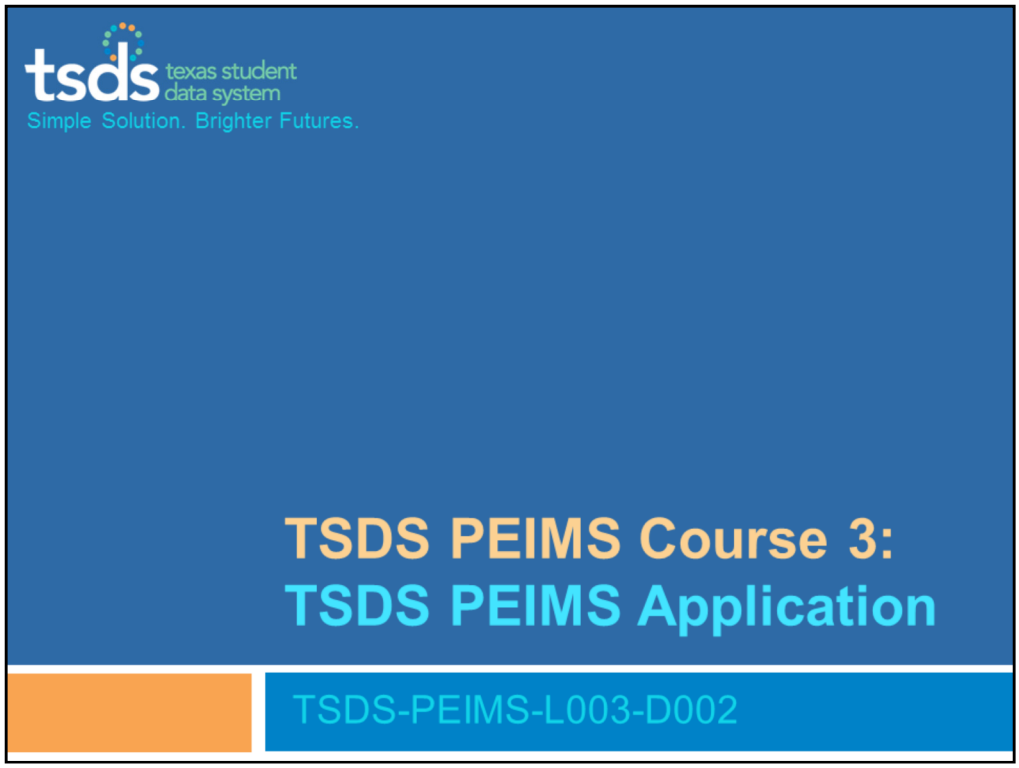

Welcome to the TSDS PEIMS Course 3: TSDS PEIMS Application.

Course Agenda

1

- Review TSDS Portal and PEIMS Application Roles
- Review the data flow process in the PEIMS application
- Review how to navigate and manage the PEIMS process
- TSDS PEIMS Reports
- Accessing the Data
- Prepare/Finalize and Completing the Data
- Approving the Data and Requesting an Extension from TEA
- Accepting the Data (ESC)
- Overview of TEA administrative functions

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Review TSDS Portal and PEIMS Application Roles
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TSDS PEIMS Reports
Accessing the Data
Prepare/Finalize and Completing the Data
Approving the Data and Requesting an Extension from TEA
Accepting the Data (ESC)
Overview of TEA administrative functions

Course Objectives

2

- The participant will be able to:
  - Describe the TSDS PEIMS Application functionality
  - Manage and monitor the Data Loading Process with the TSDS PEIMS Application
  - Access and Export Data from the PEIMS Application
  - Run the TSDS PEIMS Reports
  - Request an extension from TEA
  - Understand the Approval and Acceptance Process
  - Understand TEA's administrative functions

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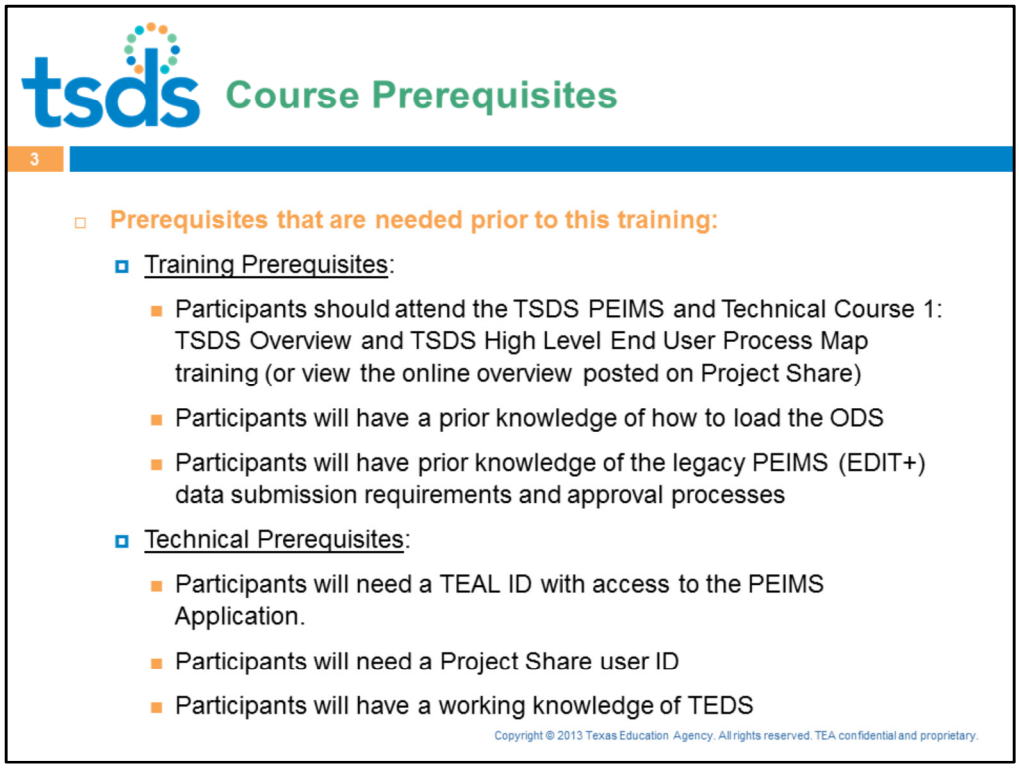
At the conclusion of this training, the participant will be able to:

- Describe the TSDS PEIMS Application functionality
- Manage and monitor the Data Loading Process with the TSDS PEIMS Application
- Access and interpret the TSDS PEIMS Reports
- Request an extension from TEA
- Understand TEA's administrative functions



Prerequisites that are needed prior to this training:

Training Prerequisites:

Participants should attend the TSDS PEIMS and Technical Course 1: TSDS Overview and TSDS High Level End User Process Map training (or view the online overview posted on Project Share)

Participants will have a prior knowledge of how to load the ODS

Participants will have prior knowledge of the legacy PEIMS (EDIT+) data submission requirements and approval processes

Technical Prerequisites:

Participants will need a TEAL ID with access to the PEIMS Application.

Participants will need a Project Share user ID

Participants will have a working knowledge of TEDS

Key Terms

4

Term	Definition
EDW (Education Data Warehouse)	This is the single data repository that feeds the PEIMS and the studentGPS collections
DTU (Data Transfer Utility)	The DTU is an FTP client that transfers files stored at the LEA to the eData Manager (eDM)
eDM (eData Manager)	The portal through which LEAs can manually submit data and monitor data submissions
ETL	ETL means Extract, Transform, Load. This refers to the process of moving data from one system to another (like SIS to ODS) and transforming the data to meet the requirements of the destination environment
ODS (Operational Data Store)	This is the actual data warehouse in the TSDS system
PDM (PEIMS Data Mart)	The PDM is the data mart that pulls data from the ODS and directly feeds the PEIMS application

Trainer Notes:
Read through each term and definition. As the participants have already seen these terms a couple of times before, it may be beneficial to cover up the definitions and lead the group through a Q&A of the terms.

Key Terms (cont'd)

5

Term	Definition
DDM (Dashboard Data Mart)	The DDM is the data mart that pulls data from the ODS and directly updates the studentGPS™ Dashboards
XML Interchange File	TEA uses XML Interchange Files as the vehicle to transfer data
Data Promotion	The process where data is extracted from the ODS and is transferred do the PEIMS Data Mart

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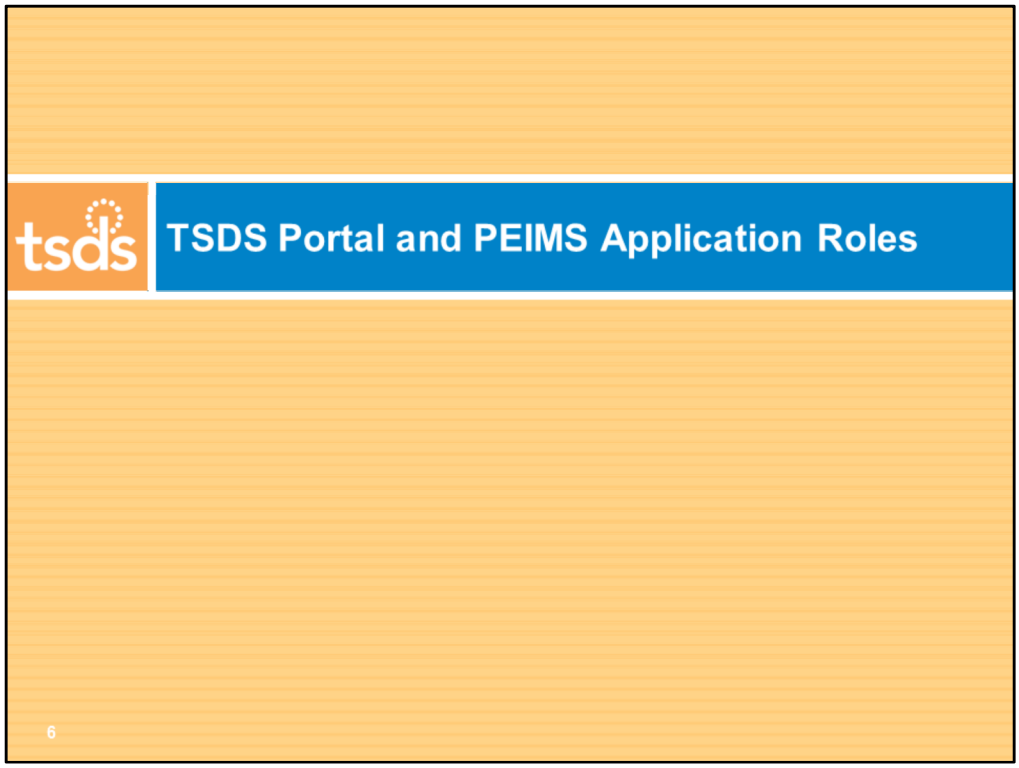
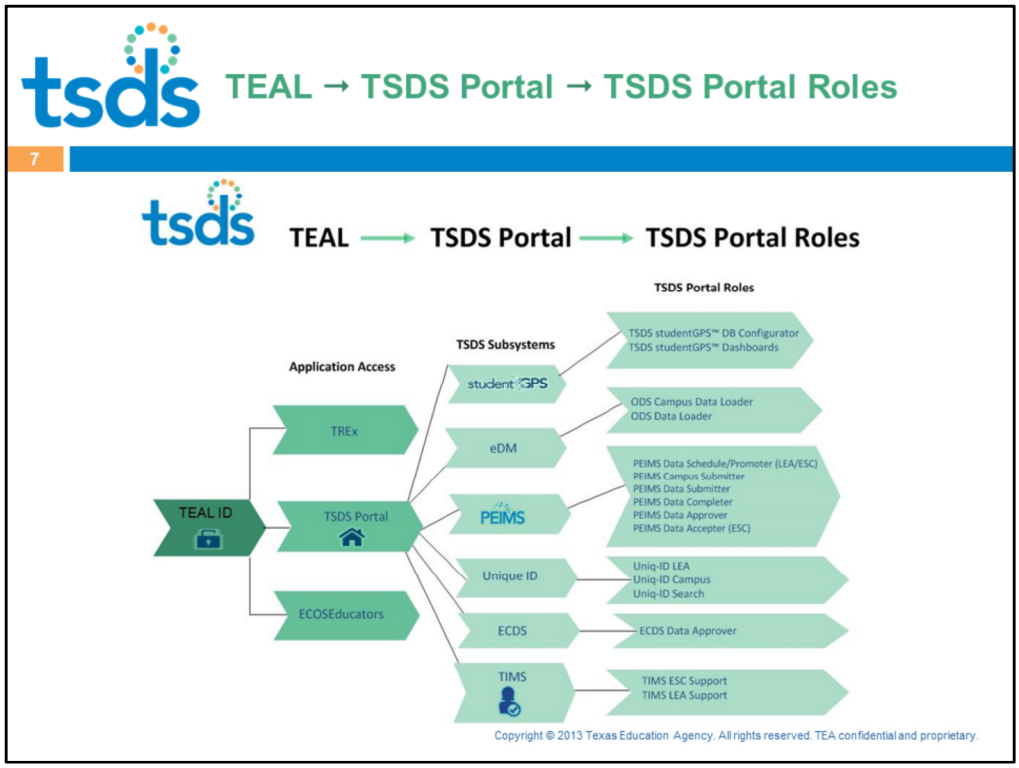
Trainer Notes:
Read through each term and definition. As the participants have already seen these terms a couple of times before, it may be beneficial to cover up the definitions and lead the group through a Q&A of the terms.



Let’s take a look at a few TSDS Portal and PEIMS Application Roles.



Key to understanding TSDS is the basic architecture that flows through the TSDS Portal. All users log on to TEAL, then access the TSDS Portal. From the Portal, users can move back and forth between TSDS applications. The TSDS Portal acts as the entranceway and facilitator for downstream applications, including studentGPS™ Dashboards. From there, users will also have access to tools such as the Validation Tool and TIMS.

Those of you who work with Unique ID, which is already in production, have experienced this arrangement.

Different Views for Different Roles

8

- Let's take a look at five roles and see how the Portal and PEIMS application views differ.
  - PEIMS Data Promoter
  - PEIMS Data Submitter
  - PEIMS Data Completer
  - PEIMS Data Approver (LEA)
  - PEIMS Data Accepter (ESC)
- Remember that a user can have a combination of roles, which will alter the user's views and privileges
  - On two of the PEIMS Roles we have included the ODS Data Loader role

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Let's take a look at five roles and see how the Portal and PEIMS application views differ.

PEIMS Data Submitter
PEIMS Data Completer
PEIMS Data Approver (LEA)
PEIMS Data Accepter (ESC)

Remember that a user can have a combination of roles, which will alter the user's views and privileges

On two of the PEIMS Roles we have included the ODS Data Loader role

PEIMS Data Promoter Role

9

- The PEIMS Data Promoter Role can:
  - Schedule Data Promotion
  - View all PEIMS Data Collections
  - Search PEIMS Data
- The PEIMS Data Promoter Role cannot:
  - Validate PEIMS Data
  - Generate Reports
  - Download Data
  - Mark Data Ready
  - Complete Data

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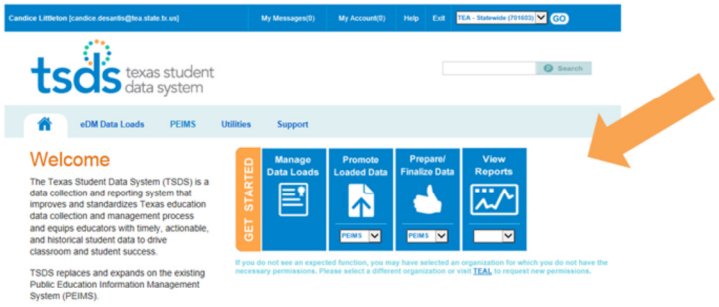
The PEIMS Data Promoter Role can:
Schedule Data Promotion
View all PEIMS Data Collections
Search PEIMS Data
The PEIMS Data Promoter Role cannot:
Validate PEIMS Data
Generate Reports
Download Data
Mark Data Ready
Complete Data

PEIMS Data Submitter

10

PEIMS Data Submitter and ODS Data Loader Role: Portal View

- The PEIMS Data Submitter has privileges to Promote Loaded Data, Validate and Search the Data and View the Reports.
- Manage Data Loads is associated with the ODS Data Loader Role



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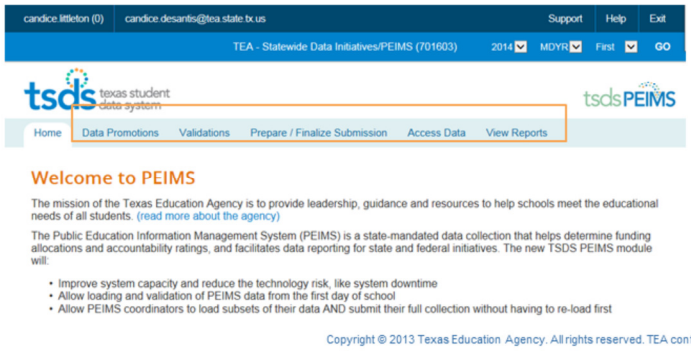
<u>PEIMS Data Submitter and ODS Data Loader Role</u>
Portal View
The PEIMS Data Submitter has privileges to Promote Loaded Data, Validate and Search the Data and View the Reports.
Manage Data Loads is associated with the ODS Data Loader Role

PEIMS Data Submitter

11

PEIMS Data Submitter and ODS Data Loader Role: PEIMS Application View

- PEIMS Data Submitter has access to the Data Promotions, Validations, Prepare/Finalize Submission, Access Data and View Reports tab
- The PEIMS Data Submitter can promote PEIMS Data into the PDM and validate the PEIMS Data, search the Data but can't mark the data complete.



PEIMS Data Submitter and ODS Data Loader Role: PEIMS Application View
PEIMS Data Submitter has access to the Data Promotions, Validations, Prepare/Finalize Submission, Access Data and View Reports tab
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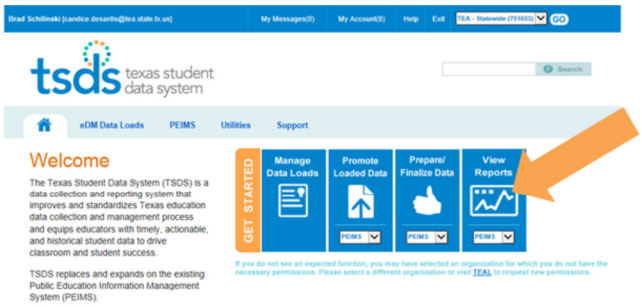
PEIMS Data Completer

12

PEIMS Data Completer and ODS Data Loader Role: Portal View

- The Data Completer has portal links to Promote Loaded Data, Prepare/Finalize Data and View Reports.
- Manage Data Loads is associated with the ODS Data Loader Role



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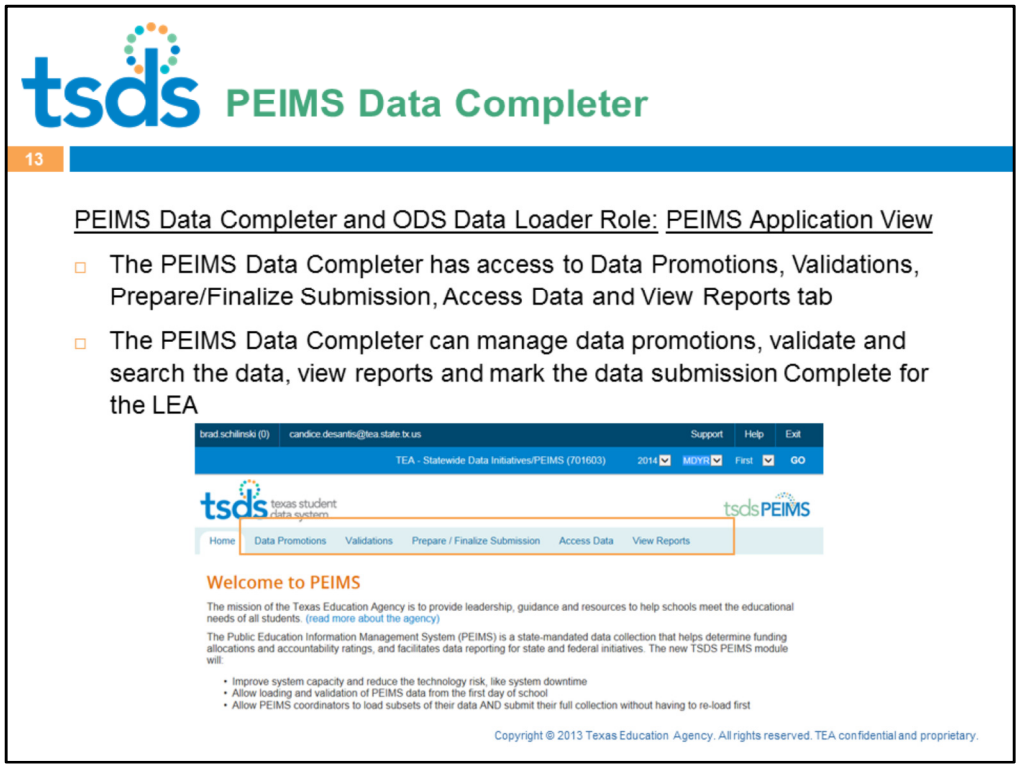
PEIMS Data Completer and ODS Data Loader Role

Portal View

The Data Completer has portal links to Promote Loaded Data, Prepare/Finalize Data and View Reports.

Manage Data Loads is associated with the ODS Data Loader Role



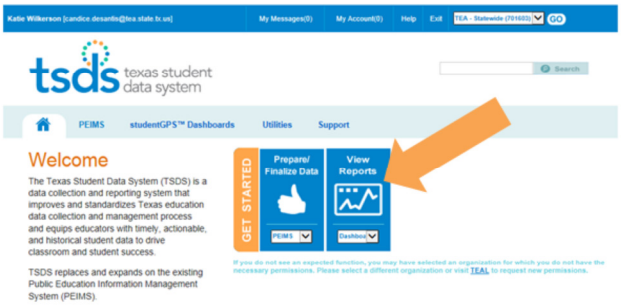
PEIMS Data Completer and ODS Data Loader Role: PEIMS Application View
The PEIMS Data Completer has access to Data Promotions, Validations, Prepare/Finalize Submission, Access Data and View Reports tab
The PEIMS Data Completer can manage data promotions, validate and search the data, view reports and mark the data submission Complete for the LEA
Trainer's Note: Once inside the PEIMS Application, the PEIMS Data Completer has the ability to mark the PEIMS submission as "Complete". This role is appropriate for the PEIMS Coordinator at the LEA

PEIMS Data Approver (LEA)

14

PEIMS Data Approver: Portal View

- The PEIMS Data Approver has access to Prepare/Finalize Data and View Reports within the Portal
- The PEIMS Data Approver at the LEA is role used for the Superintendent to Approve the PEIMS data submission.



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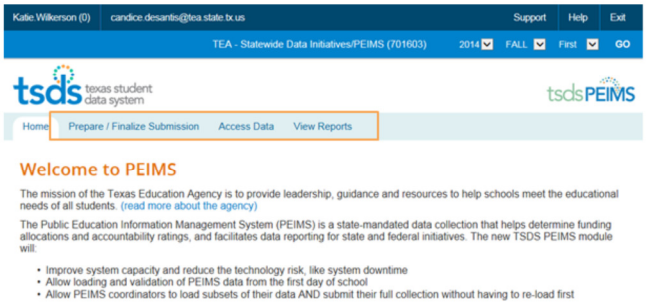
PEIMS Data Approver
Portal View
The PEIMS Data Approver has access to Prepare/Finalize Data and View Reports within the Portal
The PEIMS Data Approver at the LEA is role used for the Superintendent to Approve the PEIMS data submission.

PEIMS Data Approver (LEA)

15

PEIMS Data Approver: PEIMS Application View

- The PEIMS Data Approver has access to the Prepare/Finalize Submission, Access Data and View Reports tabs.
- The PEIMS Data Approver at the LEA is role used for the Superintendent to Approve the PEIMS data submission.



PEIMS Data Approver
PEIMS Application View
The PEIMS Data Approver has access to the Prepare/Finalize Submission, Access Data and View Reports tabs.
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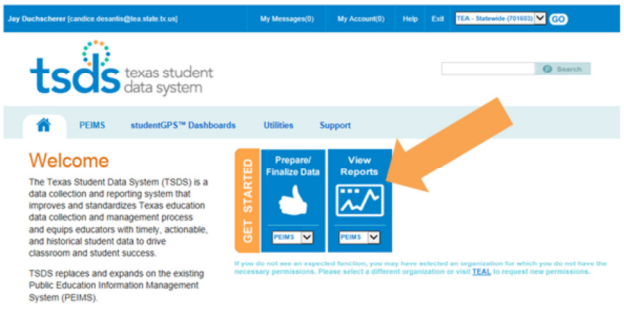
PEIMS Data Accepter (ESC)

16

PEIMS Data Accepter: Portal View

- This role has access to view and run reports, and accept/reject the ESC PEIMS data collection
- If the user also has the "ESC Access to LEA Data" permission, then the user can also accept/reject the collections for LEAs belonging to their ESC



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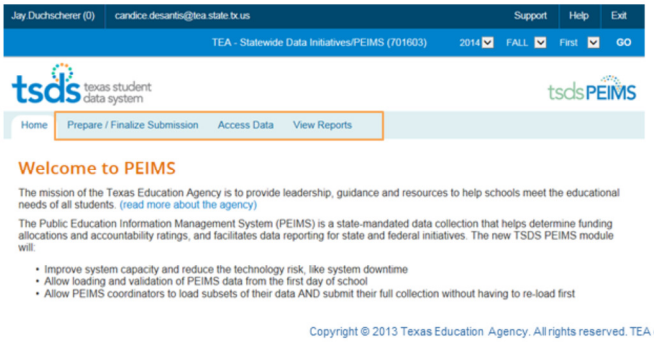
PEIMS Data Accepter
Portal View
This role has access to PEIMS Prepare/Finalize and View Reports
This is the role the ESCs will use to view, run reports, and accept/reject the ESC PEIMS data collection. If the user also has the "ESC Access to LEA Data" permission, then the user can also accept/reject the collections for LEAs belonging to their ESC.

PEIMS Data Accepter (ESC)

17

PEIMS Data Accepter: PEIMS Application View

- This role has access to view, run reports, and accept/reject the ESC PEIMS data collection
- If the user also has the "ESC Access to LEA Data" permission, then the user can also accept/reject the collections for LEAs belonging to their ESC



PEIMS Data Accepter
PEIMS Application View
This role has access to view, run reports, and accept/reject the ESC PEIMS data collection
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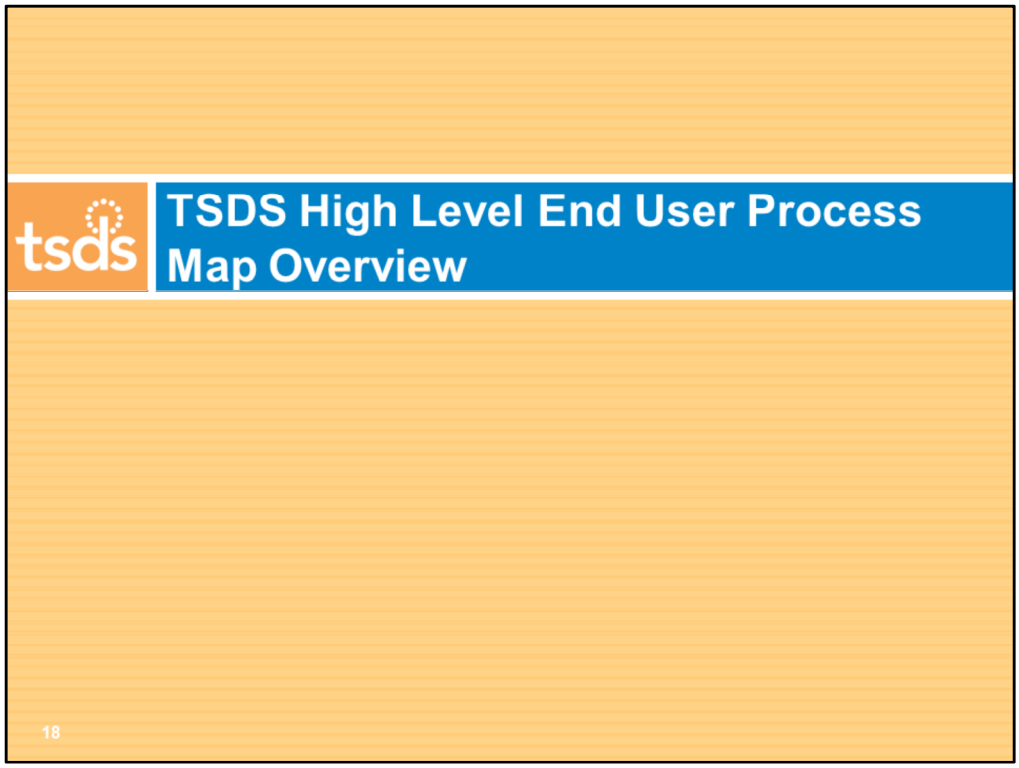
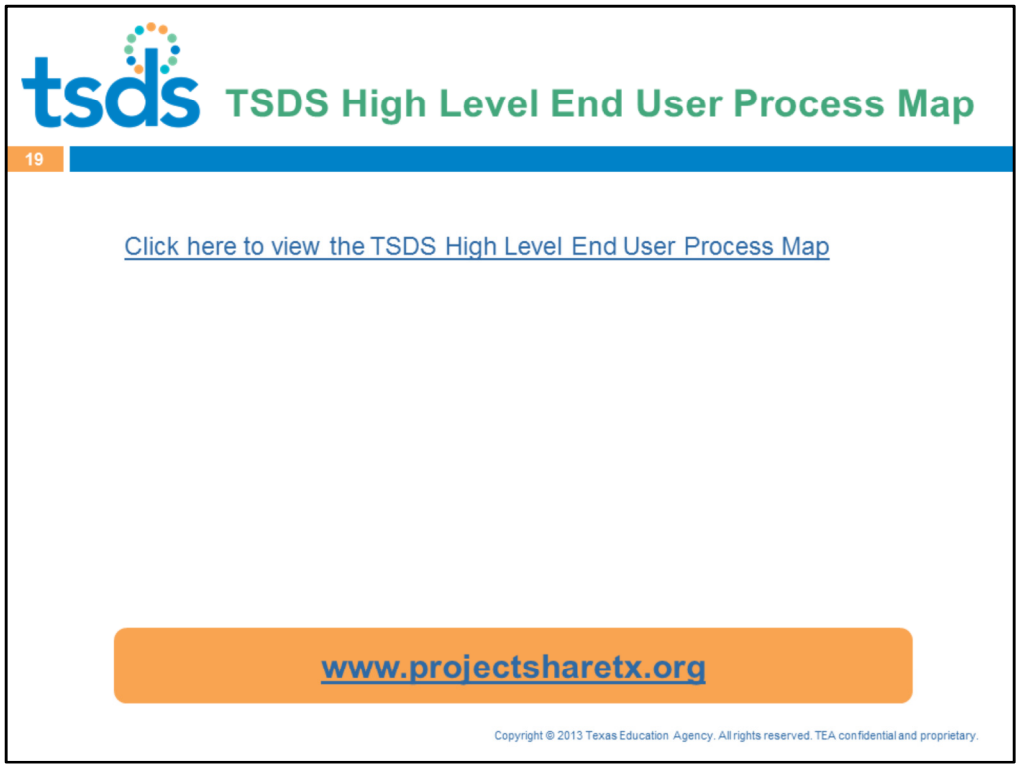
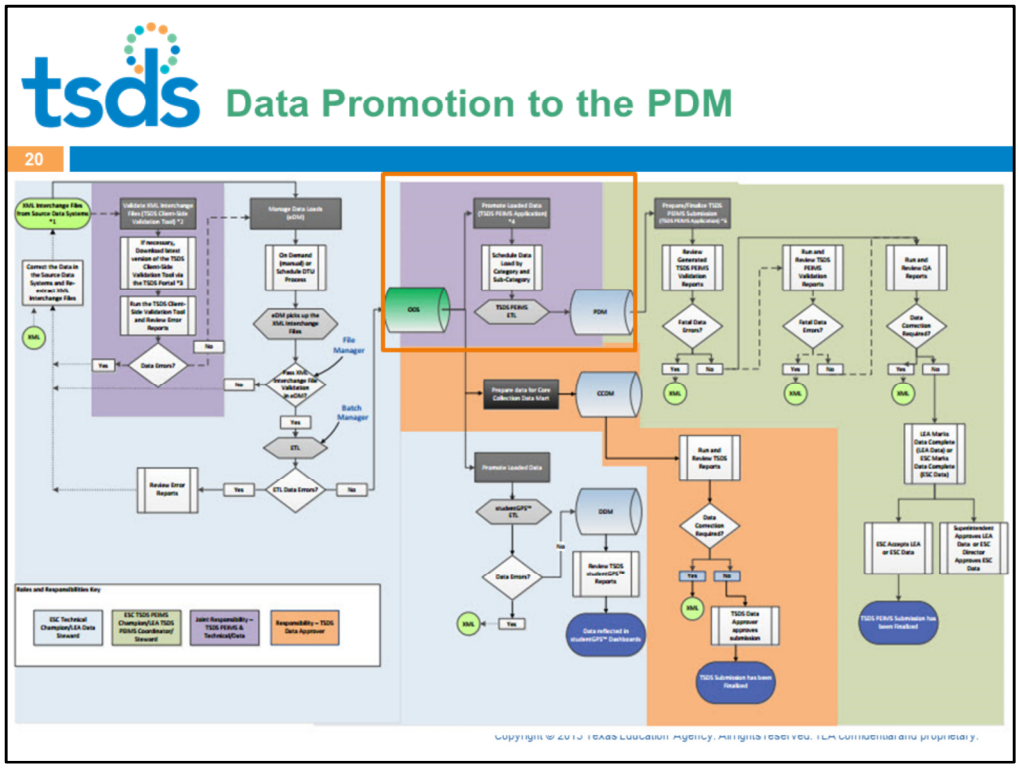


Let's first take a look at where we are in the TSDS High Level End User Process.

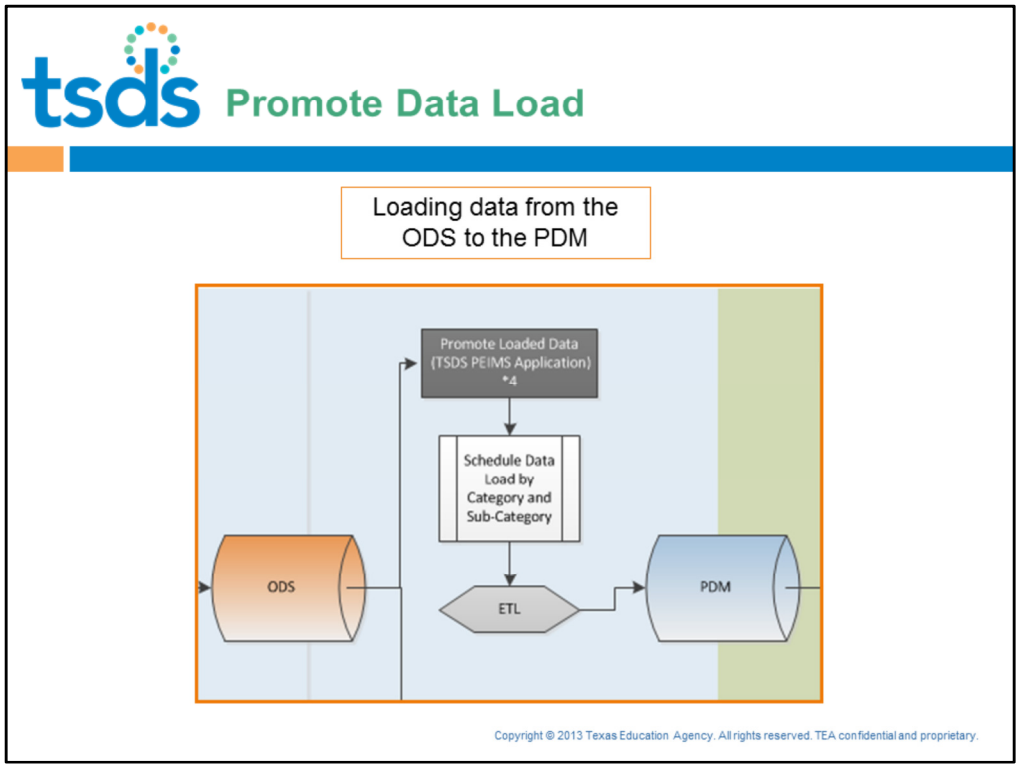


Let's take a good look at the TSDS High Level End User Process Map, from end to end. At this point, let's download the full TSDS High Level End User Process Map from Project Share. It will be easier to read. Log in to Project Share and access the process map.

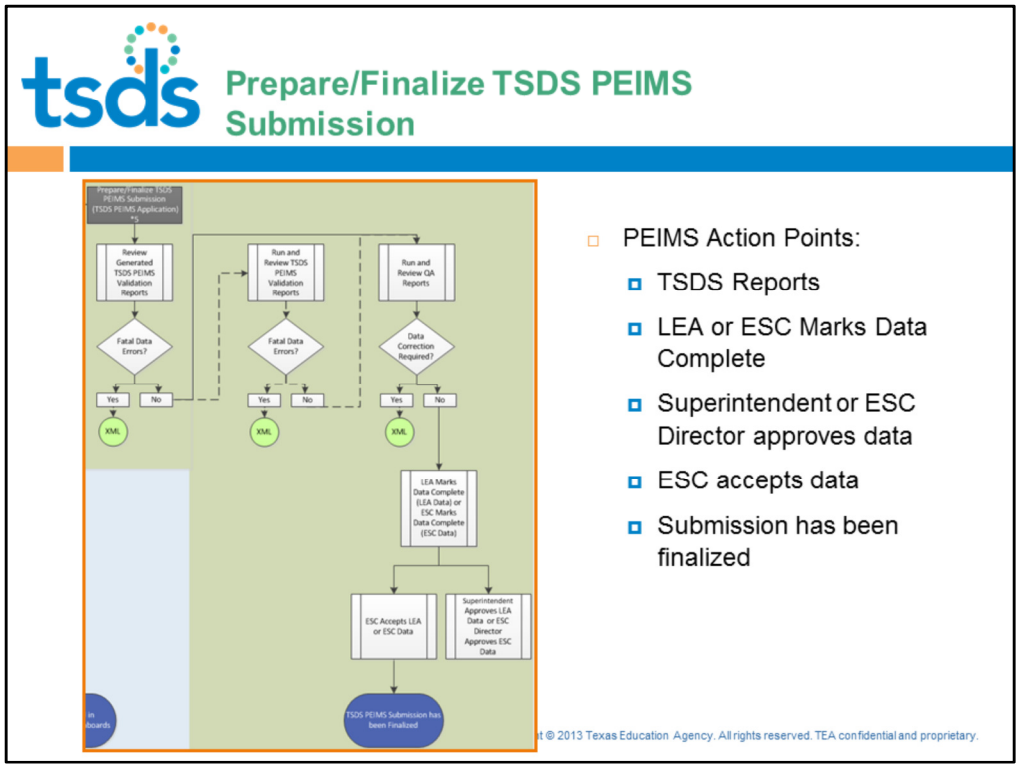
Trainer notes: Make sure that the participants either download a copy or receive a hand out at this point.



This course focuses on the activities in this section of the data flow process. Once the data has been updated in the ODS, the LEA PEIMS Coordinator or the ESC PEIMS Champion schedules the data promotion to the PDM. Once the data has been accepted into the PDM, the remainder of the PEIMS process can continue.

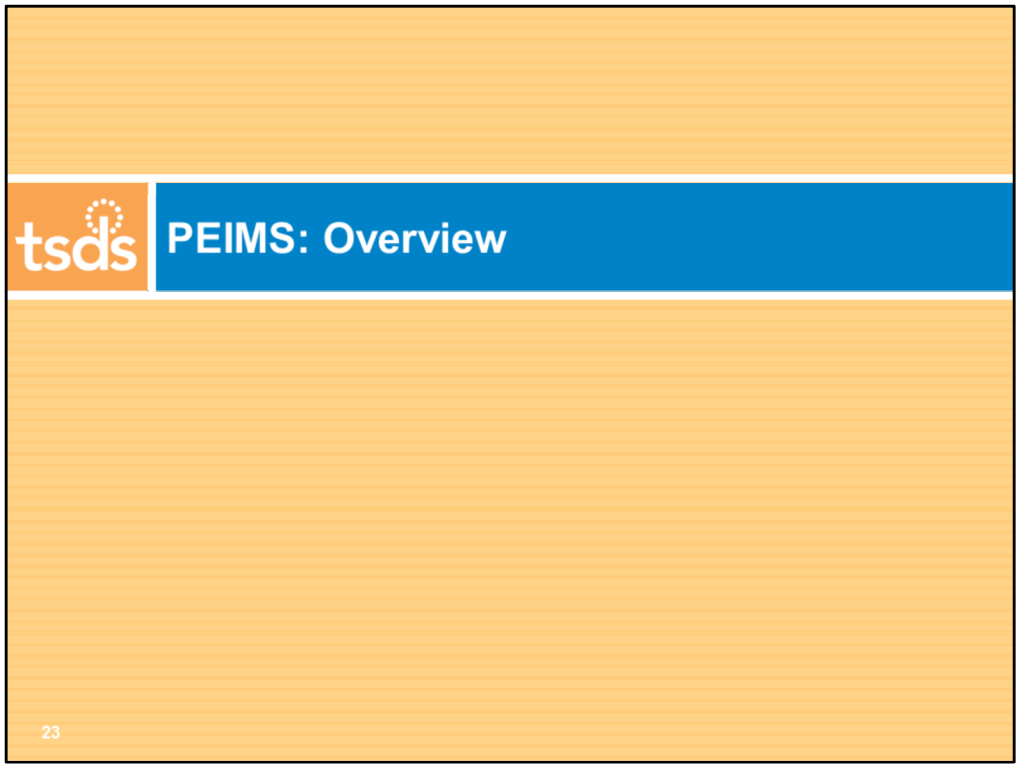


The first part of the process is promoting loaded data from the Operational Data Store (ODS) to the PEIMS Data Mart (PDM). We will talk about this process in greater detail later in the course.

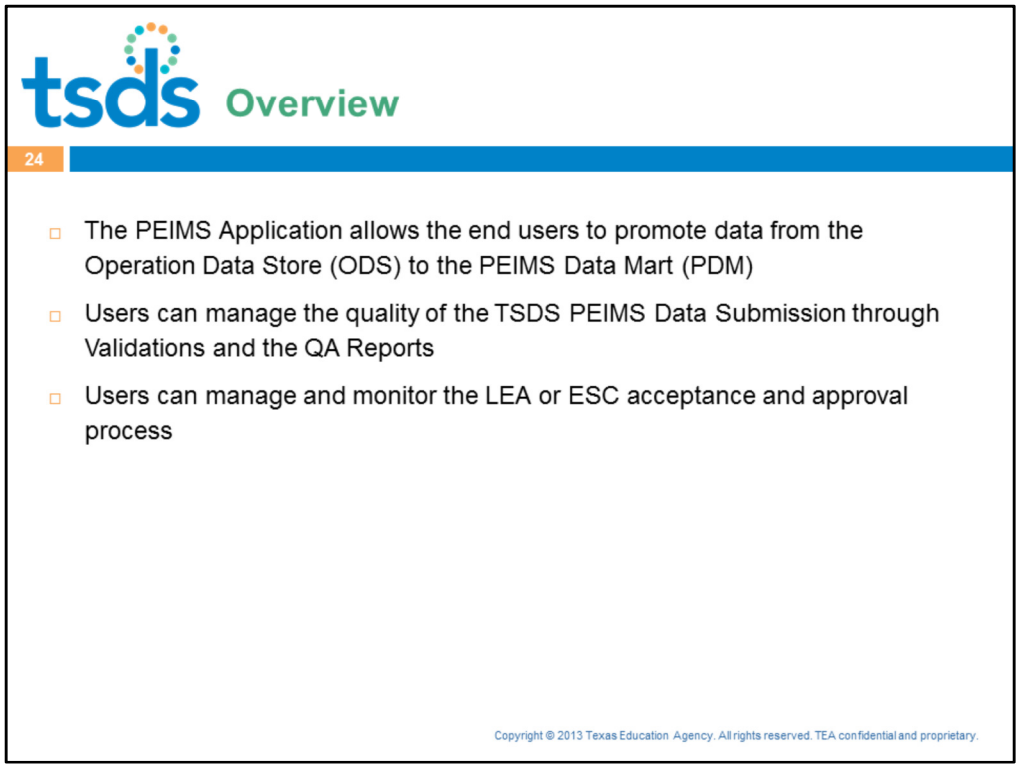


Once the data has been promoted the LEA PEIMS coordinator, ESC PEIMS Champs and authorized campus users move the TSDS PEIMS submissions through the preparation and approval process. There are several key points along the way:

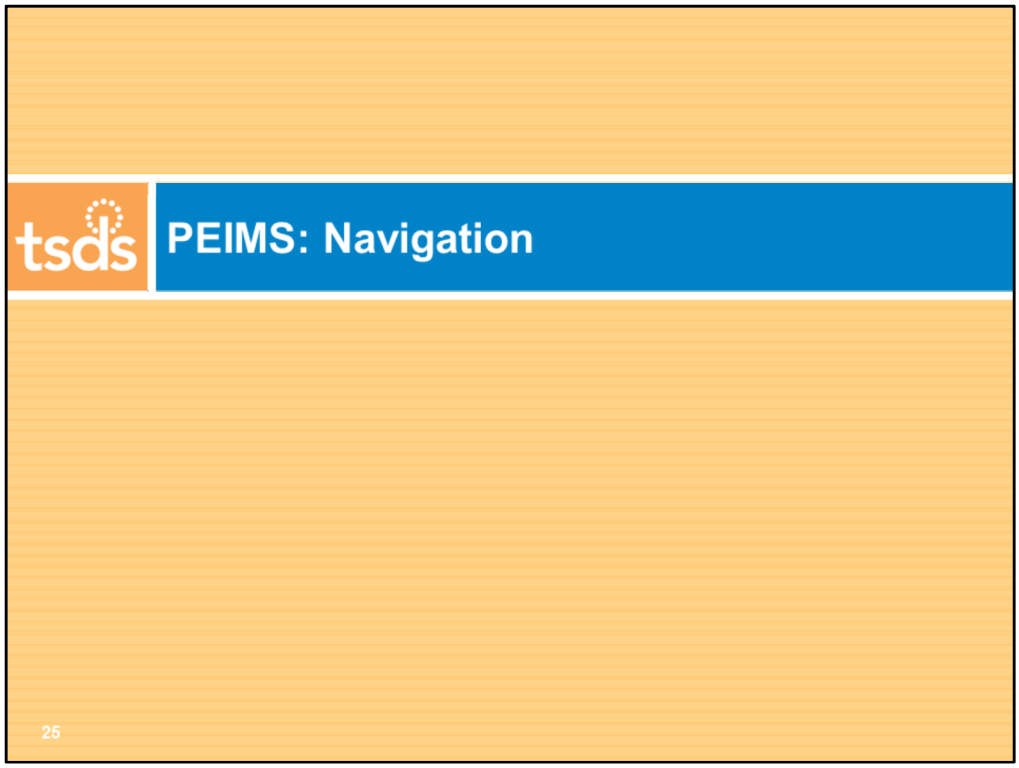
- TSDS Reports
- LEA or ESC Marks Data Complete
- Superintendent or ESC Director approves data
- ESC accepts data
- Submission has been finalized



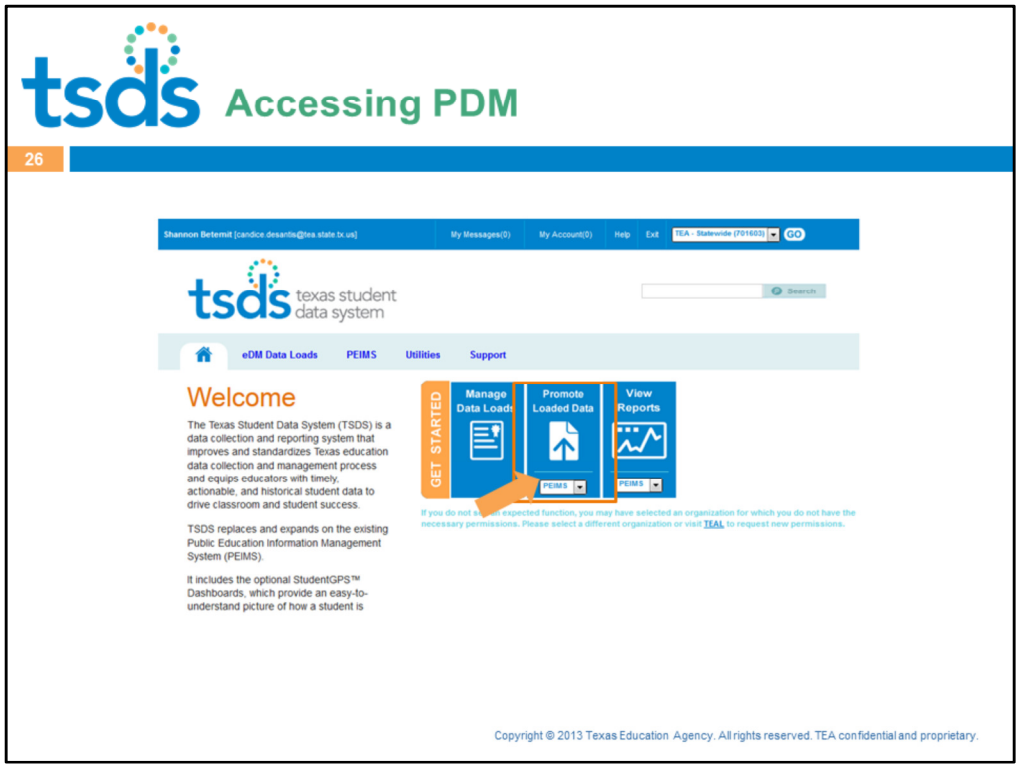
Let’s begin with an overview of the PEIMS application.



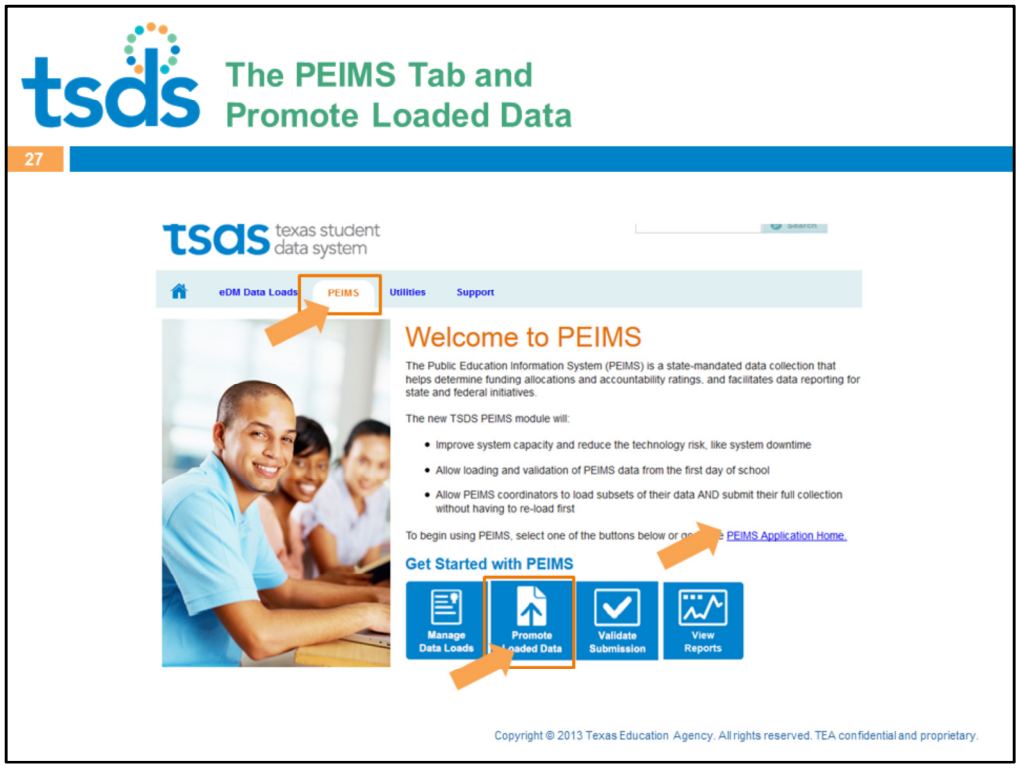
- The PEIMS Application allows the end users to promote data from the Operation Data Store (ODS) to the PEIMS Data Mart (PDM)
- Users can manage the quality of the TSDS PEIMS Data Submission through Validations and the QA Reports
- Users can manage and monitor the LEA or ESC acceptance and approval process



Let's take a look at how we are going to access and navigate the PEIMS application.



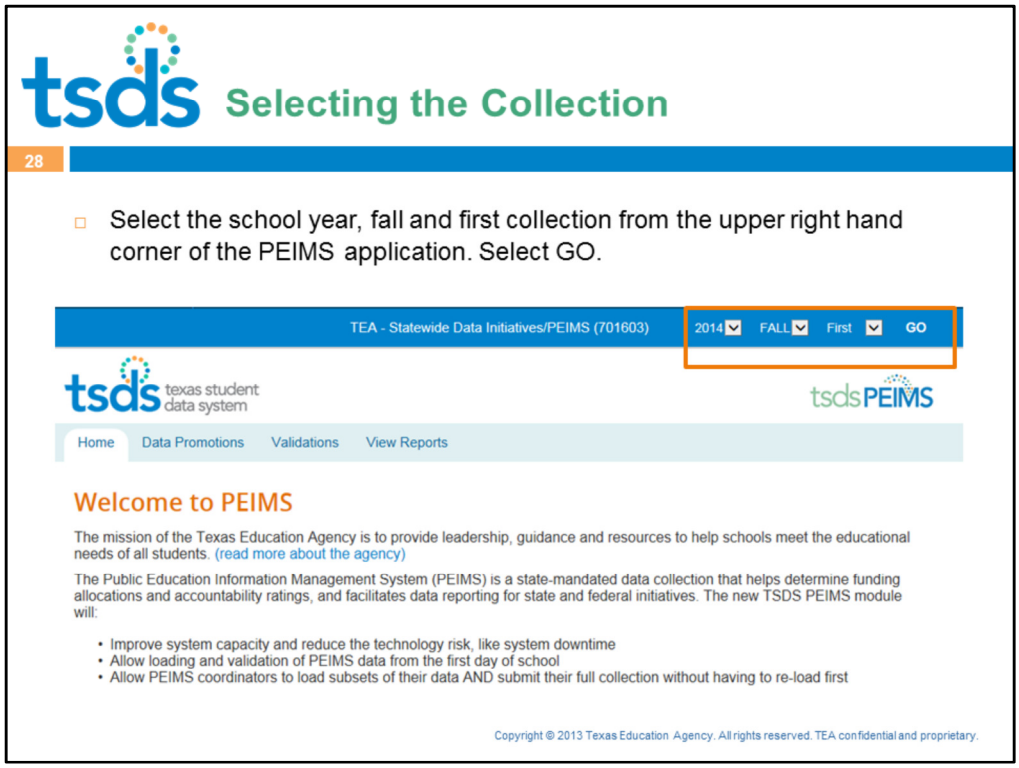
Once you have logged in, notice the TSDS Portal menu options. We can access the Promote Loaded Data menu option from this location or we can click on the PEIMS tab to access the PEIMS data mart from the Portal.



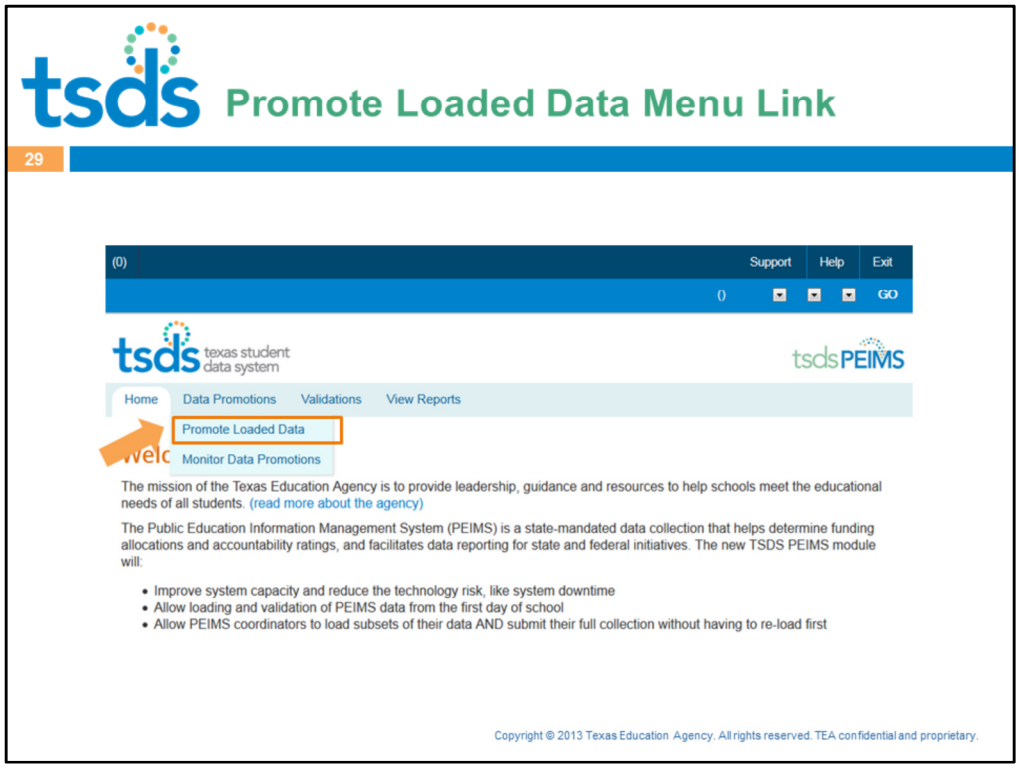
Once the user accesses the PEIMS application through the TSDS portal, there are several menu links from the Main Menu, all based on the user's roles and authorizations. Depending on the users role and authority at the LEA or the ESC, menu options may vary from this screenshot. We are going to discuss all the menu options although your user experience might be slightly different depending on your role in your agency.

Once we click on the PEIMS tab we see the same Promote Loaded Data menu option as we saw on the previous screen. We can choose the Promote Loaded Data option from this screen or we can access the PEIMS Application by clicking the PEIMS Application Home link and then promote the loaded data.

In this section, we are only going to focus on Data Promotions, specifically scheduling and monitoring a data promotion. Later we will look at Data Validations and Viewing Reports.

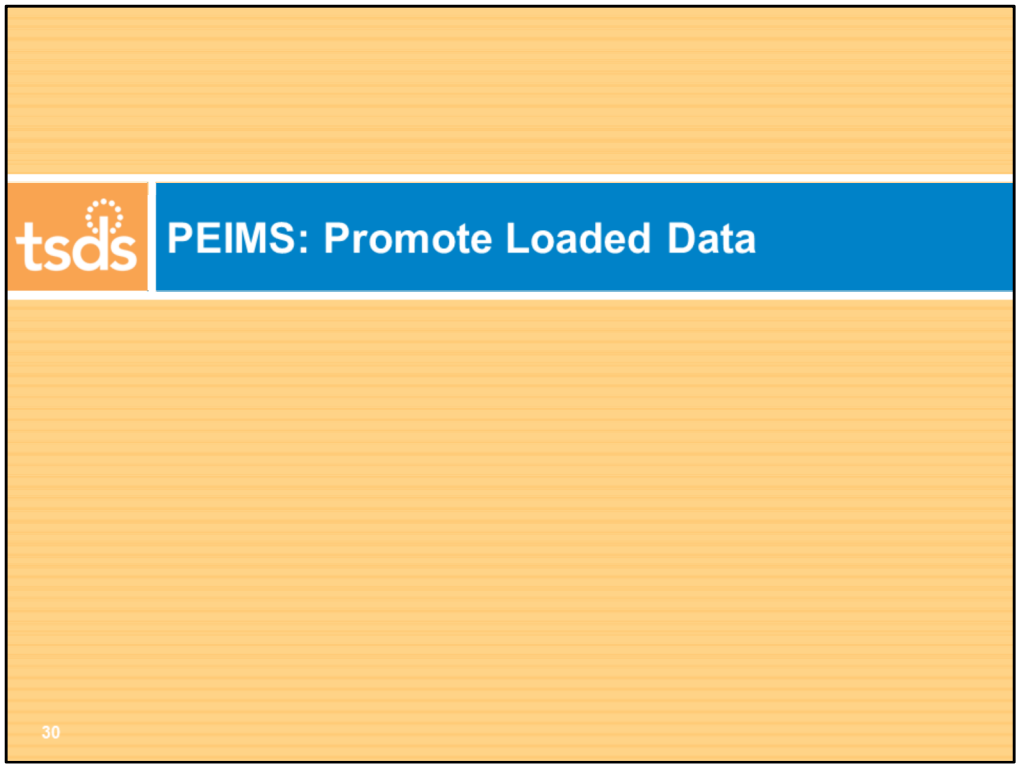


Select the school year, fall and first collection from the upper right hand corner of the PEIMS application. Select GO.

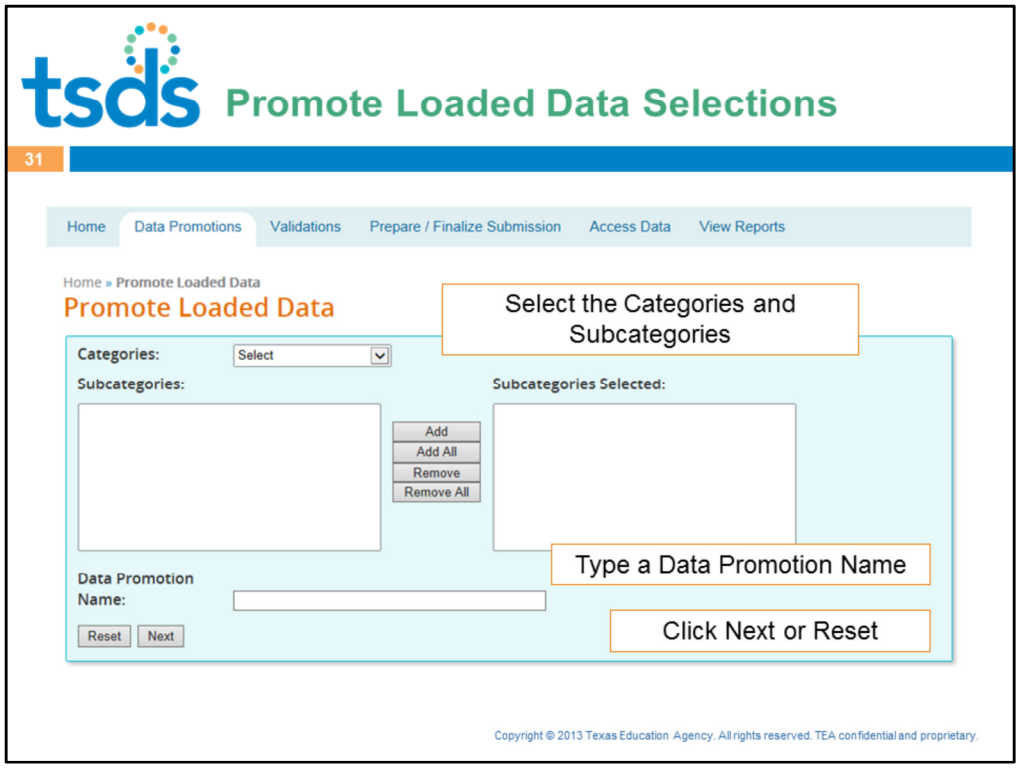


Once the user accesses the PEIMS application through the TSDS portal, there are several menu links from the Main Menu, all based on the user's roles and authorizations. Depending on the users role and authority at the LEA or the ESC, menu options may vary from this screenshot.

Again we see the Promote Loaded Data option in the Data Promotions menu. Lets take a look at this option now.

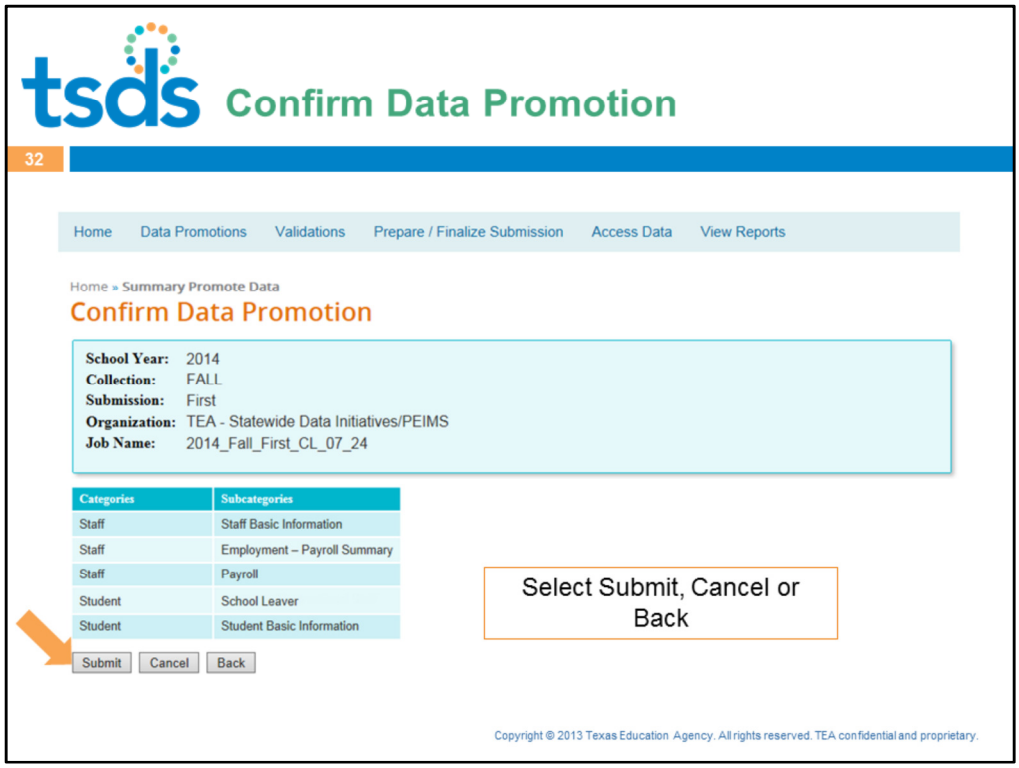


Let's explore what happens when Schedule Data Promotion is selected.

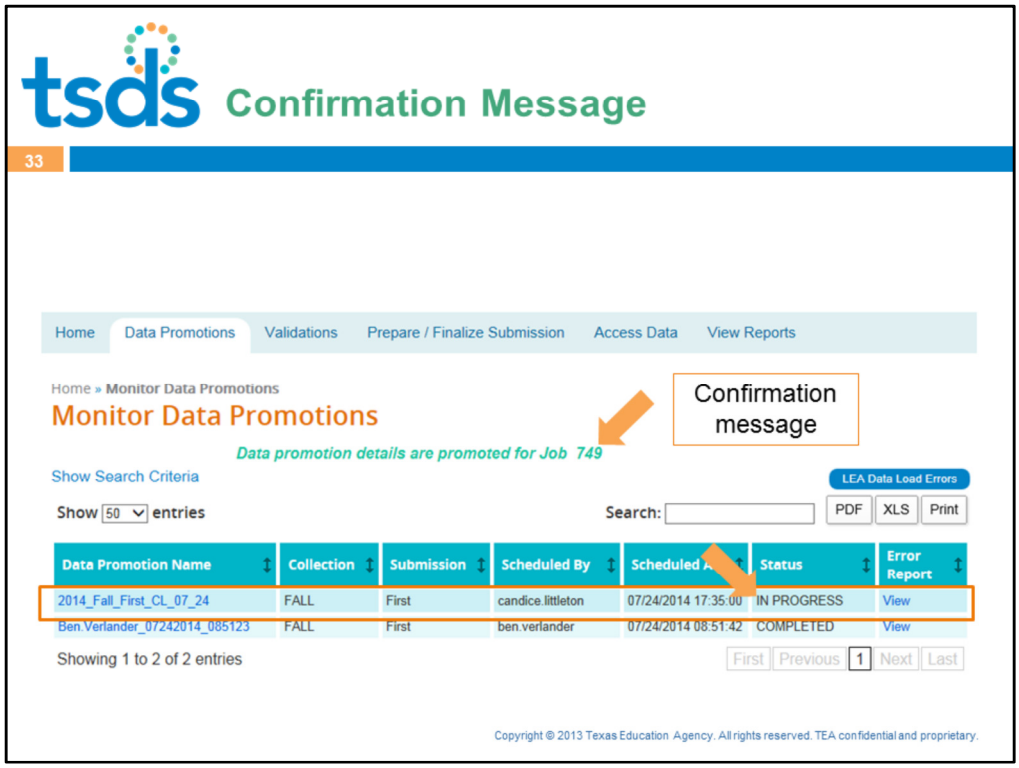


Once we have selected that menu option we need to specify what data set will be promoted from the ODS to the PDM. The user needs to select the parameters for the data that will be promoted. The user must select or provide information for the following:

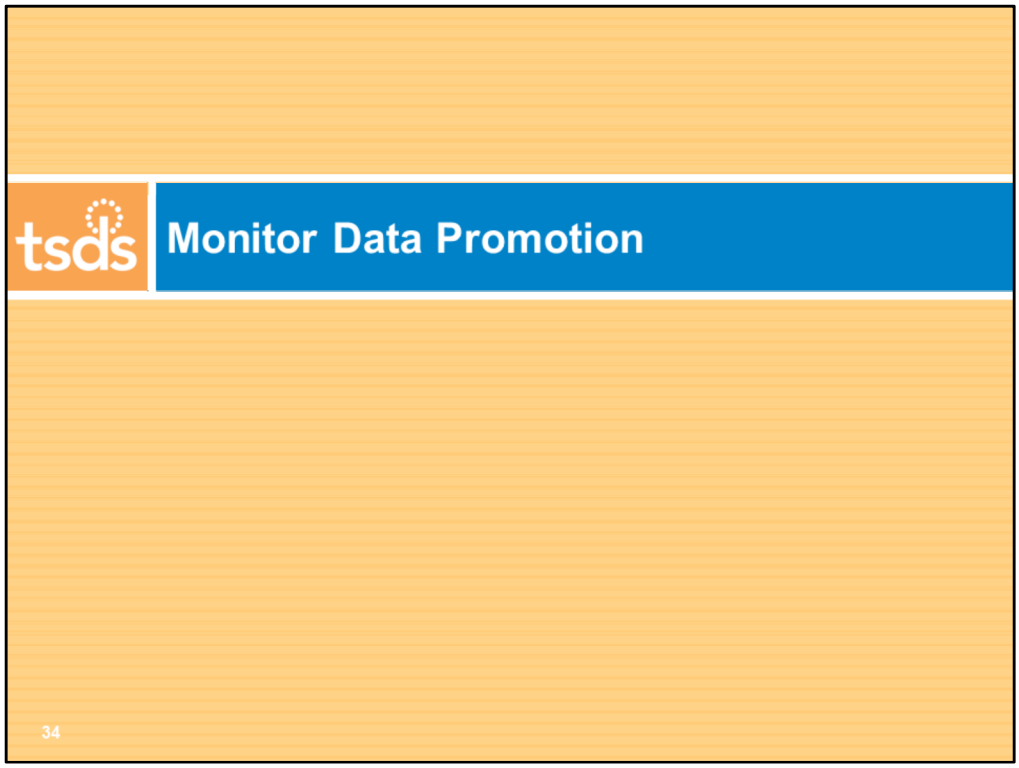
- Category: Staff, Finance, Ed Org, Student or All
- Subcategories
  - user can select Subcategories by Category
  - user can select Subcategories across Categories
- The user must also enter the Data Promotion Name



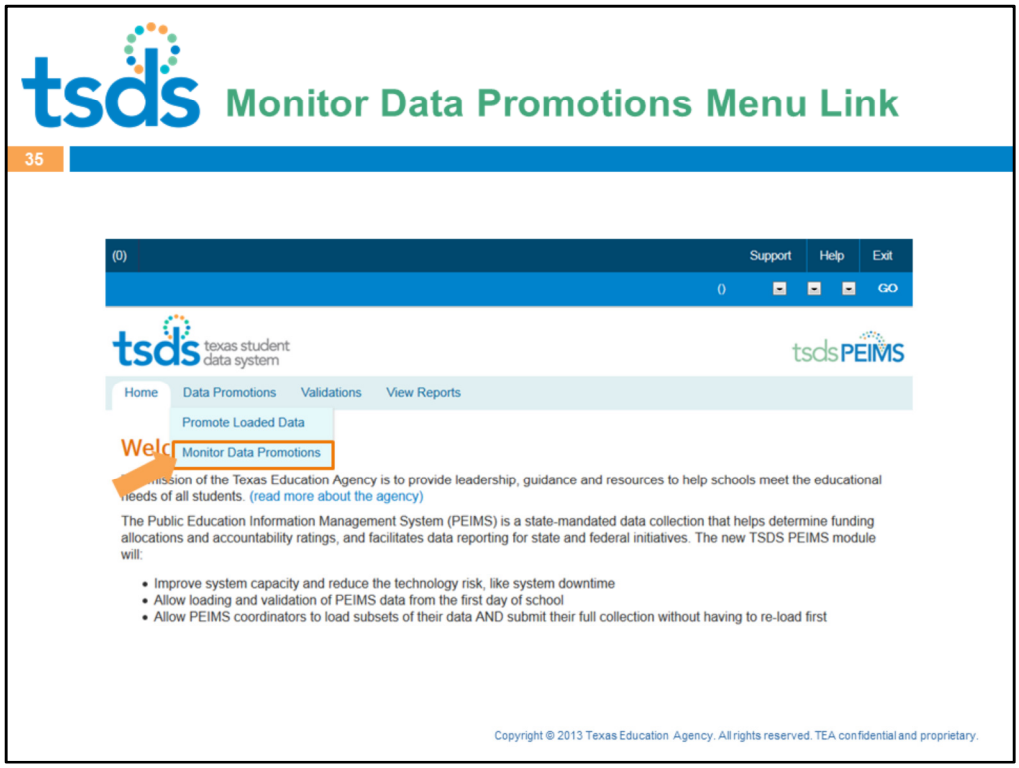
Select Submit, Cancel or Back



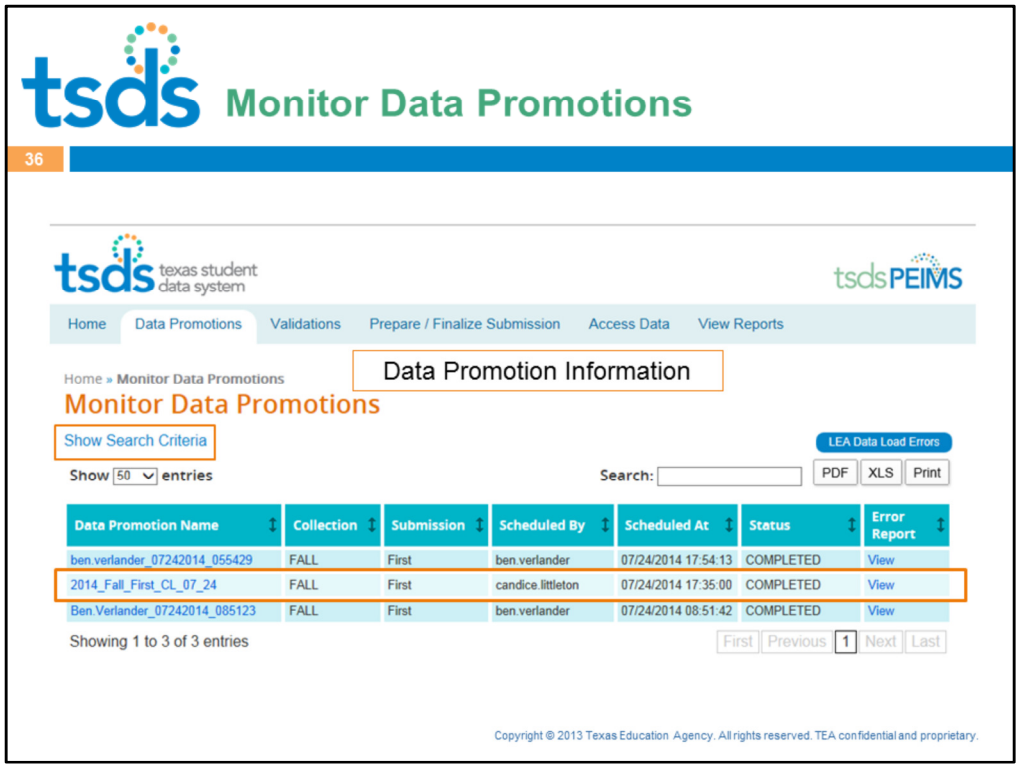
After the data promotion has been processed the user sees the confirmation message: Data promotion details are promoted for Job 749. The user can sort the data by clicking on the sort arrow next to the column headers, view the details by clicking on the data promotion name or view error reports by clicking on view. The status will show as In Progress, Completed, Completed with Errors or Failed.



After the data promotion is scheduled, the PEIMS Coordinator can monitor the progress of the promotion and view job details once the processing has completed.



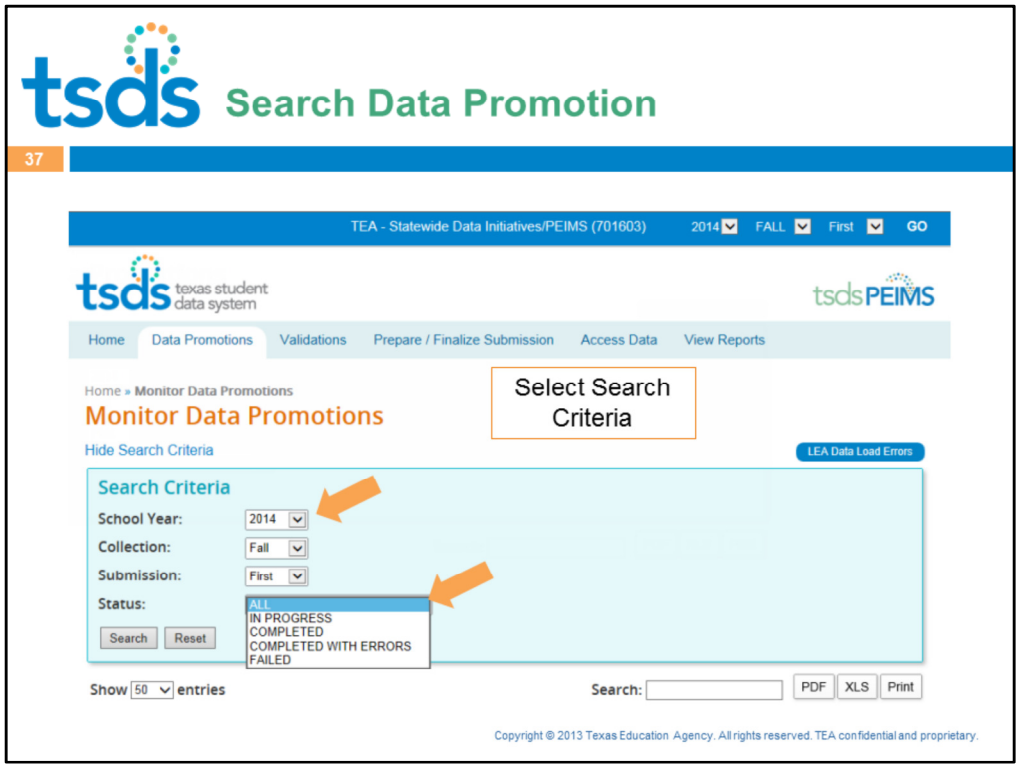
Underneath Data Promotions the other option is Monitor Data Promotions. The user selects this menu link to track the progress of the data promotion.



Under Monitor Data Promotions, all the data promotions that have been submitted are logged. The user can view the Data Promotion Name, the Collection, the Submission, who scheduled the data promotion, when the data promotion was scheduled and the Status of the promotion.

The Status is posted as either In Progress, Completed, Completed with Errors or Failed.

Under Monitor Data Promotions the user can search for a target data promotion using either the sorting function in the columns (Note the arrows in each column header) or the search parameters provided in the drop down menus. We will look at the search criteria on the next slide.



Under Monitor Data Promotions the user can search for a target data promotion using the search parameters provided in the drop down menus.

The target search criteria includes:

- The School Year
- The Collection Period
  - All
  - Fall (Collection 1)
  - Mid-Year (Collection 2)
  - Summer (Collection 3)
  - Extended Year (Collection 4)
- The Submission
  - As a note, under Submission, if the user selects the Prior Year, the only choice is Working
  - If the user selects Current Year with ESC Accepted Collections, then the user can select First or Resubmission
  - If the user selects Current Year and there is no ESC Accepted PDM Collection, then First is the only choice.
  - If the user selects a Future Year, then First is again the only choice.
- And the Collection Status. Either:
  - All
  - In Progress
  - Completed
  - Completed with Errors
  - Failed

Data Promotion Status

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The Data Promotion Status can be:

- In Progress—the data is being processed
- Completed-the data has completed processing
- Completed with errors—The data completed but errors were identified
- Failed--the system found primary key constraints that are not in ODS but exist in the PEIMS Data Mart. Records that did not load would be listed here.

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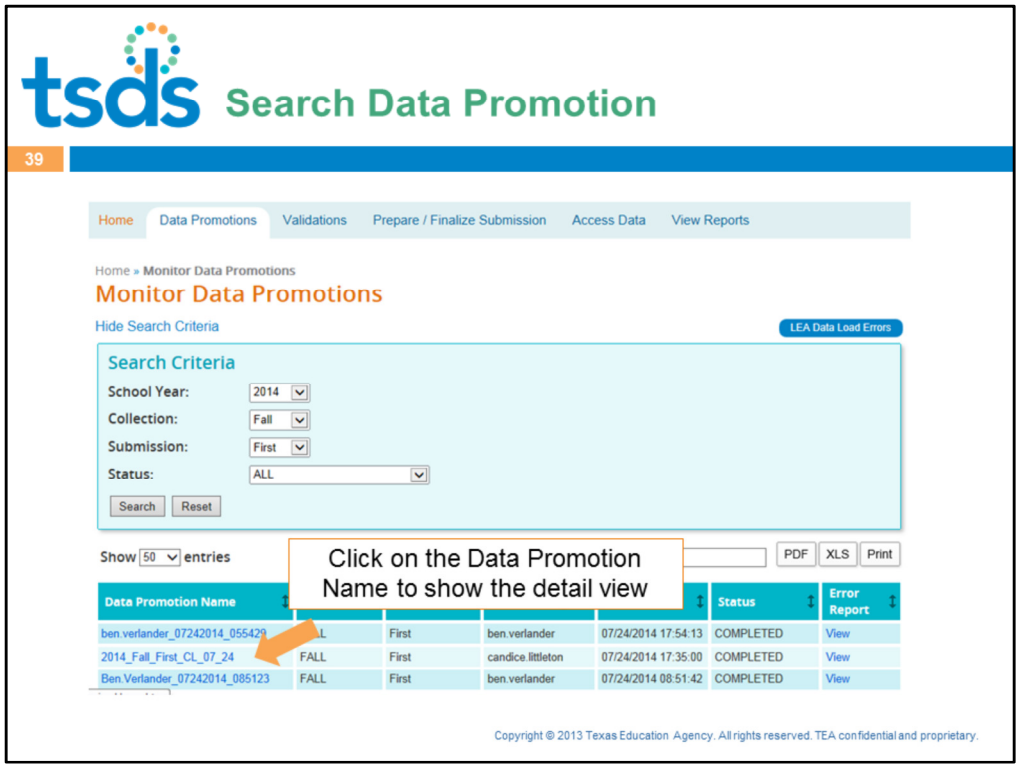
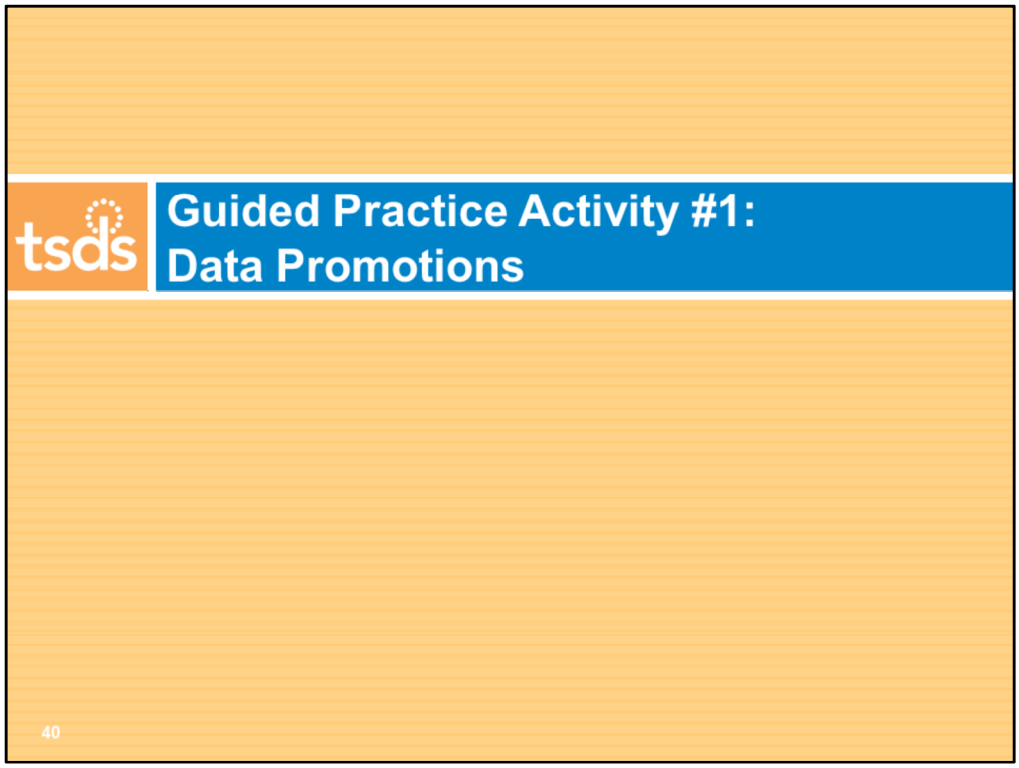
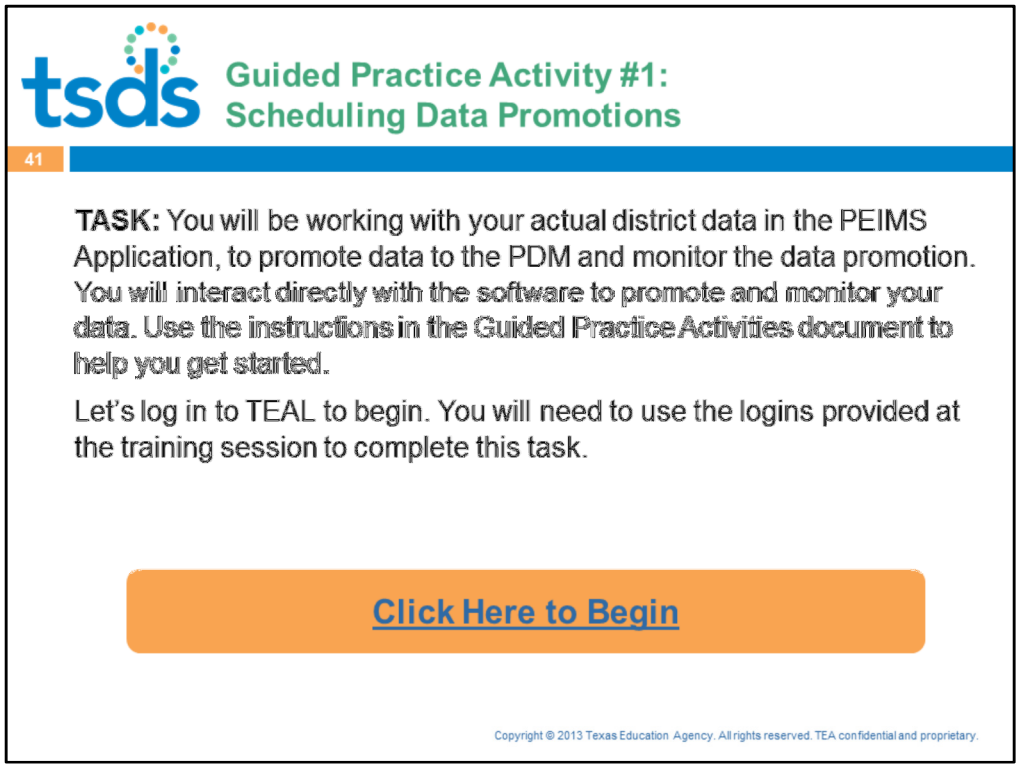
The Data Promotion Status can be:
In Progress—the data is being processed
Completed-the data has completed processing
Completed with errors—The data completed but errors were identified
Failed--the system found primary key constraints that are not in ODS but exist in the PEIMS Data Mart. Records that did not load would be listed here.



Click on the Data Promotion Name to show the detail view.

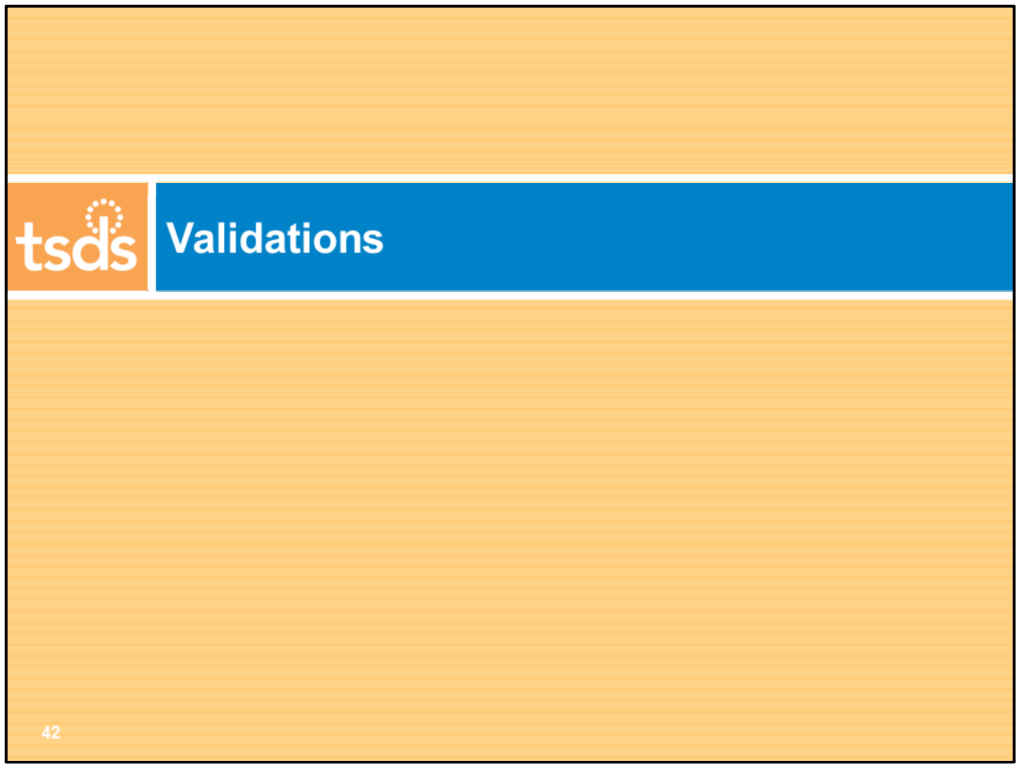


Now we are going to walk through the PEIMS Application together, specifically scheduling and monitoring data promotions.



TASK: You will be working with your actual district data in the PEIMS Application, to promote data to the PDM and monitor the data promotion. You will interact directly with the software to promote and monitor your data. Use the instructions in the Guided Practice Activities document to help you get started.

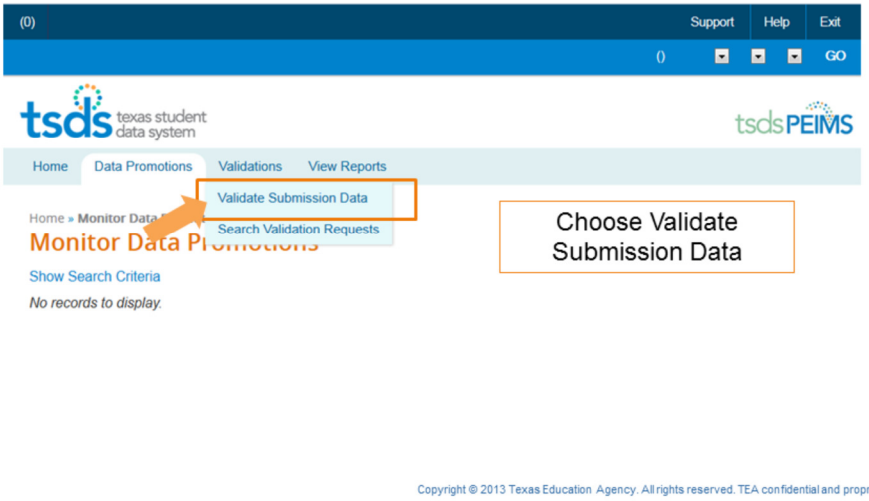
Let's log in to TEAL to begin



Let’s take a look at the validation process.

Validations

43



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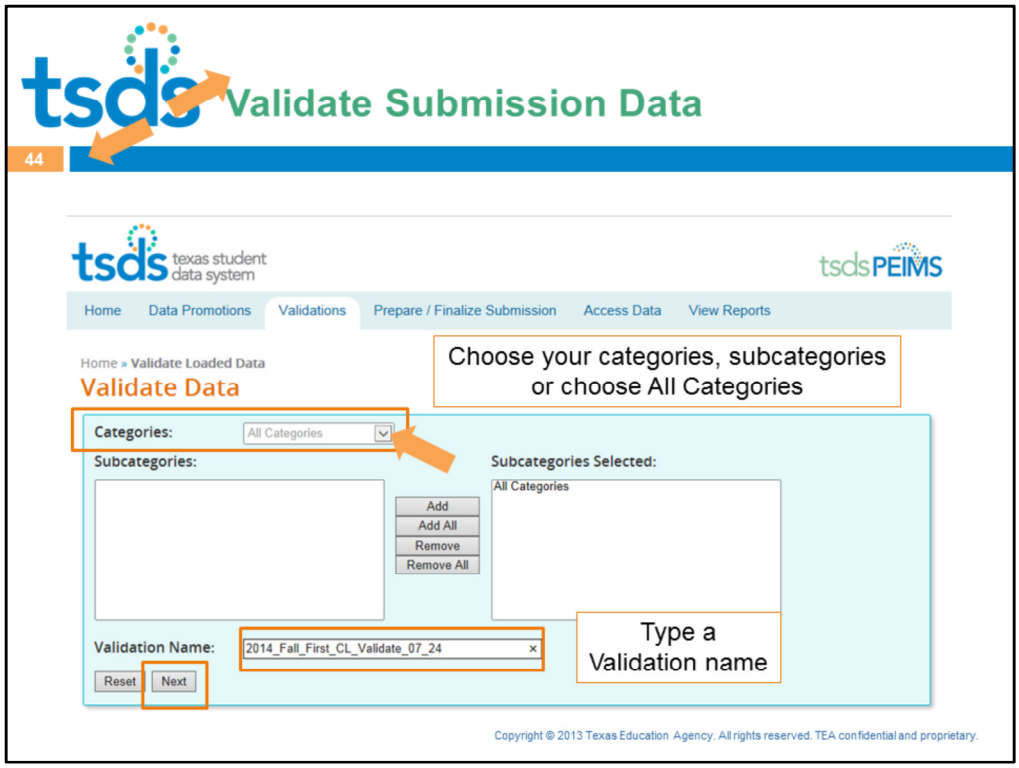
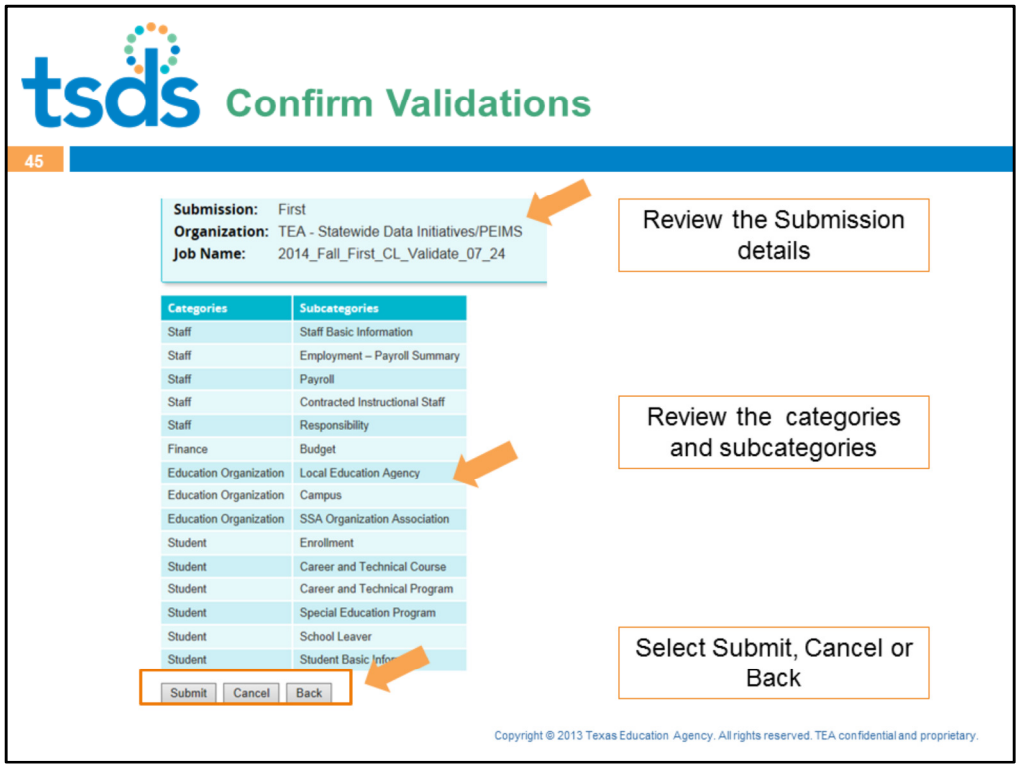
- This process will validate the data against TEDS



TSDS PEIMS Validate Submission Data will perform the same functions as the Legacy PEIMS Edit Plus Error Reports. The TSDS PEIMS Validate Submission Data will look at the PEIMS business rules and produce fatal and special warning errors.

Once we have selected the validate data menu option we need to specify what data set will be validated. The user must select or provide information for the following:

- Category: Staff, Finance, Ed Org, Student or All
- Subcategories
    - user can select Subcategories by Category
    - user can select Subcategories across Categories
- The user must enter the Validation Name
- Click reset to move backward or next to continue.



Categories	Subcategories
Staff	Staff Basic Information
Staff	Employment – Payroll Summary
Staff	Payroll
Staff	Contracted Instructional Staff
Staff	Responsibility
Finance	Budget
Education Organization	Local Education Agency
Education Organization	Campus
Education Organization	SSA Organization Association
Student	Enrollment
Student	Career and Technical Course
Student	Career and Technical Program
Student	Special Education Program
Student	School Leaver
Student	Student Basic Info

Once you have reviewed the parameters select Submit, Cancel or Back.

LEA Validation Errors

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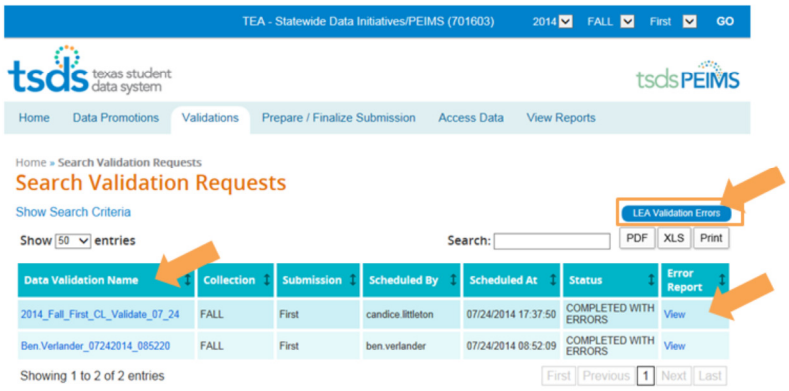
- Once your data has been submitted for validation, they system will return a status of In Progress, Completed or Completed with Errors.
- Click the LEA Validation Errors button to view the validation errors



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Once your data has been submitted for validation, they system will return a status of In Progress, Completed or Completed with Errors.
Click the LEA Validation Errors button to view the validation errors
Trainer's Notes: The column headers are sortable and the errors can be viewed by clicking on View under Error Report. We will look at Searching Validation Requests in the next section.

LEA Validation Errors

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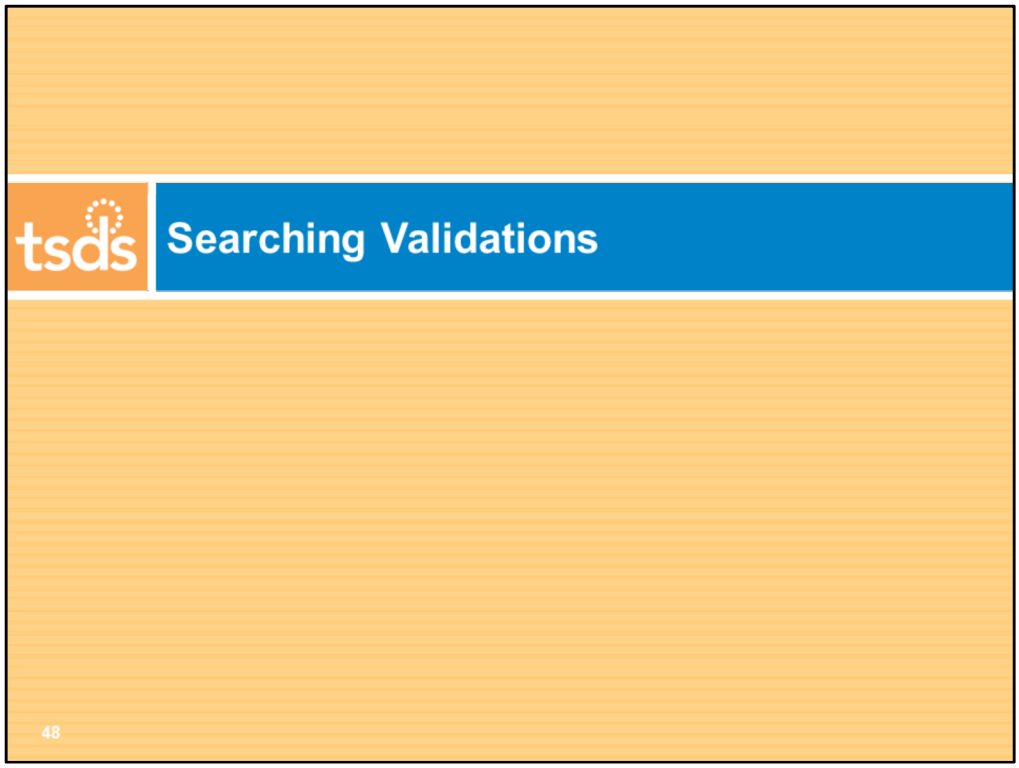
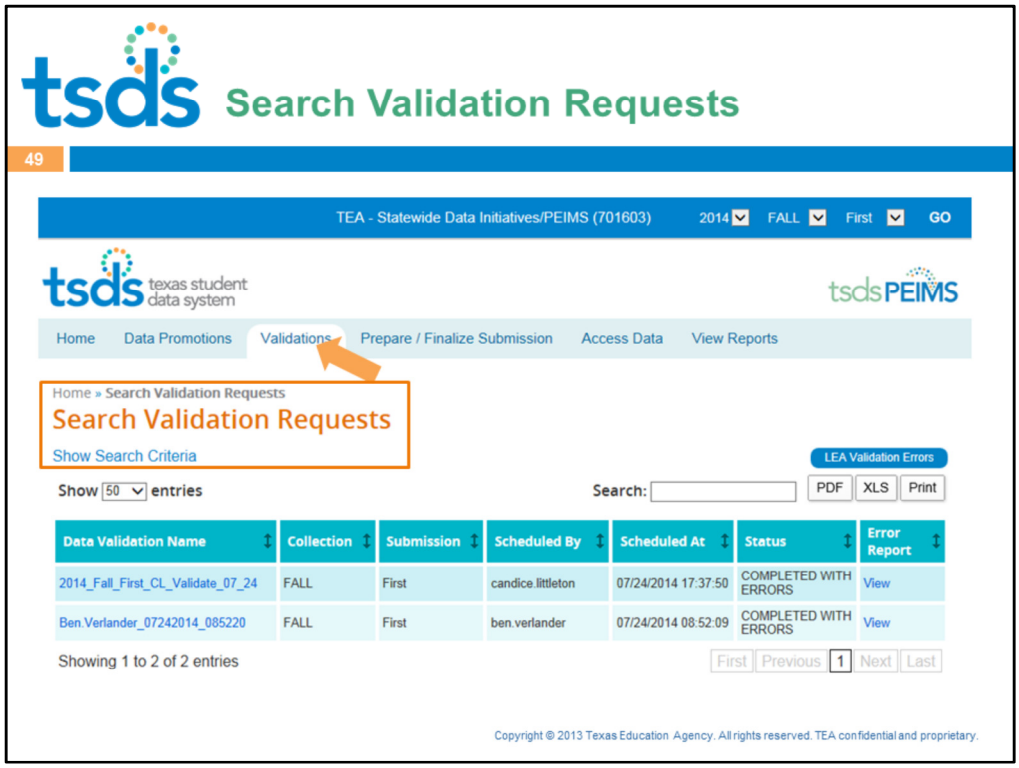
- Once your data has been validated, you can download your validation errors to an Excel file, PDF file or you can print the file.
- The column headers are sortable.

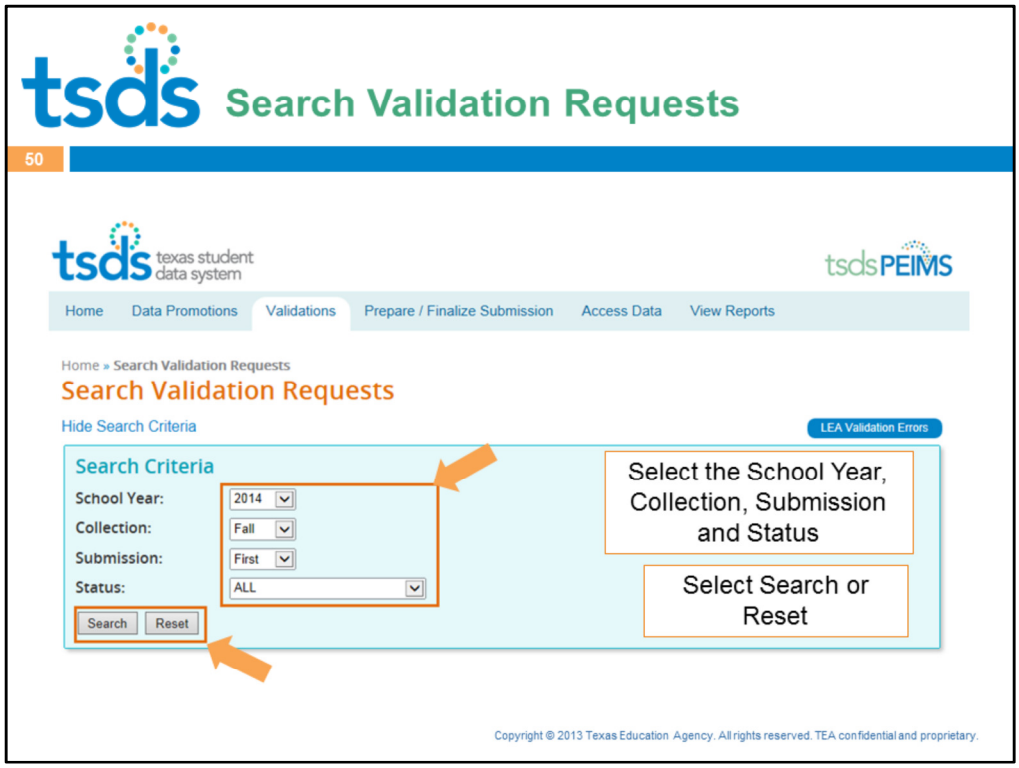
Once your data has been validated, you can download your validation errors to an Excel file, PDF file or you can print the file.
The column headers are sortable.



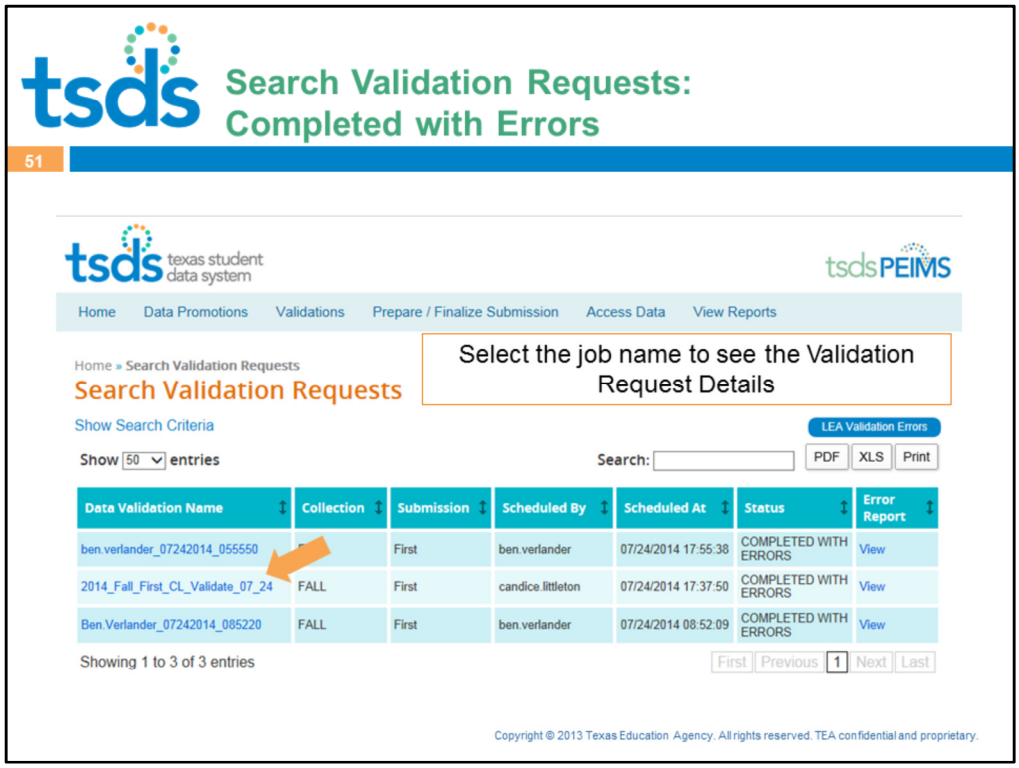
We can search the validations to look for fatal errors, special warnings or warnings.



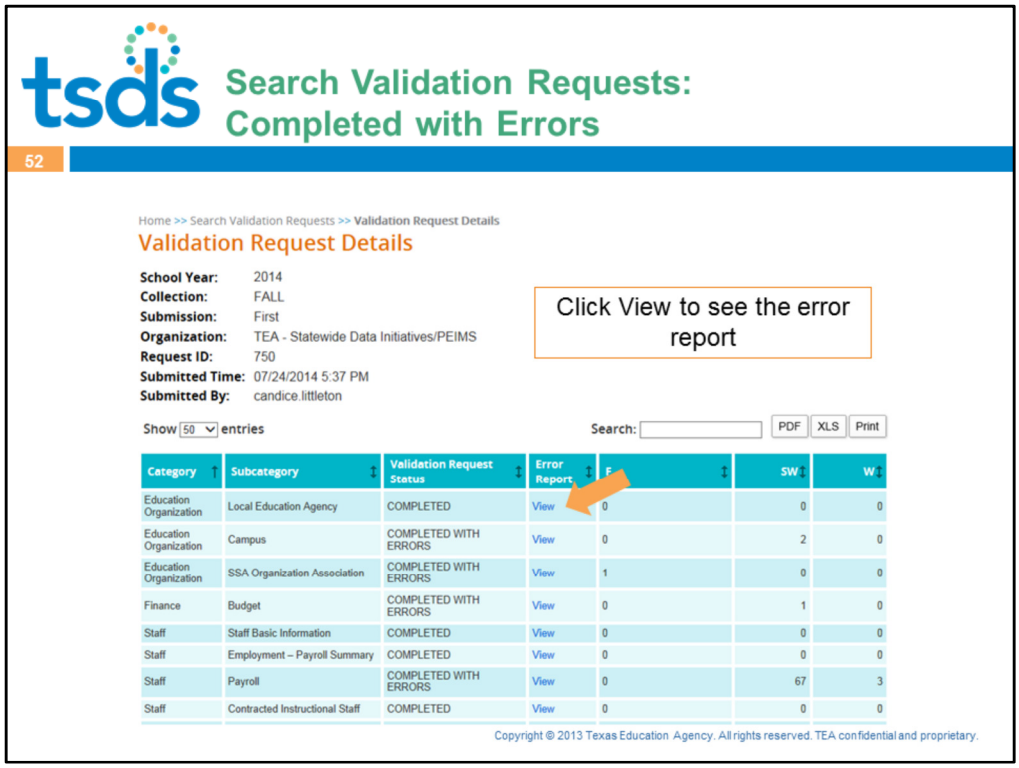
- Under Validations click Search Validation Requests and then select Show Search Criteria.



- Under Validations click Search Validation Requests and then select Show Search Criteria.
- Select the School Year, Collection, Submission and Status
- Select reset or next.



The user can select the Data Validation Name to drill down and see the Validation Request Details. From this screen, the user will also be able to view the Collection, Submission, the Scheduled by Information and the Submitted Date/Time along with the Status. Select view under Error Report to see the error details. The user can also click PDF or XLS to export a copy of the file. The user can also Print from this page.



In addition to the information provided in the previous screen, the user will also be able to view the Category, Subcategory, Validation Request Status and the Count of Fatals, Special Warnings and Warnings. Select view to see the error details. The user can also click PDF or XLS to download a copy of the file.

Validation Errors by Task

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- This screen displays the individual errors

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This screen displays the individual errors

Search Validation Requests: LEA Validation Errors

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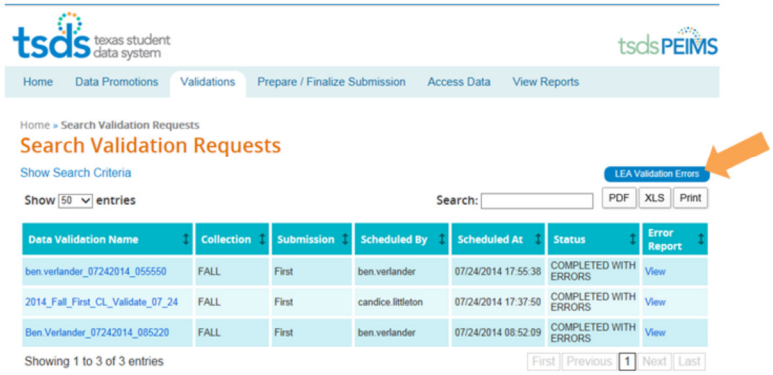
- Go back to Validations, and Search Validation Requests
- To see all of the Validation errors for your LEA, click the LEA Validation Errors button



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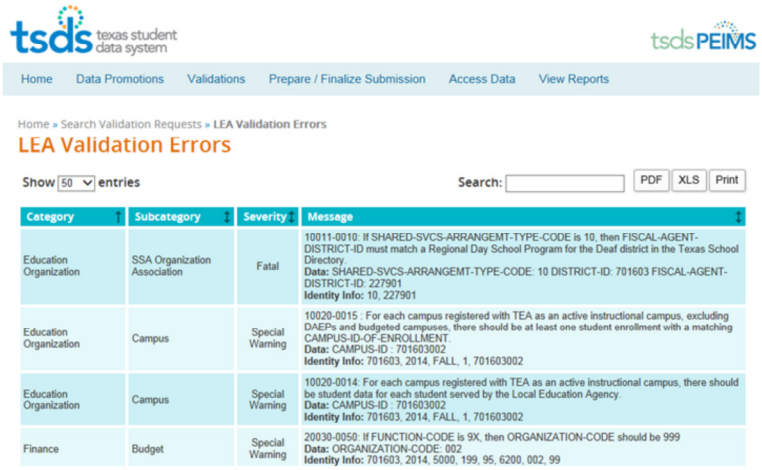
Go back to Validations, and Search Validation Requests
To see all of the Validation errors for your LEA, click the LEA Validation Errors button

LEA Validation Errors

55

- The LEA Validation Errors are displayed



Category	Subcategory	Severity	Message
Education Organization	SSA Organization Association	Fatal	10011-0010: If SHARED-SVCS-ARRANGEMT-TYPE-CODE is 10, then FISCAL-AGENT-DISTRICT-ID must match a Regional Day School Program for the Deaf district in the Texas School Directory. **Data:** SHARED-SVCS-ARRANGEMT-TYPE-CODE: 10 DISTRICT-ID: 701603 FISCAL-AGENT-DISTRICT-ID: 227901 **Identity Info:** 10, 227901
Education Organization	Campus	Special Warning	10020-0015 : For each campus registered with TEA as an active instructional campus, excluding DAEPs and budgeted campuses, there should be at least one student enrollment with a matching CAMPUS-ID-OF-ENROLLMENT. **Data:** CAMPUS-ID : 701603002 **Identity Info:** 701603, 2014, FALL, 1, 701603002
Education Organization	Campus	Special Warning	10020-0014: For each campus registered with TEA as an active instructional campus, there should be student data for each student served by the Local Education Agency. **Data:** CAMPUS-ID : 701603002 **Identity Info:** 701603, 2014, FALL, 1, 701603002
Finance	Budget	Special Warning	20030-0050: If FUNCTION-CODE is 9X, then ORGANIZATION-CODE should be 999 **Data:** ORGANIZATION-CODE: 002 **Identity Info:** 701603, 2014, 5000, 199, 95, 6200, 002, 99

The LEA Validation Errors are displayed

Validation Error Messages

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- The following Error Message in TSDS PEIMS may have multiple error message variations
  - Edit: 40110-000B: For a student Enrollment (Student School Association), the following must be provided: TX-UNIQUE-STUDENT-ID, CAMPUS-ID, GRADE-LEVEL-CODE, and STUDENT-ATTRIBUTION-CODE.
- Therefore, the edit numbers would be displayed as follows:
  - 40110-000B_1: (Error Message goes here.)
  - 40110-000B_2:
  - 40110-000B_3:
- See the next slide for the examples

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The following Error Message in TSDS PEIMS may have multiple error message variations

Edit: 40110-000B: For a student Enrollment (Student School Association), the following must be provided: TX-UNIQUE-STUDENT-ID, CAMPUS-ID, GRADE-LEVEL-CODE, and STUDENT-ATTRIBUTION-CODE.

Therefore, the edit numbers would be displayed as follows:

40110-000B_1: (Error Message goes here.)
40110-000B_2:
40110-000B_3:
40110-000B_4:

See the next slide for the examples

Validation Error Messages

57

If the Campus ID was missing, the error message would read:

- 40110-000B_1: For a student Enrollment (Student School Association), the following must be provided: TX-UNIQUE-STUDENT-ID, CAMPUS-ID, GRADE-LEVEL-CODE, and STUDENT-ATTRIBUTION-CODE.
- Data: CAMPUS-ID: null
- Identity Info: 2014, 701603, 123456789, XXXXX0123, Learner, Student

If the Grade level Code was missing, the error message would read:

- 40110-000B_2: For a student Enrollment (Student School Association), the following must be provided: TX-UNIQUE-STUDENT-ID, CAMPUS-ID, GRADE-LEVEL-CODE, and STUDENT-ATTRIBUTION-CODE.
- Data: GRADE-LEVEL-CODE: null
- Identity Info: 2014, 701603, 123456789, XXXXX0123, Learner, Student

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If the Campus ID was missing, the error message would read:
40110-000B_1: For a student Enrollment (Student School Association), the following must be provided: TX-UNIQUE-STUDENT-ID, CAMPUS-ID, GRADE-LEVEL-CODE, and STUDENT-ATTRIBUTION-CODE.
Data: CAMPUS-ID: null
Identity Info: 2014, 701603, 123456789, XXXXX0123, Learner, Student

If the Grade level Code was missing, the error message would read:
40110-000B_2: For a student Enrollment (Student School Association), the following must be provided: TX-UNIQUE-STUDENT-ID, CAMPUS-ID, GRADE-LEVEL-CODE, and STUDENT-ATTRIBUTION-CODE.
Data: GRADE-LEVEL-CODE: null
Identity Info: 2014, 701603, 123456789, XXXXX0123, Learner, Student

Validation Error Messages

58

If the Student-Attribution-Code was missing, the error message would read:

- 40110-000B_3: For a student Enrollment (Student School Association), the following must be provided: TX-UNIQUE-STUDENT-ID, CAMPUS-ID, GRADE-LEVEL-CODE, and STUDENT-ATTRIBUTION-CODE.
- Data: STUDENT-ATTRIBUTION-CODE: null
- Identity Info: 2014, 701603, 123456789, XXXXX0123, Learner, Student

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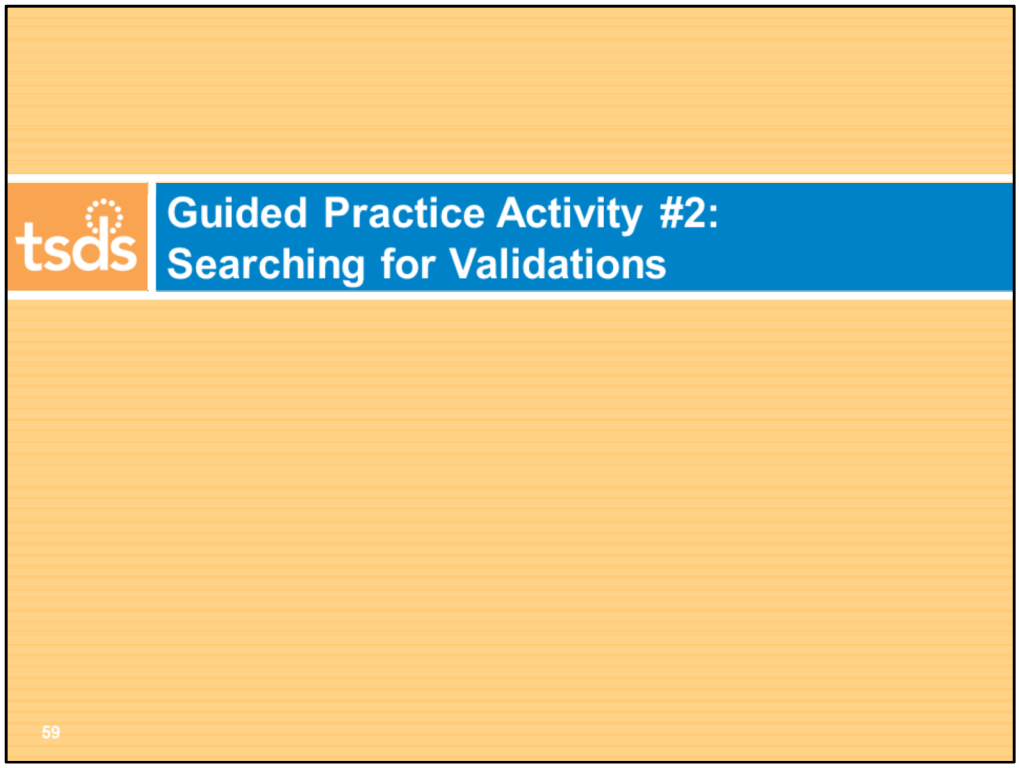
If the Student-Attribution-Code was missing, the error message would read:
40110-000B_3: For a student Enrollment (Student School Association), the following must be provided: TX-UNIQUE-STUDENT-ID, CAMPUS-ID, GRADE-LEVEL-CODE, and STUDENT-ATTRIBUTION-CODE.
Data: STUDENT-ATTRIBUTION-CODE: null
Identity Info: 2014, 701603, 123456789, XXXXX0123, Learner, Student



Lets give this a try. We will be using a simulation file with no audio and written directions. This will allow all of us to navigate the file in the room at the same time without headphones.

Guided Practice Activity#2: Searching for Validations

60

TASK: You will be working with your actual district data in the PEIMS Application, to search for data validations. You will interact directly with the software to search your data. Use the instructions in the Guided Practice Activities document to help you get started.

Let's log in to TEAL with the PEIMS Data Submitter role to begin. You will need to use the logins provided at the training session to complete this task.

Click Here to Begin

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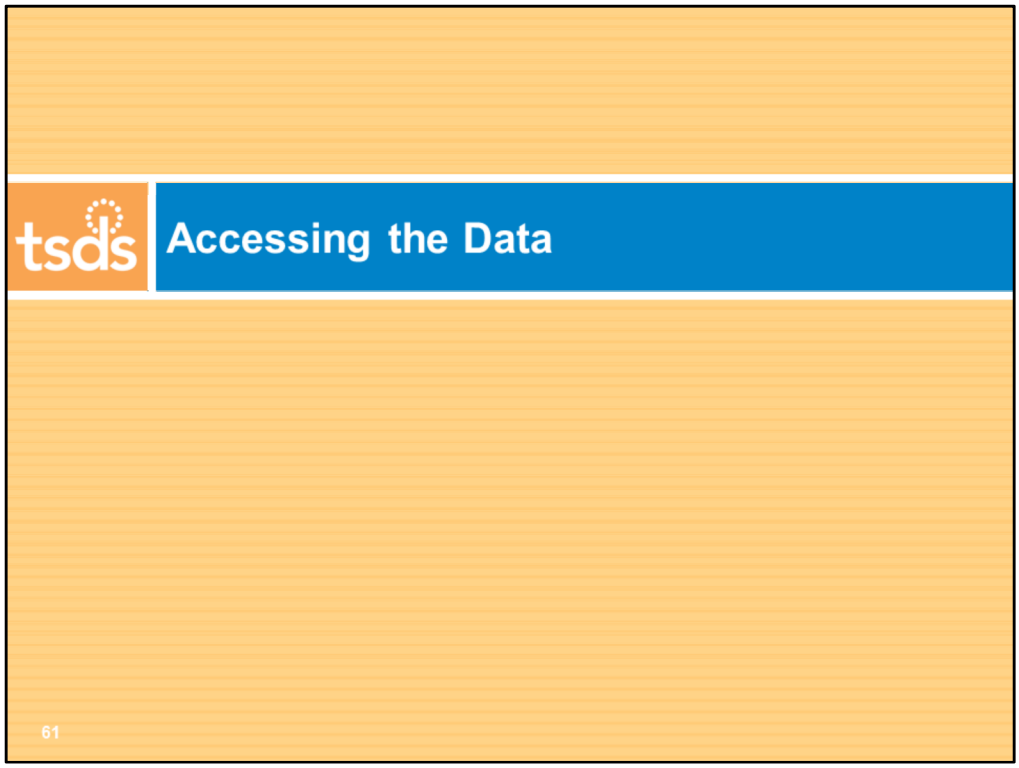
TASK: You will be working with your actual district data in the PEIMS Application, to search for data validations. You will interact directly with the software to search your data. Use the instructions in the Guided Practice Activities document to help you get started.

Let's log in to TEAL with the PEIMS Data Submitter role to begin. You will need to use the logins provided at the training session to complete this task.

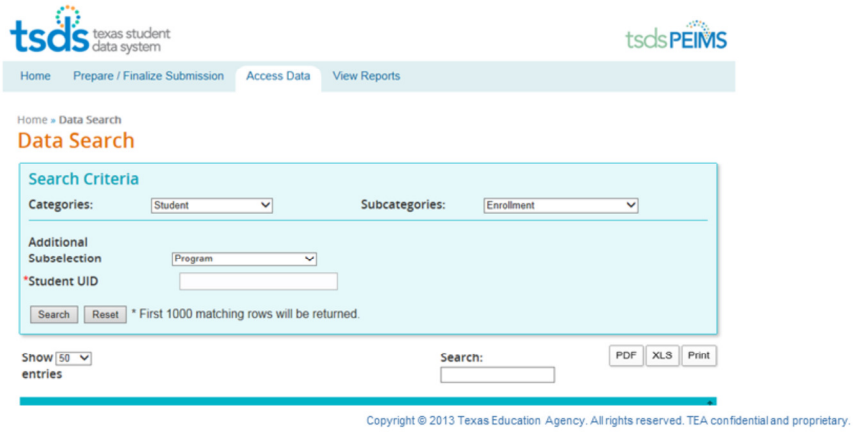


Accessing the Data

Access Data

62

- Use the Access Data tab to search for PEIMS data
- Use the PDF, XLS or Print button to download or print the data

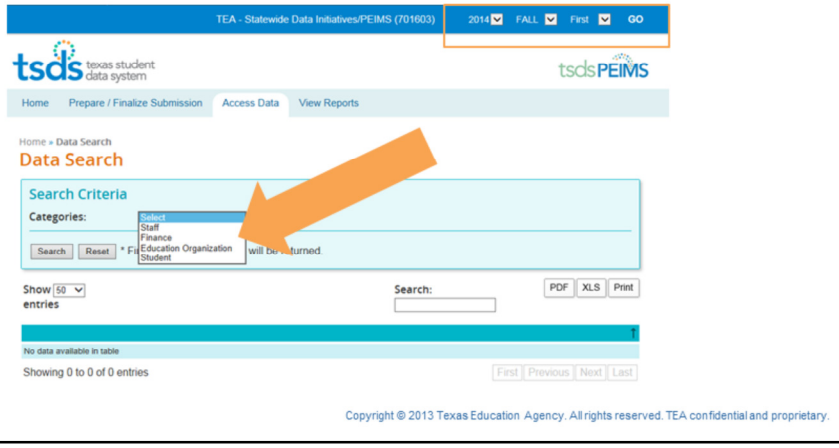


Use the Access Data tab to search for PEIMS data
Use the PDF, XLS or Print button to download or print the data

Access Data – Data Search: Student

63

- User can choose Access Data and search their PEIMS submission
- Select the collection you wish to search and then select the Category



User can choose Access Data and search their PEIMS submission files for student data
Select the collection you wish to search and then select the Category

Access Data – Data Search: Student

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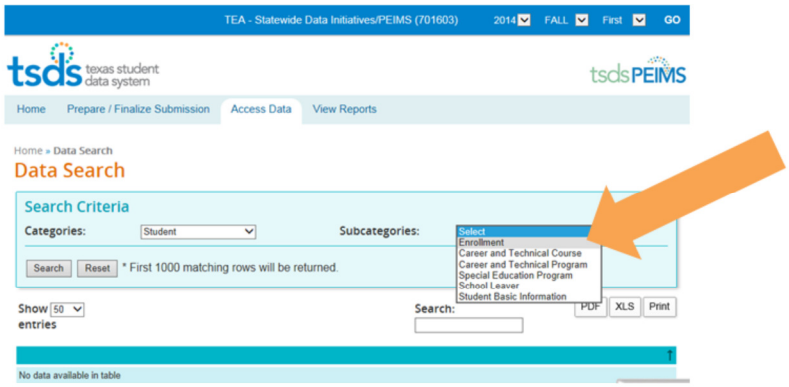
- Select the Subcategory: Enrollment



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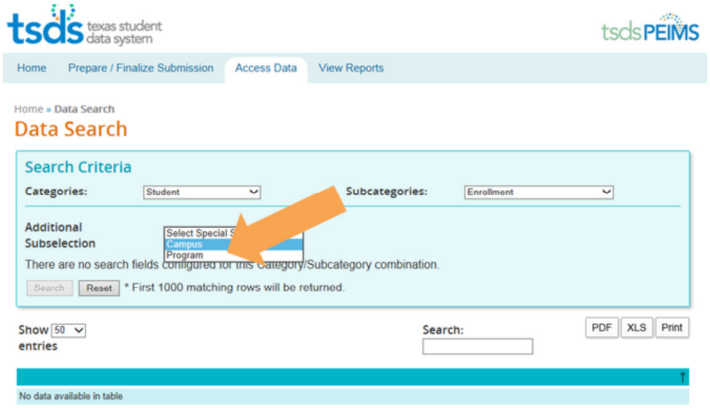
Select the Subcategory: Enrollment

Access Data – Data Search: Student

65

- Select Program



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Select Program

Access Data – Data Search: Student

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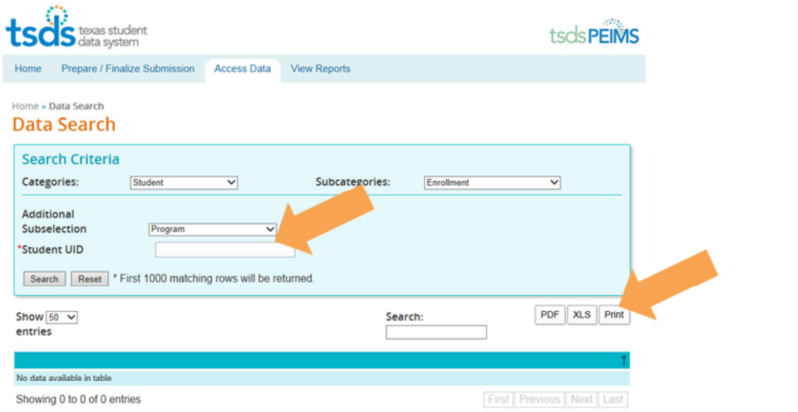
- Enter the Student UID and click Search
- The data can be downloaded to a PDF file, XLS file or Printed



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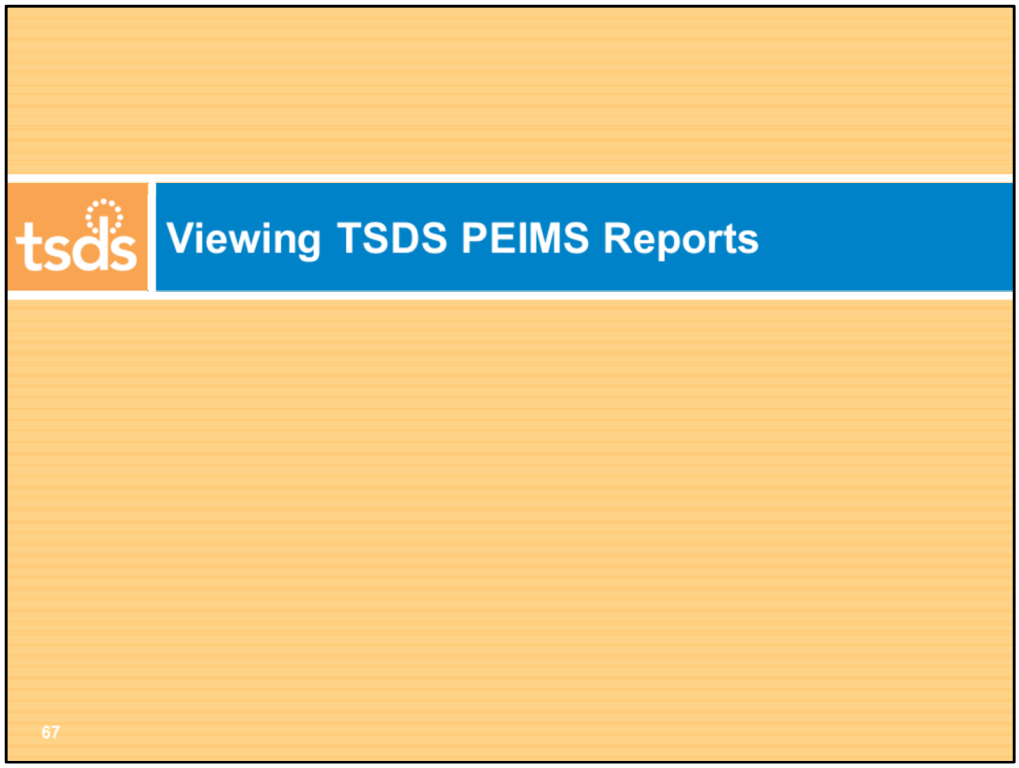
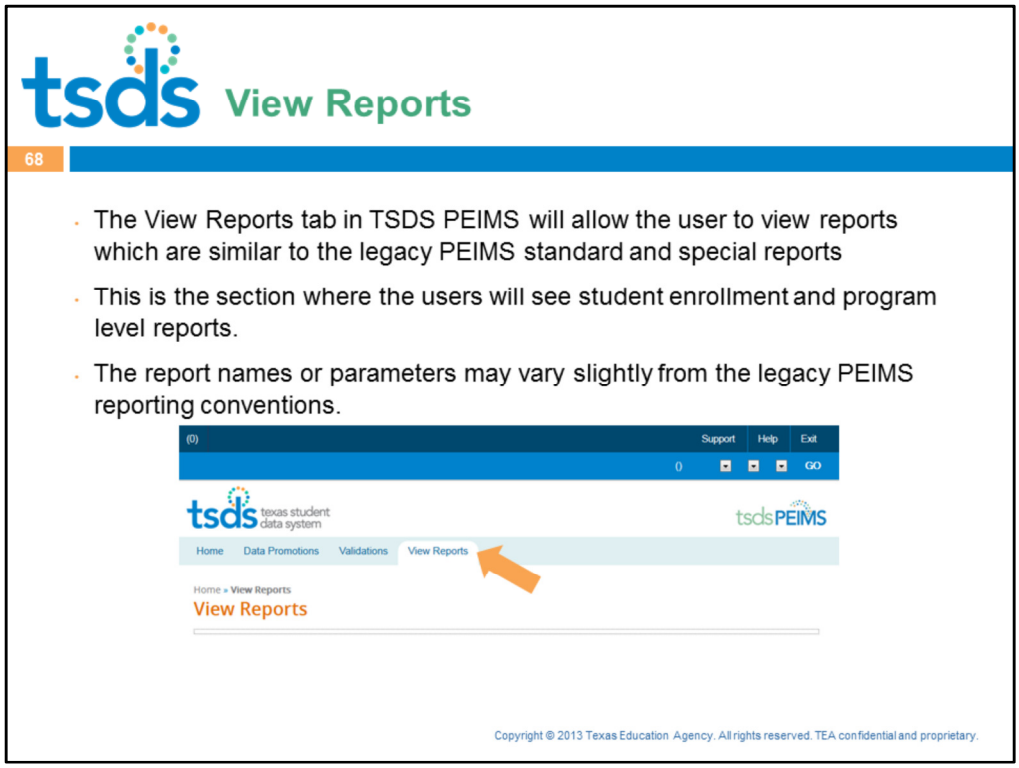
Enter the Student UID and click Search
The data can be downloaded to a PDF file, XLS file or Printed



Viewing TSDS PEIMS Reports



- The View Reports tab in TSDS PEIMS will allow the user to view reports which are similar to the legacy PEIMS standard and special reports in Edit Plus.
- This is the section where the users will see student enrollment and program level reports.
- The report names or parameters may vary slightly from the legacy PEIMS reporting conventions.

Clicking View Reports allows the user to see the collection of reports in TSDS PEIMS.

Trainer Notes: Users will need Flash on their computers to view the reports.

Reporting Categories

70

- The reporting categories are very similar to PEIMS legacy reports

Home » View Reports

View Reports

- Special Reports
  - District Level QA
  - Student Graduate
  - Summary
- Standard Reports
  - Budget
  - Budget Allocation
  - Career and Technical Education
  - Leaver
  - STAAR
  - Special Education
  - Staff
  - Staff Sensitive
  - Student
- Student Leaver Reports
  - Record Submission Support

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The reporting categories are very similar to PEIMS legacy reports

Trainer Questions:

1) What information can we find under the Standard Reports?
2) What information can we find under Special Reports?
3) Who has access to the reports? PEIMS Data Submitter, Promoter, Completer, Approver, Accepter

Standard Report Samples

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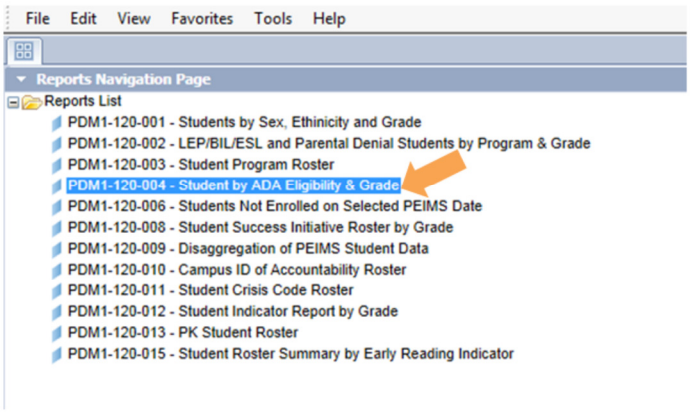
- The Reports Navigation Page window will pop up.
- The Reports Navigation window contains the list of available reports



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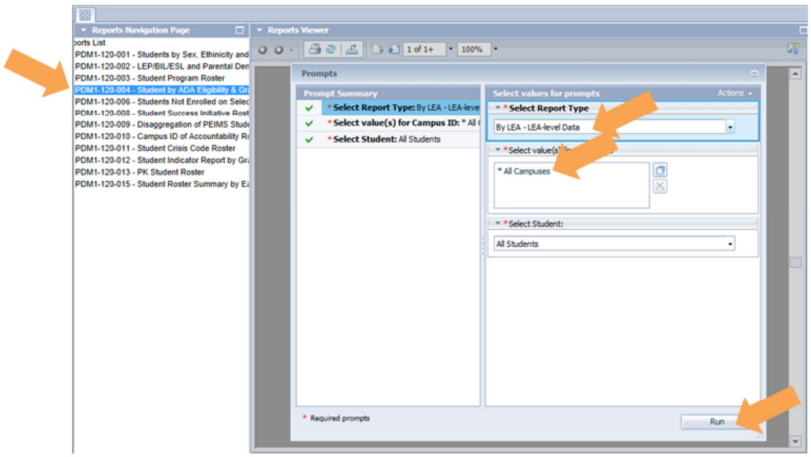
The Reports Navigation Page window will pop up.
The Reports Navigation window contains the list of available reports

Standard Report Samples

72

- The user selects the report and selects LEA Level Data or Campus Level Data. The user will then specify which Campus or All Campuses.



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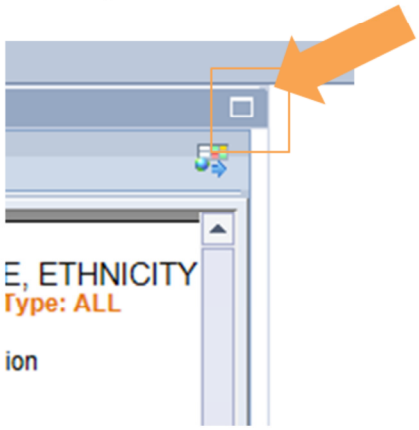
The user selects the report and selects LEA Level Data or Campus Level Data. The user will then specify which Campus or All Campuses.

Maximize the Report Window

73

- Click the Maximize button in the upper right hand corner of the report window to maximize the report.



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Click the Maximize button to maximize the report.

Students by ADA Eligibility Report

74

- The report will generate.

Texas Education Agency
PDM1-120-004
v14.1.1

LEA: 701603 - SEDS LEARNING ISD

TSDS PEIMS STUDENT BY ADA ELIGIBILITY AND GRADE
LEA-level Data | All Students
Campuses: ALL
2013 - 2014 Fall Collection

Thursday 07/24/2014 5:51 PM
Page 1 of 1

ADA Eligibility Code	EE	PK	KG	01	02	03	04	05	06	07	08	09	10	11	12	Total	%
0	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3	0.7%
1	0	0	27	21	26	23	29	36	31	34	30	27	30	39	28	383	92.7%
2	0	9	0	0	0	0	0	0	0	0	0	0	0	0	0	9	2.2%
3	0	0	1	0	0	1	1	0	1	1	0	0	1	0	0	6	1.5%
5	0	12	0	0	0	0	0	0	0	0	0	0	0	0	0	12	2.9%
Total	3	21	28	21	28	24	30	36	32	35	30	27	31	39	28	413	100.0%
Percent	0.7%	5.1%	6.8%	5.1%	6.8%	5.8%	7.3%	8.7%	7.7%	8.5%	7.3%	6.5%	7.5%	9.4%	6.8%	100.0%	

Last Refreshed : July 24, 2014 4:51:07 PM GMT-06:00

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The report will generate.

LEP/BIL/ESL and Parental Denials

75

- The reports are very similar to the Legacy PEIMS reports.

Texas Education Agency
PDM1-120-002
v14.1.1

TSDS PEIMS LEP/BIL/ESL AND PARENTAL DENIAL STUDENTS BY PROGRAM AND GRADE
LEA-level Data
Campuses: ALL
2013 - 2014 Fall Collection

Thursday 07/24/2014 5:50 PM
Page 1 of 1

LEA: 701603 - SEDS LEARNING ISD

BILINGUAL, ESL AND PARENTAL DENIAL STUDENTS

EE	PK	KG	1	2	3	4	5	6	7	8	9	10	11	12	Total	%

* * * No Data To Report * * *

LEP STUDENTS BY HOME LANGUAGE

EE	PK	KG	1	2	3	4	5	6	7	8	9	10	11	12	Total	%

* * * No Data To Report * * *

Total Enrollment	413	100.0

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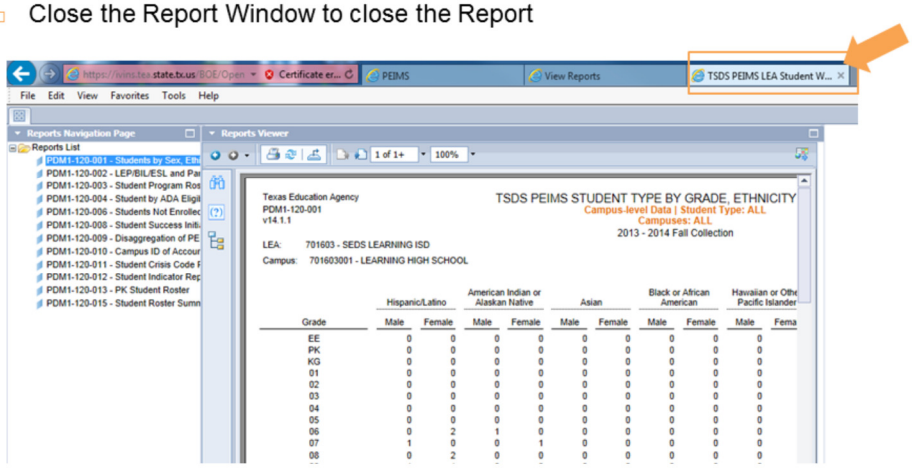
The reports are very similar to the Legacy PEIMS reports.

Closing the Report

76

- Close the Report Window to close the Report



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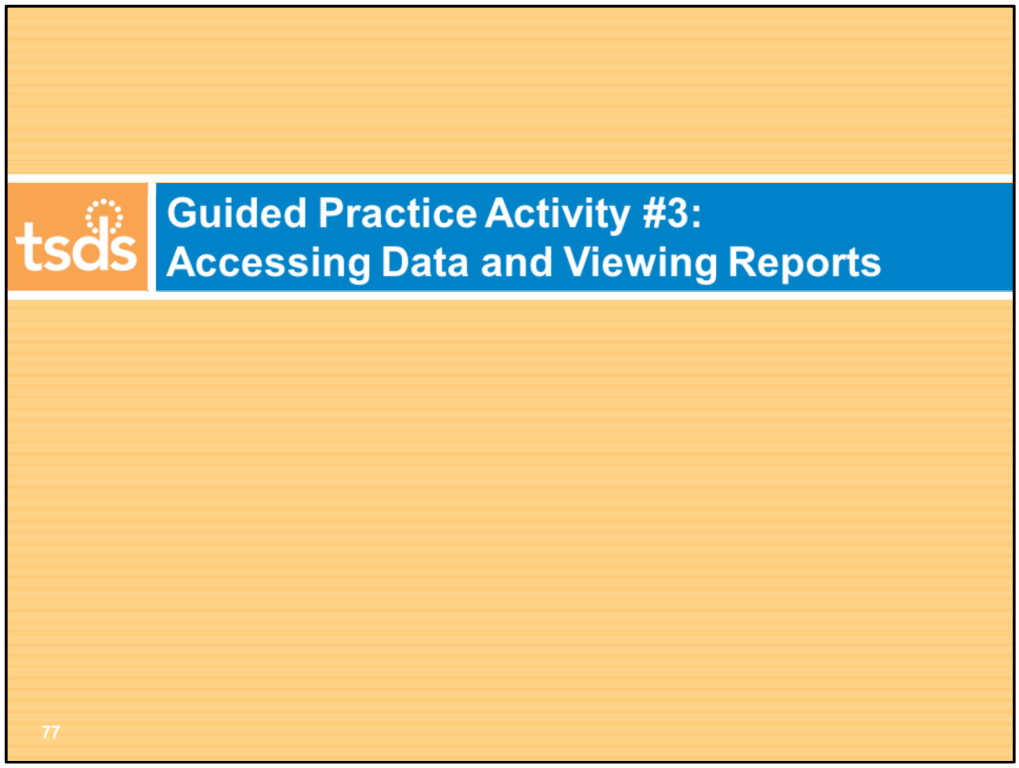
Close the Report Window to close the Report



Guided Practice Activity #3:
Accessing Data and Viewing Reports

Guided Practice Activity #3: Accessing Data and Viewing Reports

78

TASK: You will be working with your actual district data in the PEIMS Application, to access your data and view reports. You will interact directly with the software to search your data. Use the instructions in the Guided Practice Activities document to help you get started.

Let's log in to TEAL with the PEIMS Data Submitter role to begin. You will need to use the logins provided at the training session to complete this task.

Click Here to Begin

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TASK: You will be working with your actual district data in the PEIMS Application, to access your data and view reports. You will interact directly with the software to search your data. Use the instructions in the Guided Practice Activities document to help you get started.

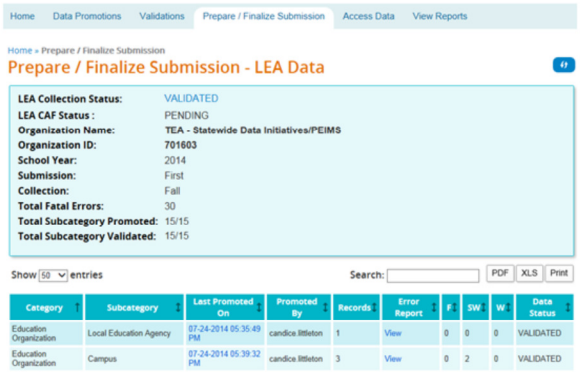
Prepare and Finalize

Prepare and Finalize

80

PEIMS Data Submitter View

- The prepare and finalize tab shows the detailed data status for the submission. The view we see on this screenshot is for the PEIMS Data Submitter



PEIMS Data Submitter View

The prepare and finalize tab shows the detailed data status for the submission. The view we see on this screenshot is for the PEIMS Data Submitter.

The Prepare and Finalize section is where the PEIMS Data Completer can mark the data submission complete, the PEIMS Data Approver can mark the data submission Approved and the PEIMS Data Accepter can mark the data submission Accepted.

Completing the Data Submission

81

Completing the Data Submission

Data Submission is Ready or Verified

82

- Once the data is free from all Fatal errors and all warnings and special warnings have been reviewed, the PEIMS Campus Submitter can mark the PEIMS data submission as 'ready' or 'verified' at the school level. This step is optional.
- The PEIMS Campus Submitter cannot mark the data 'Complete".
- 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.

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Once the data is free from all Fatal errors and all warnings and special warnings have been reviewed, the PEIMS Campus Submitter can mark the PEIMS data submission as 'ready' or 'verified' at the school level. This step is optional.
The PEIMS Campus Submitter cannot mark the data 'Complete".
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.

Complete or Reject the Data Submission

83

- The PEIMS Data Completer can review the data and mark it Complete.
- The data file must contain the entire district submission to mark it Complete.
- The system will now run validations again to be sure there are no fatal errors. If a category or subcategory has fatal errors the system will report this and they will need to be fixed before the data can be marked complete.
- The user will have to acknowledge the special warnings.
- The data can be marked complete with special warnings and warnings.
- If the data needs additional work, the PEIMS Data Completer can mark it rejected.

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The PEIMS Data Completer can review the data and mark it Complete.
The data file must contain the entire district submission to mark it Complete.
The system will now run validations again to be sure there are no fatal errors. If a category or subcategory has fatal errors the system will report this and they will need to be fixed before the data can be marked complete.
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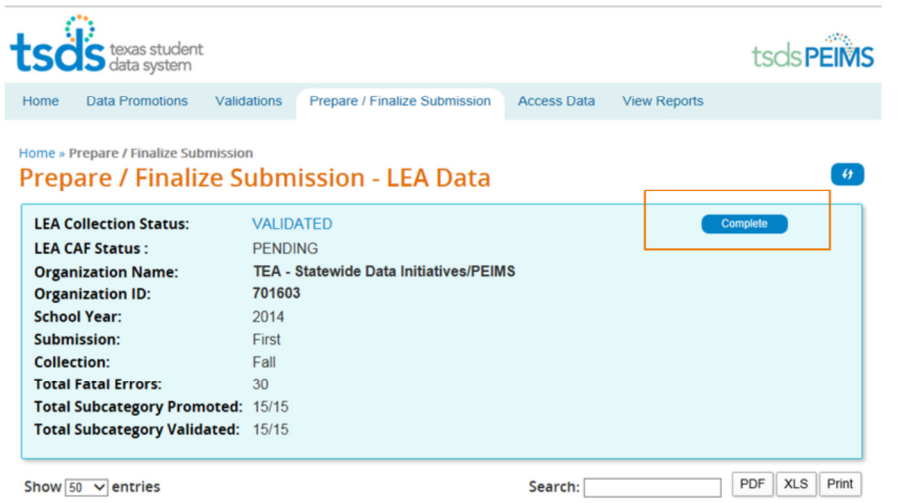
If the data needs additional work, the PEIMS Data Completer can mark it rejected.

Complete Submission View

84



Select Complete

Completion Process Status

85

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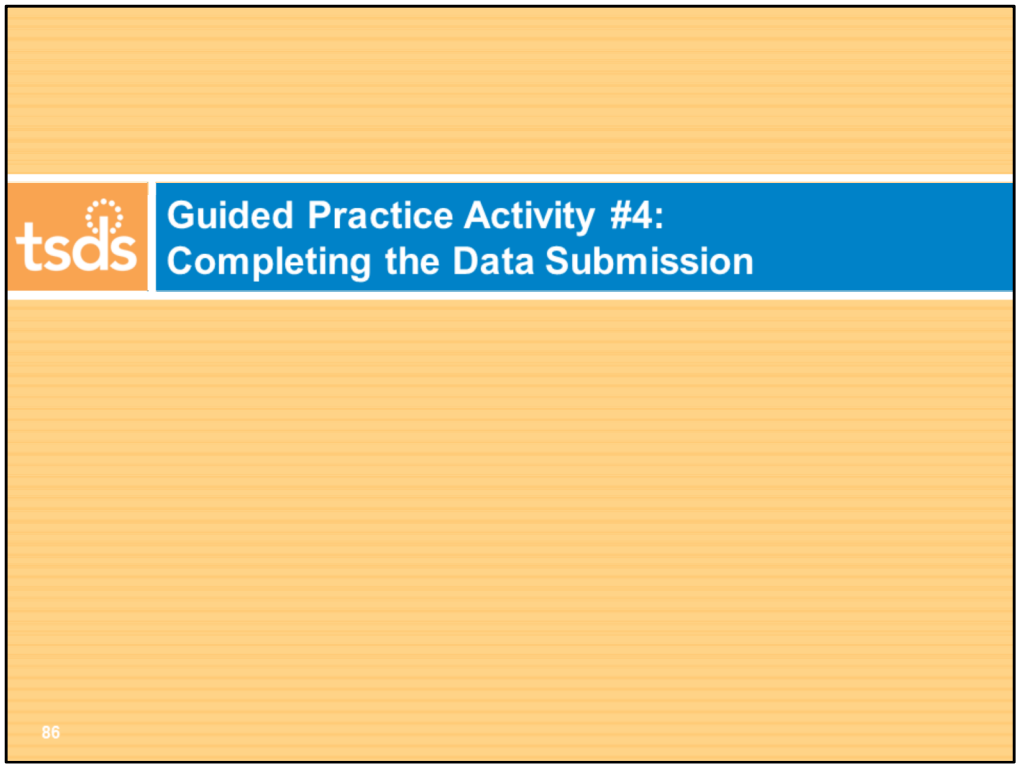
The system will display the completion process status.



Guided Practice Activity #3:
Completing the Data Submission

Guided Practice Activity #4: Completing the Data Submission

87

TASK: You will be working with your actual district data in the PEIMS Application, ***to mark the submission complete.*** You will interact directly with the software to search your data. Use the instructions in the Guided Practice Activities document to help you get started.

Let's log in to TEAL with the PEIMS Data Completer role to begin. You will need to use the logins provided at the training session to complete this task.

Log into TEAL as the PEIMS Data Completer and select the Texas Student Data System Portal.

Click Here to Begin

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TASK: You will be working with your actual district data in the PEIMS Application, ***to mark the submission complete.*** You will interact directly with the software to search your data. Use the instructions in the Guided Practice Activities document to help you get started.
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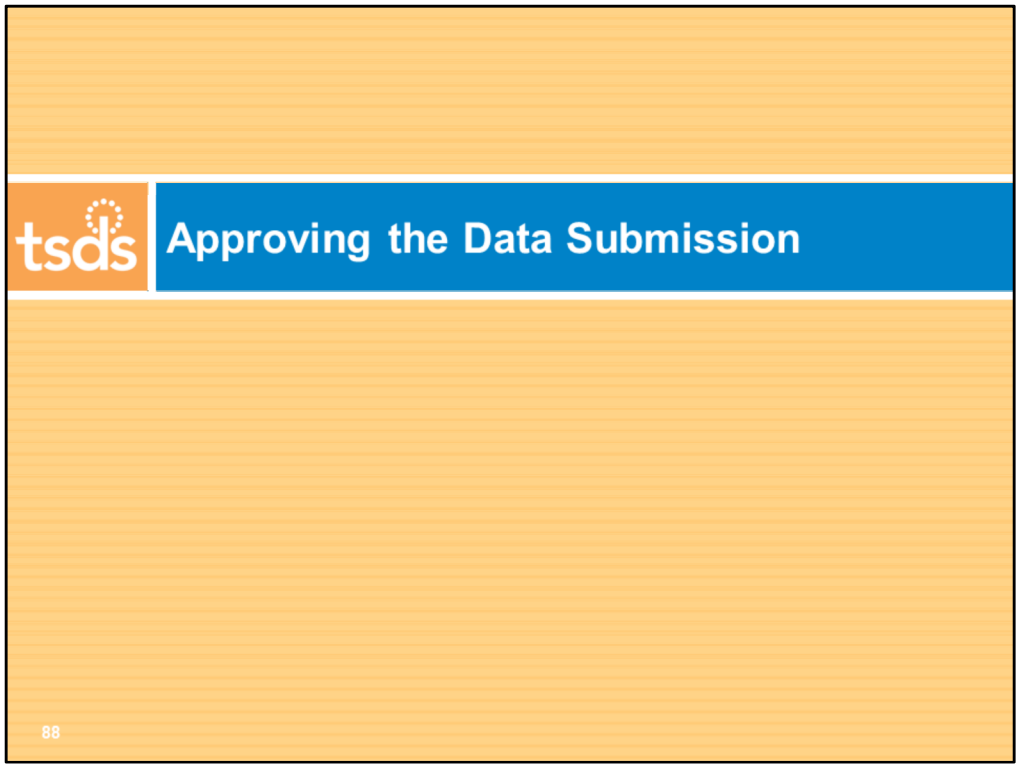
Log into TEAL as the PEIMS Data Completer and select the Texas Student Data System Portal.



Approving the Data Submission

Approving the Data Submission

89

- Once all of the data has been review and marked 'Complete', the PEIMS Data Approver can mark the data 'Approved'.
- The LEA Approval process happens parallel with the Superintendent Approval Form (SAF).
- If there are problems with the data the PEIMS Data Approver can 'Reject' the file.

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Once all of the data has been review and marked 'Complete', the PEIMS Data Approver can mark the data 'Approved'.
The LEA Approval process happens parallel with the Superintendent Approval Form (SAF).
If there are problems with the data the PEIMS Data Approver can 'Reject' the file.

Superintendent Approval Form (SAF)

90

- The Superintendent logs into TEAL to sign the SAF for the PEIMS submission.
- The Regional Education Service Center Executive Director would also sign the SAF from for the ESC PEIMS Data Submission.
- There is only one person per LEA who can have SAF access.
- This action runs parallel to the Approval action.

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The Superintendent logs into TEAL to sign the SAF for the PEIMS submission.
The Regional Education Service Center Executive Director would also sign the SAF from for the ESC PEIMS Data Submission.
There is only one person per LEA who can have SAF access.
This action runs parallel to the Approval action.

Requesting an Extension

91

- Only the Superintendent can request an extension.
- This will be part of the August release and won't be visible in the current version of the PEIMS Data Mart.
- The district must have extenuating circumstances in order to receive an extension from TEA.

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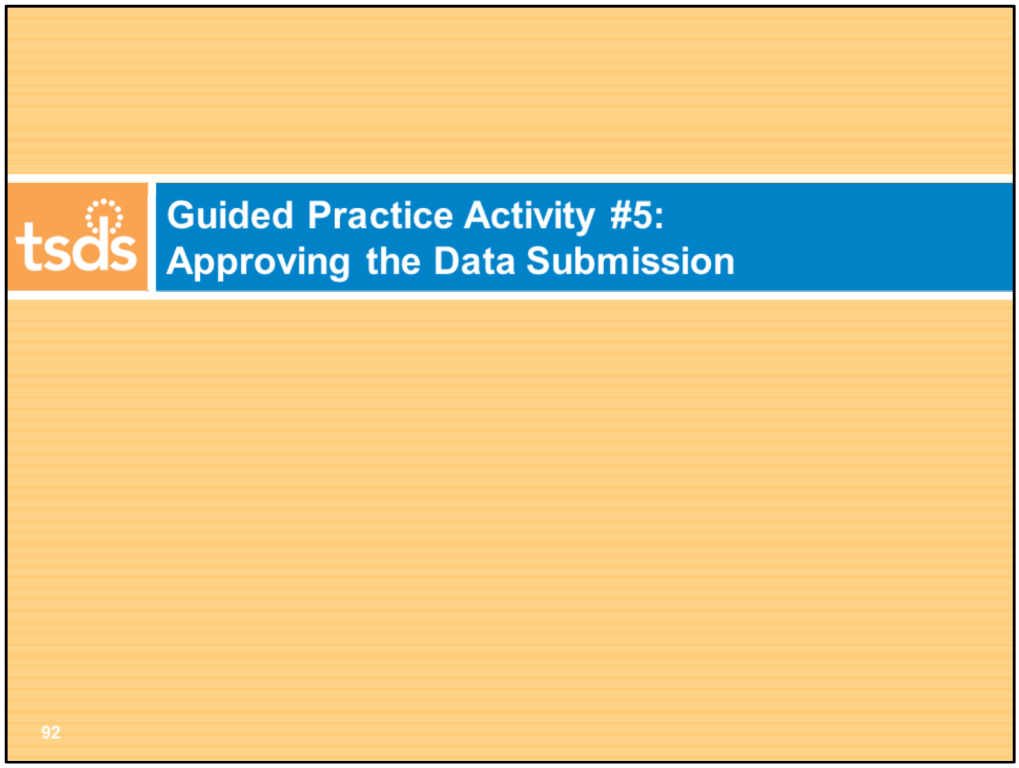
Only the Superintendent can request an extension.
This will be part of the August release and won't be visible in the current version of the PEIMS Data Mart.
The district must have extenuating circumstances in order to receive an extension from TEA.



Guided Practice Activity #4:
Approving the Data Submission

Guided Practice Activity #5: Approving the Data Submission

93

TASK: You will be working with your actual district data in the PEIMS Application, ***to mark the submission as approved.*** You will interact directly with the software to search your data. Use the instructions in the Guided Practice Activities document to help you get started.

Let's log in to TEAL with the PEIMS Data Approver role to begin. You will need to use the logins provided at the training session to complete this task.

Log into TEAL with the PEIMS Data Approver role and select the Texas Student Data System Portal.

Click Here to Begin

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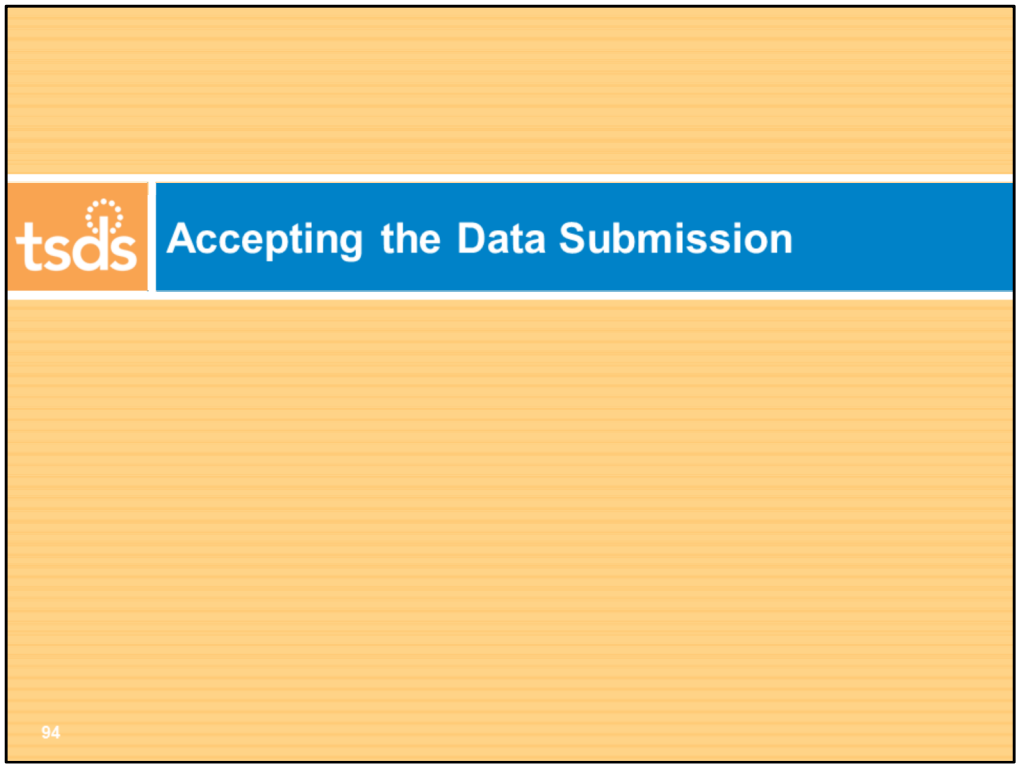
TASK: You will be working with your actual district data in the PEIMS Application, ***to mark the submission as approved.*** You will interact directly with the software to search your data. Use the instructions in the Guided Practice Activities document to help you get started.
Let's log in to TEAL with the PEIMS Data Approver role to begin. You will need to use the logins provided at the training session to complete this task.
Log into TEAL with the PEIMS Data Approver role and select the Texas Student Data System Portal.



Accepting the Data Submission

Accepting the Data Submission

95

- The PEIMS Data Accepter (ESC) can accept the LEA Data Submission.
- The ESC PEIMS coordinator will use TEAL role of PEIMS Data Accepter to perform this function.
- Currently the ESC can only see the LEA view for Acceptance.
- In August the ESC will be able to see the multi-district view which contains a list of all of the LEAs in their Region.

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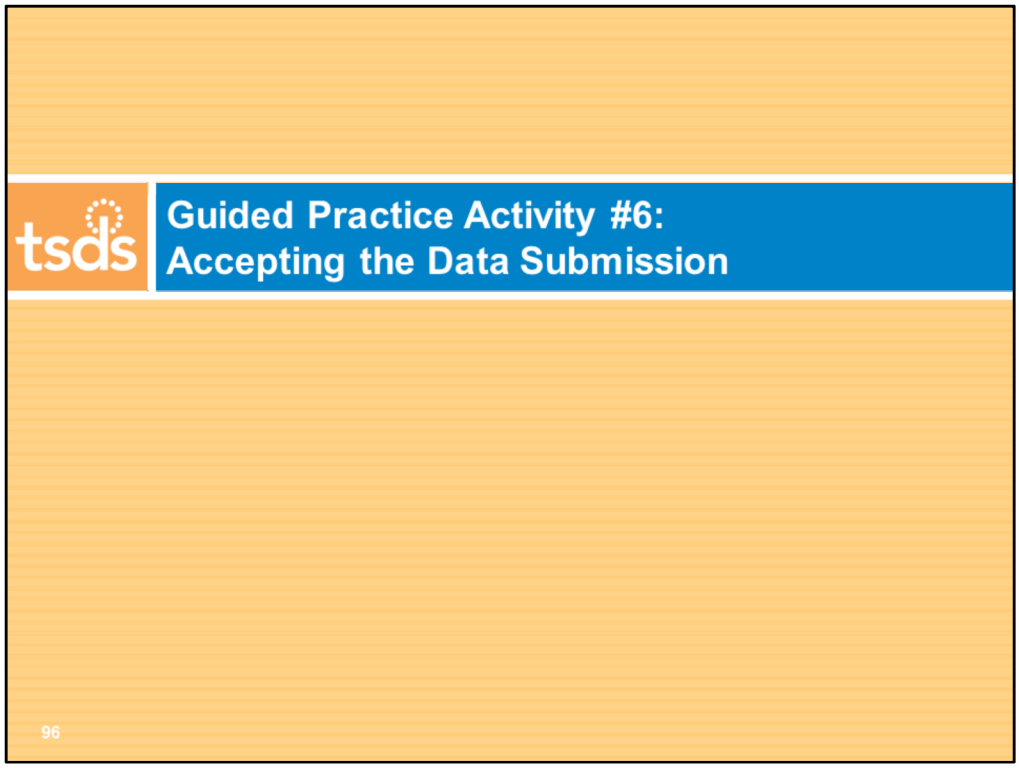
The PEIMS Data Accepter (ESC) can accept the LEA Data Submission.
The ESC PEIMS coordinator will use TEAL role of PEIMS Data Accepter to perform this function.
Currently the ESC can only see the LEA view for Acceptance.
In August the ESC will be able to see the multi-district view which contains a list of all of the LEAs in their Region.



Guided Practice Activity #5:
Accepting the Data Submission

Guided Practice Activity #6: Accepting the Data Submission

97

TASK: You will be working with your actual district data in the PEIMS Application, ***to mark the submission as accepted.*** You will interact directly with the software to search your data. Use the instructions in the Guided Practice Activities document to help you get started.

Let's log in to TEAL with the PEIMS Data Accepter role to begin. You will need to use the logins provided at the training session to complete this task.

Log into TEAL with the PEIMS Data Accepter role and select the Texas Student Data System Portal.

Click Here to Begin

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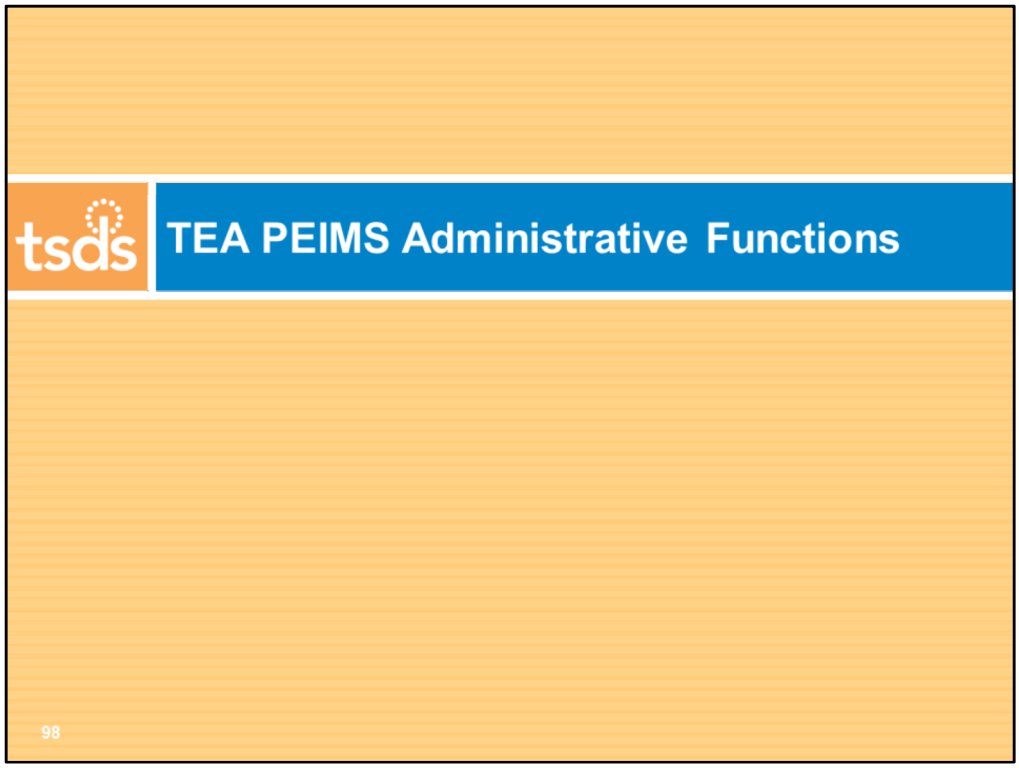
TASK: You will be working with your actual district data in the PEIMS Application, ***to mark the submission as accepted.*** You will interact directly with the software to search your data. Use the instructions in the Guided Practice Activities document to help you get started.
Let's log in to TEAL with the PEIMS Data Accepter role to begin. You will need to use the logins provided at the training session to complete this task.
Log into TEAL with the PEIMS Data Accepter role and select the Texas Student Data System Portal.



TEA PEIMS Administrative Functions

TEA PEIMS Administrative Functions

99

TEA Administrators can:

- Configure Collections
  - 2014 Fall First
  - 2014 Fall Resub
  - 2014 MDYR 2014 First
  - 2014 MDYR Resub
  - 2014 TSDS
- Manage Reports
- Approve Extensions
- Track Data Collections
- Load to PDM

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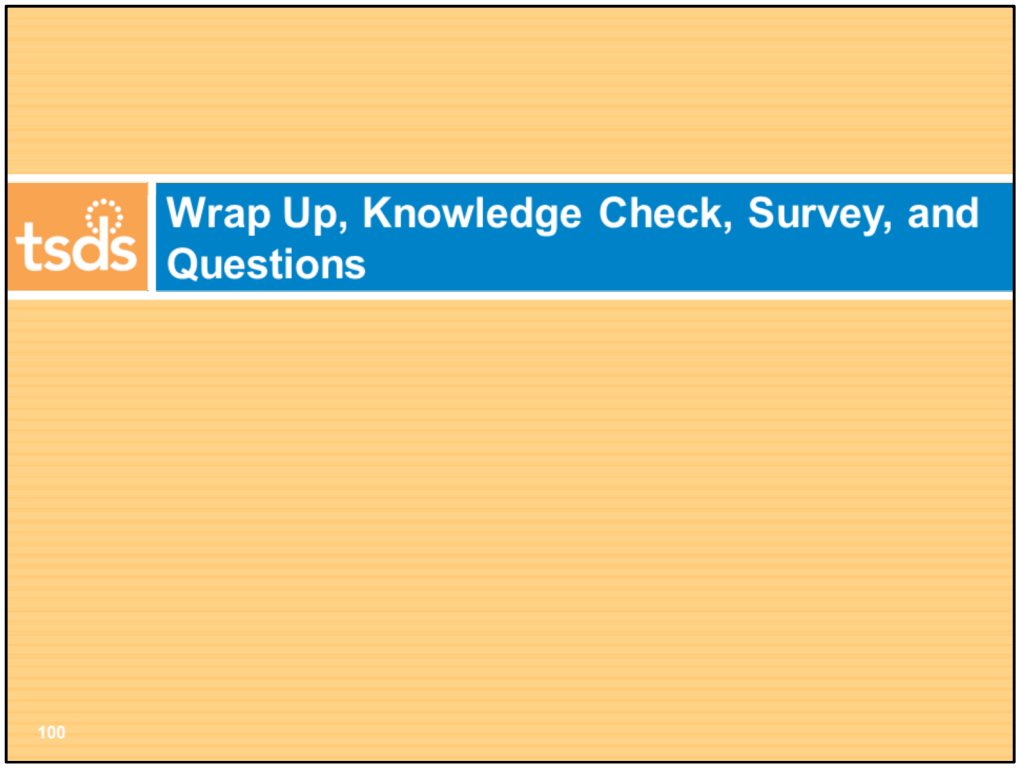
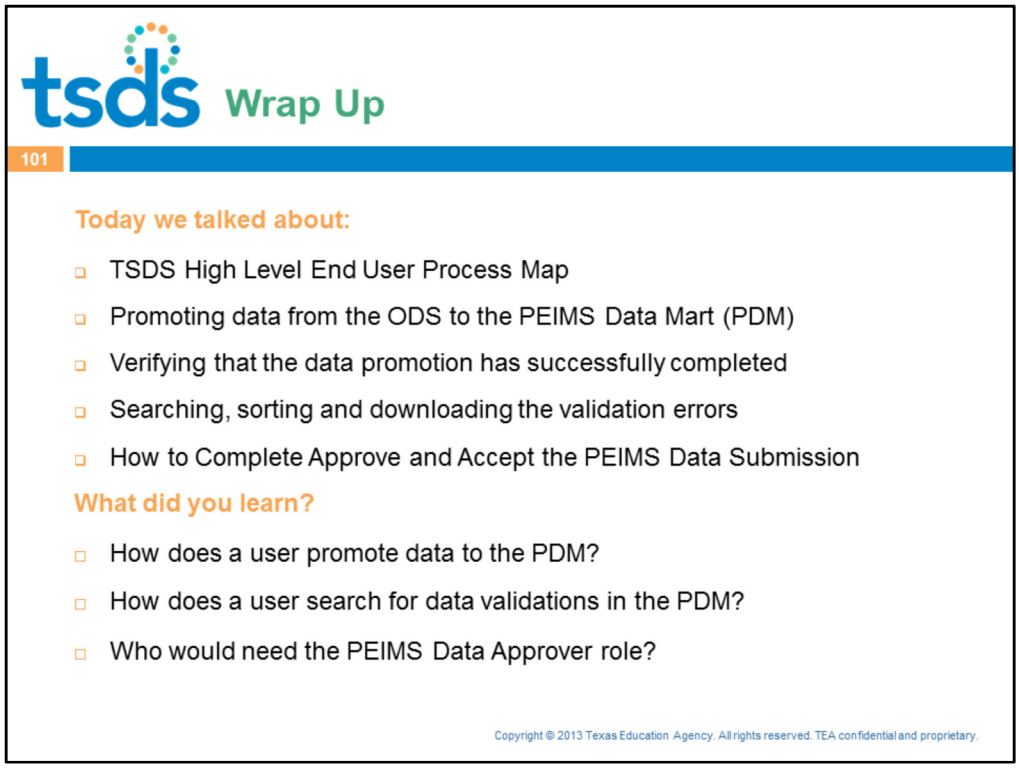
TEA Administrators can:
Configure Collections
2014 Fall First
2014 Fall Resub
2014 MDYR 2014 First
2014 MDYR Resub
2014 TSDS
Manage Reports
Approve Extensions
Track Data Collections
Load to PDM



Now it is time for a quick Wrap Up, Knowledge Check, Survey, and Questions

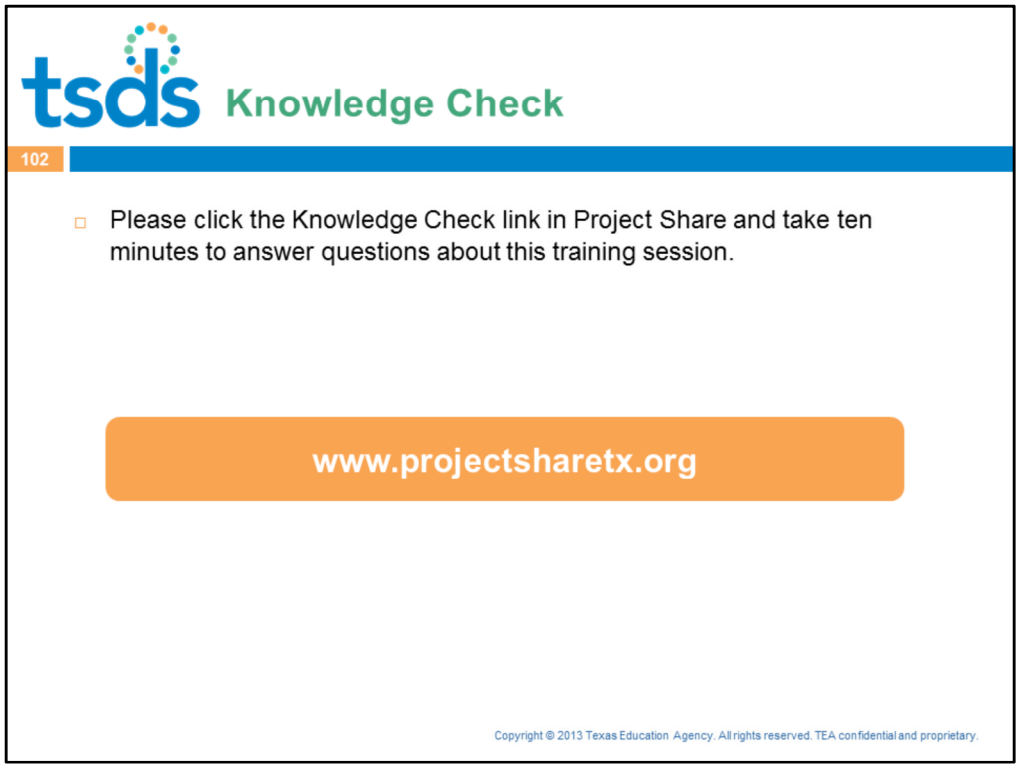


Today we talked about:

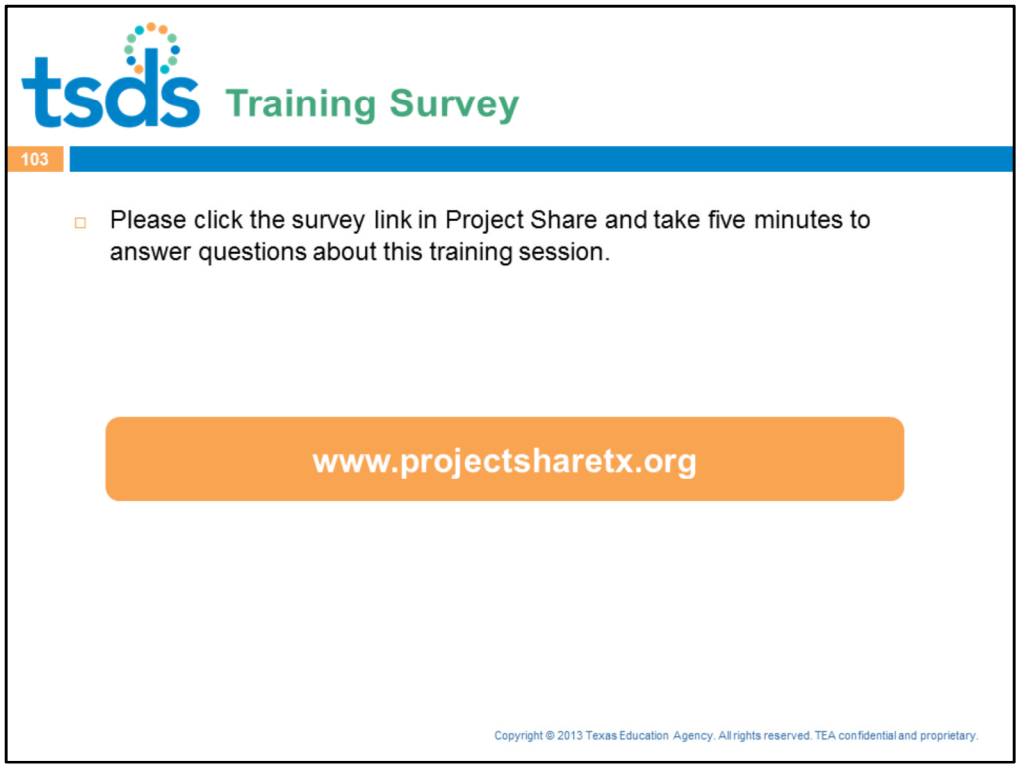
TSDS High Level End User Process Map
Scheduling data promotions from the ODS to the PEIMS Data Mart (PDM)
Verifying that the data promotion has successfully completed
Searching, sorting and downloading the validation errors.
How to Complete Approve and Accept the PEIMS Data Submission

What did you learn?

How does an end user schedule a data promotion to the PDM?
How does an end user search for data validations in the PDM?
Who would need the PEIMS Data Approver role?



Please click the Knowledge Check link in Project Share and take 10 minutes to answer questions about this training session.



Please click the survey link in Project Share and take five minutes to answer questions about this training session.

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Questions?

www.TexasStudentDataSystem.org