | --- | --- | --- | --- |
|  | Request TEAL Service Account Manager status for designated LEA staff (may already be established if LEA has UID web service account). | TSDS Technical Champion, LEA Data Steward or technical staff at LEA: Recommend a primary and backup | 2 months prior to launch |  |  |
|  | Request TEAL DTU Service Account. | LEA user set up as TEAL Service Account Manager | 2 months prior to launch |  |  |
|  | Request TEAL access for LEA Data Steward and ESC Technical Champion (related roles are ODS Campus Data Loader, ODS Data Loader at <https://pryor.tea.state.tx.us/> | TSDS Technical Champion, LEA Data Steward | 1-2 months prior to launch |  |  |
|  | Request TEAL access for LEA PEIMS Steward and TSDS PEIMS Champion (related roles are PEIMS Campus Submitter, PEIMS Campus Approver, PEIMS Data Completer, PEIMS Data Submitter, PEIMS Data Promoter, PEIMS Data Approver, PEIMS Data Accepter) at <https://pryor.tea.state.tx.us/> | TSDS PEIMS Champion, LEA PEIMS Steward (PEIMS Coordinator), Executive Steward | 1-2 months prior to launch |  |  |

## Definitions: TEAL Access/Permissions for PEIMS

| **TEAL Access Roles** | **Default Permissions\*** | **Job Title (this is only guidance)** |
| --- | --- | --- |
| PEIMS Campus Submitter | Schedule, Promote, Data Search, Roster Search, Validations, Reports, Data Downloads – Campus level data only | Campus PEIMS Clerks |
| PEIMS Campus Approver | Data Search, Roster Search, Reports, Mark CAMPUS Data Ready – Campus level data only | LEA Principal |
| PEIMS Data Sched/Promoter | Schedule, Promote, Data Search |  |
| PEIMS Data Submitter | Schedule, Promote, Validate, Data Search, Roster Search, Data Downloads, Verify Data, Reports |  |
| PEIMS Data Completer | Schedule Promote, Validate, Complete, Data Search, Roster Search, Verify Data, Data Downloads, Lock data, Configure Notifications, Reports | ESC PEIMS Coordinator (TSDS PEIMS Champion), LEA PEIMS Coordinator (LEA PEIMS Steward) |
| PEIMS Data Approver | Approve, Data Search, Roster Search, Request Extension, Reports | Superintendent (TSDS Executive Steward), ESC Executive Director (TSDS Executive Sponsor) |
| PEIMS Data Accepter | Accept, Data Search, Roster Search, Data Downloads, Region-wide Data Downloads, Data Collection Monitor, Reports, Configure Notifications, Access LEA data, Data Collection Monitoring  **Note**: Access LEA data provides the ability to view LEA level data with the above permissions. | ESC PEIMS Coordinator (TSDS PEIMS Champion) |

\*NOTE: TEAL includes both default and optional (“checked” and “unchecked”) permissions. For additional information on optional permissions, log in to TEAL and review the Help documentation.

## TEAL Application Access Request

| **Role** | **Who Needs the Role?** | **Employing Org** | **Requested Org/Other Required Information** | **Notes** |
| --- | --- | --- | --- | --- |
| PEIMS Campus Submitter | For LEA or Level 2 Support usersat specific campuses or performing tasks for a specific campus.  Provides the ability to promote, validate and view PEIMS data and reports for campus level data.  Targeted users: Campus PEIMS Clerks or Level 2 Support Users | LEA or Level 2 Support where user is employed | Campus within LEA (name or nine-digit number; first six digits should match district number)  If user is a Level 2 Support person, this will be different than their employing org since they are requesting access to a LEA. |  |
| PEIMS Campus Approver | For LEA or Level 2 Support usersat specific campuses or performing tasks for a specific campus.  Provides the ability to promote, validate and view PEIMS data and reports for campus level data. They may also mark data ready for PEIMS data collection for their own campus.  Targeted users: Campus Principals or Level 2 Support Users | LEA or Level 2 Support where user is employed | Campus within LEA (name or nine-digit number; first six digits should match district number)  If user is a Level 2 Support person, this will be different than their employing org since they are requesting access to a LEA. |  |
| PEIMS Data Sched/Promoter | For LEA, ESC, or Level 2 Support users*.*  Provides the ability to schedule and promote PEIMS data to the PEIMS Data Mart.  Targeted users: LEA PEIMS Steward (PEIMS Coordinator) or TSDS PEIMS Champion (ESC PEIMS Coordinator) | LEA, ESC or Level 2 support where user is employed | If user is from a LEA, this should match the Employing Org unless the user works at a Shared Service Arrangement (SSA).  If user is from an ESC and loading ESC data, this should match the Employing Org.  If user is a Level 2 Support person, this will be different than their employing org since they are requesting access to a LEA. |  |
| PEIMS Data Submitter | For LEA, ESC or Level 2 support.  Provides the ability to promote, validate and view PEIMS data and reports.  Targeted users: LEA PEIMS Steward (PEIMS Coordinator) or TSDS PEIMS Champion (ESC PEIMS Coordinator) | LEA, ESC or Level 2 support where user is employed | If user is from a LEA, this should match the Employing Org unless the user works at a Shared Service Arrangement (SSA).  If user is from an ESC and loading ESC data, this should match the Employing Org.  If user is a Level 2 Support person, this will be different than their employing org since they are requesting access to a LEA. |  |
| PEIMS Data Completer | For LEA, ESC or Level 2 Support user who completes PEIMS data.  Provides the ability to promote, validate, and view PEIMS data and reports. Also, allows the user to complete a PEIMS data collection for their own organization.  Targeted users: LEA PEIMS Steward (PEIMS Coordinator) or TSDS PEIMS Champion (ESC PEIMS Coordinator), Level 2 Support Users | LEA, ESC or Level 2 Support where user is employed | If user is from a LEA, this should match the Employing Org unless the user works at a Shared Service Arrangement (SSA).  If user is from an ESC and completing ESC data, this should match the Employing Org.  If user is Level 2 Support, this may be different than their employing org if they are requesting access to a LEA. |  |
| PEIMS Data Approver | For LEA or ESC users.  Provides the ability to view PEIMS data and reports. Also, allows the user to approve or reject a PEIMS data collection for their own organization.  Targeted users: Superintendent (TSDS Executive Steward), ESC Executive Director (TSDS Executive Sponsor) | LEA or ESC where user is employed | Same LEA or ESC as the Employing Organization |  |
| PEIMS Data Accepter | For ESC users.  Provides the ability to view PEIMS data, reports, and allows the user to accept or reject a PEIMS data collection for LEAs belonging to the ESC.  Targeted users: ESC PEIMS Coordinator (TSDS PEIMS Champion) | ESC where user is employed | Same ESC as the Employing Organization | If the user has the "ESC Access to LEA Data" permission (checked by default), the application will allow the user to accept/reject collections for LEAs belonging to their ESC. |

# eDM Implementation

| **DATA LOADING (eDM)** | | **Responsible**  **Role** | **Planned Date of Completion** | **Course/ Resource Reference** | **Questions** |
| --- | --- | --- | --- | --- | --- |
| **eDM – Manual Process** | |  |  |  |  |
|  | Use Interchange Upload to load all TSDS PEIMS XML data files.   * May be a zip file | TSDS Technical Champion, LEA Data Steward | During month prior to launch |  |  |
|  | Review any loading errors in the ODS File Manager, using the [eDM Error Dictionary](http://www.texasstudentdatasystem.org/WorkArea/linkit.aspx?LinkIdentifier=id&ItemID=25769818154) . | TSDS Technical Champion, LEA Data Steward | During month prior to launch |  |  |
|  | Repeat steps 1 and 2 until all errors are resolved. | TSDS Technical Champion, LEA Data Steward | During month prior to launch |  |  |
|  | Once errors are resolved (indicated by a green check mark in the File Manager), load data to the Batch Manager. | TSDS Technical Champion, LEA Data Steward | During month prior to launch |  |  |
|  | Review any loading errors in the Batch Manager, using the [eDM Error Dictionary](http://www.texasstudentdatasystem.org/WorkArea/linkit.aspx?LinkIdentifier=id&ItemID=25769818154). | TSDS Technical Champion, LEA Data Steward | During month prior to launch |  |  |
|  | Repeat steps 1-5 until all errors are resolved. | TSDS Technical Champion, LEA Data Steward | During month prior to launch |  |  |
|  | Once errors are resolved (indicated by a green check mark in the Batch Manager), the data has been loaded to the ODS. | TSDS Technical Champion, LEA Data Steward | During month prior to launch |  |  |
|  | Compare data loaded to the ODS against the source systems’ data to verify record counts.   * Record counts can be viewed on the ETL Information tab of the Batch that was processed.   1. Click the magnifier under Action of appropriate batch.   2. Click the magnifier under Action of the appropriate Interchange File.   3. Screen opens on the ETL Information tab. | TSDS Technical Champion, LEA Data Steward | During month prior to launch |  |  |
| **DTU – Automation Process** | |  |  |  |  |
|  | Install the DTU in order to transfer files to TEA. | TSDS Technical Champion, LEA Data Steward | During month prior to launch |  |  |
|  | Download the DTU from the TSDS Portal. Note the following:   * Must be installed on the same server as the Local Staging Area (the directory where LEAs will place their data extracts for loading to the ODS) * Server must be running the Windows Platform operating system * Folder name where the DTU is installed should have no spaces or special characters * User must have a TEAL service account user name and password provided by TEAL Service Account Manager (see section above - TEAL Access) * Do not submit zip files through the DTU, the DTU will zip the files automatically | TSDS Technical Champion, LEA Data Steward | During month prior to launch |  |  |
|  | Transfer files to the ODS using the DTU. | TSDS Technical Champion, LEA Data Steward | During month prior to launch |  |  |
|  | Log in to eDM to review any loading data errors, using the [eDM Error Dictionary](http://www.texasstudentdatasystem.org/WorkArea/linkit.aspx?LinkIdentifier=id&ItemID=25769818154). | TSDS Technical Champion, LEA Data Steward | During month prior to launch |  |  |
|  | Repeat step 3 & 4 until all data errors are resolved. | TSDS Technical Champion, LEA Data Steward | During month prior to launch |  |  |
|  | Compare data loaded to the ODS to the source systems’ data to verify record counts.   * Record counts can be viewed on the ETL Information tab of the Batch that was processed.  1. Click the magnifier under Action of appropriate batch. 2. Click the magnifier under Action of the appropriate Interchange File. 3. Screen opens on the ETL Information tab. | TSDS Technical Champion, LEA Data Steward | During month prior to launch |  |  |

# TSDS PEIMS Implementation

| **TSDS-PEIMS** | | **Responsible**  **Role** | **Fall Submission**  **Start Date** | **Midyear Submission**  **Start Date** | **Summer Submission**  **Start Date** | **Extended Year Submission**  **Start Date** | **Course/ Resource Reference** | **Questions** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **PEIMS** | | | | | | | | |
|  | Using the DTU or eDM, upload all Interchange files to ODS until the data is free from ODS errors.  For additional information refer to eDM Implementation section of this document. | TSDS PEIMS Champion, LEA PEIMS Steward (PEIMS Coordinator) | November 2014 | November 2014 | November 2014 | November 2014 |  |  |
|  | Using the Promote Loaded Data screen in TSDS PEIMS, promote data to PDM.   * If errors are received on promotion, it is due to a database error. Please open a TIMS ticket. | TSDS PEIMS Champion, PEIMS Coordinator, LEA PEIMS Steward | December 22, 2014 | December 22, 2014 | April 15, 2015 | April 15, 2015 |  |  |
|  | Using the Validate Submission Data screen in TSDS PEIMS, validate for PEIMS-specific errors. | TSDS PEIMS Champion, PEIMS Coordinator, LEA PEIMS Steward | December 22, 2014 | December 22, 2014 | April 15, 2015 | April 15, 2015 |  |  |
| **Rectifying Validation Errors** | | | | | | | | |
|  | Correct any validation errors in the source system. | TSDS PEIMS Champion, PEIMS Coordinator, LEA PEIMS Steward | December 22, 2014 | December 22, 2014 | April 15, 2015 | April 15, 2015 |  |  |
|  | Re-load new extract via DTU or eDM.   * Only updated Interchanges will need to be loaded. | TSDS PEIMS Champion, PEIMS Coordinator, LEA PEIMS Steward | December 22, 2014 | December 22, 2014 | April 15, 2015 | April 15, 2015 |  |  |
|  | Re-promote PEIMS data.   * Only updated categories/subcagetories will need to be re-promoted. | TSDS PEIMS Champion, PEIMS Coordinator, LEA PEIMS Steward | December 22, 2014 | December 22, 2014 | April 15, 2015 | April 15, 2015 |  |  |
|  | Re-validate PEIMS data.   * Only updated categories/subcagetories will need to be re-validate. | TSDS PEIMS Champion, PEIMS Coordinator, LEA PEIMS Steward | December 22, 2014 | December 22, 2014 | April 15, 2015 | April 15, 2015 |  |  |
|  | Using the View Reports screen in TSDS PEIMS, generate PEIMS reports to verify data for accuracy. | TSDS PEIMS Champion, PEIMS Coordinator, LEA PEIMS Steward | December 22, 2014 | December 22, 2014 | April 15, 2015 | April 15, 2015 |  |  |
|  | **Optional**:  On the Prepare/Finalize screen in TSDS PEIMS, the PEIMS Data Completer or PEIMS Data Submitter may mark the subcategory as “Verified” to lock the subcategory from further changes. | TSDS PEIMS Champion, PEIMS Coordinator, LEA PEIMS Steward | December 22, 2014 | December 22, 2014 | April 15, 2015 | April 15, 2015 |  |  |
|  | Using the Prepare/Finalize screen, the PEIMS Data Completer should complete the PEIMS collection. | TSDS PEIMS Champion, PEIMS Coordinator, LEA PEIMS Steward | Should begin:  Feb 19, 2015 | Should begin:  March 3, 2015 | Should begin:  June 25, 2015 | Should begin:  Sept 3, 2015 |  |  |
|  | As part of the completion process, the PEIMS Data Completer must check the confirmation checkbox to affirm that the data is accurate.   * The system will automatically run all validations during the completion process. | TSDS PEIMS Champion, PEIMS Coordinator, LEA PEIMS Steward | Should begin:  Feb 19, 2015 | Should begin:  March 3, 2015 | Should begin:  June 25, 2015 | Should begin:  Sept 3, 2015 |  |  |
| NOTE: The PEIMS Data Completer may “lock” the collection at any point during this process so that other roles are unable to overwrite the data. | | | | | | | | |
| **PEIMS Data Approval** | | | | | | | | |
|  | Using the View Reports screen in TSDS PEIMS, generate PEIMS reports to verify data for accuracy. | TSDS Executive Steward/TSDS Executive Sponsor | Should begin:  Feb 19, 2015 | Should begin:  March 3, 2015 | Should begin:  June 25, 2015 | Should begin:  Sept 3, 2015 |  |  |
|  | Using the Prepare/Finalize Screen in TSDS PEIMS, the PEIMS Data Approver can approve PEIMS data.   * Note that the PEIMS collection may be rejected at this point—if rejected, repeat Steps 1-11. | TSDS Executive Steward/TSDS Executive Sponsor | Should begin:  Feb 19, 2015 | Should begin:  March 3, 2015 | Should begin:  June 25, 2015 | Should begin:  Sept 3, 2015 |  |  |
|  | As part of the approval process, the PEIMS Data Approver must view the Statement of Approval (SOA) and confirm. | TSDS Executive Steward/TSDS Executive Sponsor | Should begin:  Feb 19, 2015 | Should begin:  March 3, 2015 | Should begin:  June 25, 2015 | Should begin:  Sept 3, 2015 |  |  |
| **PEIMS Data Acceptance** | | | | | | | | |
|  | Using the View Reports screen in TSDS PEIMS, generate PEIMS reports to verify data for accuracy. | TSDS PEIMS Champion | Should begin:  Feb 19, 2015 | Should begin:  March 3, 2015 | Should begin:  June 25, 2015 | Should begin:  Sept 3, 2015 |  |  |
|  | Using the Prepare/Finalize screen in TSDS PEIMS, the PEIMS Data Accepter at the ESC can accept the PEIMS collection.   * Note that the PEIMS collection may be rejected at this point— if rejected and not approved, repeat Steps 1-11. If rejected and approved, repeat Steps 1-13. | TSDS PEIMS Champion | Should begin:  Feb 19, 2015 | Should begin:  March 3, 2015 | Should begin:  June 25, 2015 | Should begin:  Sept 3, 2015 |  |  |
|  | As part of the acceptance process, the PEIMS Data Accepter must confirm their acceptance. | TSDS PEIMS Champion | Should begin:  Feb 19, 2015 | Should begin:  March 3, 2015 | Should begin:  June 25, 2015 | Should begin:  Sept 3, 2015 |  |  |

# TSDS PEIMS Campus Level Data Implementation - Optional

| **TSDS-PEIMS** | | **Responsible**  **Role** | **Fall Submission** | **Midyear Submission** | **Summer Submission** | **Extended Year Submission** | **Course/ Resource Reference** | **Questions** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **PEIMS Campus Data** | | | | | | | | |
|  | Using the DTU or eDM, upload all Interchange files to ODS until the data is free from ODS errors.  For additional information refer to eDM Implementation section of this document. | PEIMS Campus Submitter | Determined by LEA | Determined by LEA | Determined by LEA | Determined by LEA |  |  |
|  | Using the Promote Loaded Data screen in TSDS PEIMS, promote data to PDM.   * If errors are received on promotion, it is due to a database error. Please open a TIMS ticket. | PEIMS Campus Submitter | Determined by LEA | Determined by LEA | Determined by LEA | Determined by LEA |  |  |
|  | Using the Validate Submission Data screen in TSDS PEIMS, validate for PEIMS-specific errors. | PEIMS Campus Submitter | Determined by LEA | Determined by LEA | Determined by LEA | Determined by LEA |  |  |
| **Rectifying Campus Data Validation Errors** | | | | | | | | |
|  | Correct any validation errors in the source system. | PEIMS Campus Submitter | Determined by LEA | Determined by LEA | Determined by LEA | Determined by LEA |  |  |
|  | Re-load new extract via DTU or eDM.   * Only updated Interchanges will need to be loaded. | PEIMS Campus Submitter | Determined by LEA | Determined by LEA | Determined by LEA | Determined by LEA |  |  |
|  | Re-promote PEIMS data.   * Only updated categories/subcagetories will need to be re-promoted. | PEIMS Campus Submitter | Determined by LEA | Determined by LEA | Determined by LEA | Determined by LEA |  |  |
|  | Re-validate PEIMS data.   * Only updated categories/subcagetories will need to be re-promoted. | PEIMS Campus Submitter | Determined by LEA | Determined by LEA | Determined by LEA | Determined by LEA |  |  |
|  | Using the View Reports screen in TSDS PEIMS, run PEIMS reports to verify data for accuracy. | PEIMS Campus Submitter | Determined by LEA | Determined by LEA | Determined by LEA | Determined by LEA |  |  |
|  | **Optional**:  On the Prepare/Finalize screen in TSDS PEIMS, the PEIMS Campus Submitter may mark the subcategory as “Data Ready” to lock the subcategory from further changes. | PEIMS Campus Submitter | Determined by LEA | Determined by LEA | Determined by LEA | Determined by LEA |  |  |
| **PEIMS Campus Data Approval** | | | | | | | | |
|  | Using the View Reports screen in TSDS PEIMS, run PEIMS reports to verify data for accuracy. | PEIMS Campus Approver | Determined by LEA | Determined by LEA | Determined by LEA | Determined by LEA |  |  |
|  | Using the Prepare/Finalize Screen in TSDS PEIMS, The PEIMS Campus Approver should approve PEIMS data.   * Note that the PEIMS collection may be rejected at this point—if rejected, repeat Steps 1-10. | PEIMS Campus Approver | Determined by LEA | Determined by LEA | Determined by LEA | Determined by LEA |  |  |
|  | As part of the approval process, the PEIMS Campus Approver must view the Statement of Approval (SOA) and confirm. | PEIMS Campus Approver | Determined by LEA | Determined by LEA | Determined by LEA | Determined by LEA |  |  |

