tsds texas student data system

Texas Education Agency

TSDS DATA TRANSFER UTILITY

Data Transfer Utility Installation & User Guide

Prepared by State Education Data Systems (SEDS) Team

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Version 2.0

Contents

Installation Guide

Objective

The installation guide provides information and step-by-step instructions for installing the Texas Student Data System (TSDS) Data Transfer Utility (DTU).

Audience

This guide is intended for those performing the installation of the TSDS DTU.

Installation Requirements

The DTU connects to TEA via Secure FTP using a service account managed by the TEA Login (TEAL) security site. You must have a TEAL login to access and install DTU, and you must have a TSDS DTU service account in TEAL to upload data using DTU. See the TEAL Help files for information about TEAL login accounts and service accounts.

The DTU must be installed on the same server as the Local Staging Area (the directory where users place their data extracts for loading to the ODS). The server must be running the Windows Platform operating system.

In addition, the DTU installer will detect Java 1.6 and install it, if needed.

NOTE: There is a known issue with the DTU Installer with Windows Server Data Center addition, which requires that a registry setting must be manually added.

Installation Steps

The following installation steps are required for a successful installation of the TSDS DTU:

- Remove DTU if you have a previous installation.

- Run the installer as administrator.

- Run the DTU from the start menu after the installation is completed.

Removing the Old DTU Installation

If you have a previous TSDS DTU installation and would like a clean installation, perform the following steps to remove the old TSDS DTU installation:

From the Start Menu

1. Click the **Start** menu and find **Escholar > Uninstaller**.

2. Click **Uninstall** to uninstall DTU.

From the Control Panel (Windows 7)

1. Open the Control Panel.

2. Select **Programs and Features.**

3. Click the **eScholar Data Transfer Utility** uninstaller and follow the instructions.

Downloading and Installing DTU

You must have an account on the TEAL system to locate and install DTU.

1. Log in to TEAL and select the **Texas Student Data System Portal** link. This opens the Texas Student Data System (TSDS) applications.

2. Click **Get Started: Manage Data Loads.**

3. The eDM Data Loads page opens:

4. On the top border of the page, click **DTU Package.**

5. Select **Run** or **Save** for the dtu_installer.exe to begin running or downloading the installation. Depending upon your operating system, this may work differently. Just download as you usually would.

6. A security warning may appear saying the publisher could not be verified. Click **Run.**
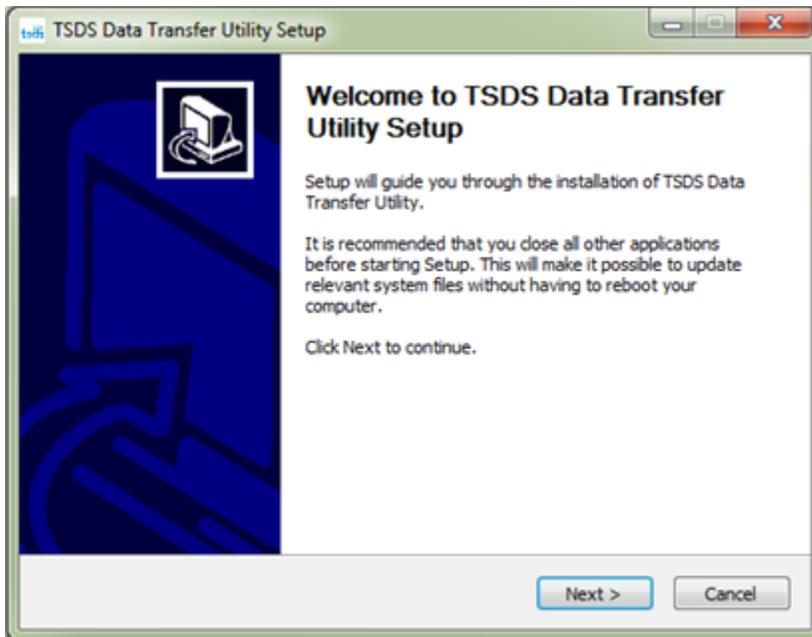
7. Press the **Next** button to continue.

8. Read the License Agreement.
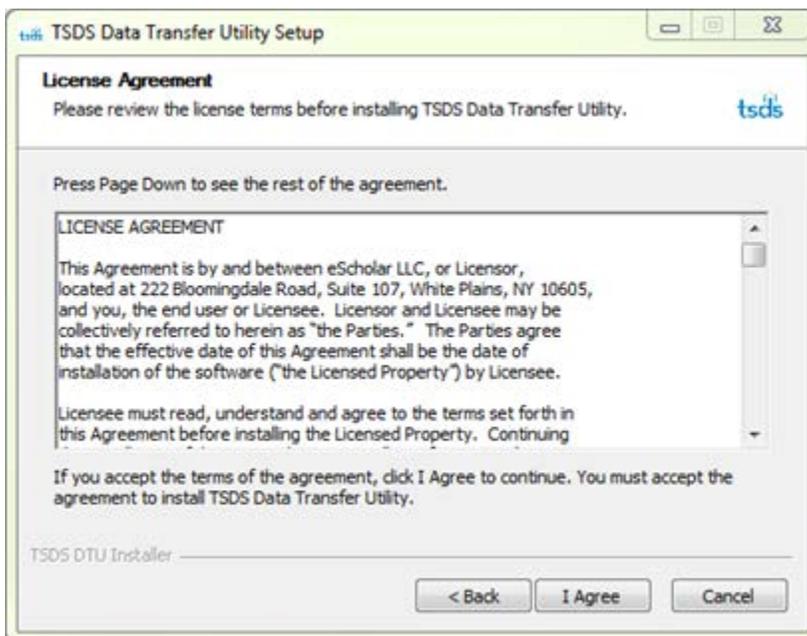
9. Click **I Agree** to continue.

10. If you wish to change the default location, choose the folder where DTU should be installed. Do not use spaces or special characters in the folder name where you will install DTU. In the example, the program will be installed in the **TSDS_DTU** folder under **Program Files.**
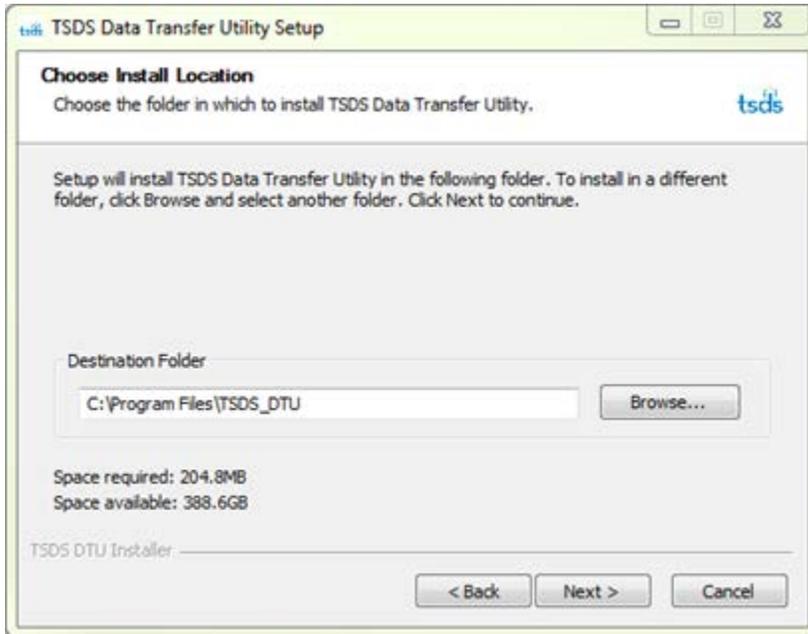
11. Click **Next.**
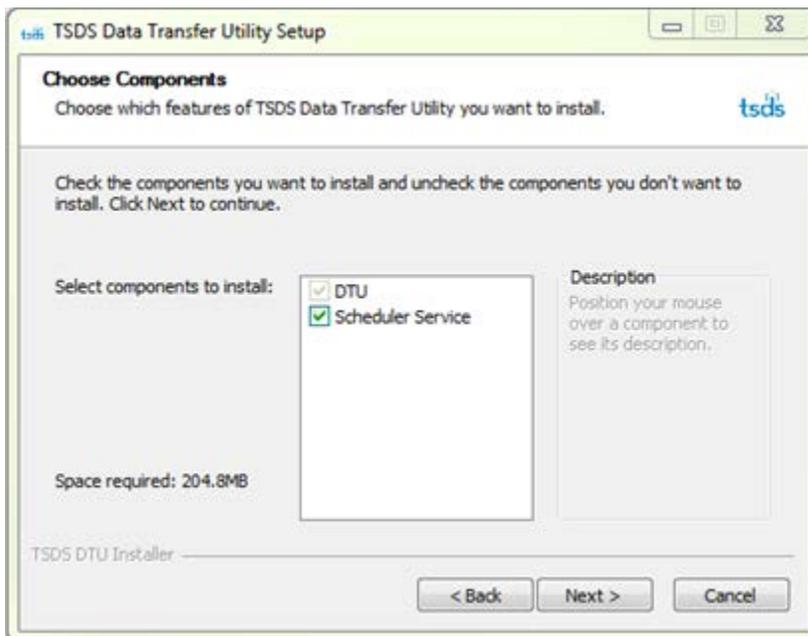
12. Make sure that both components are selected and click **Next.**

13. Click on a Start Menu folder where you want to store the DTU shortcuts.
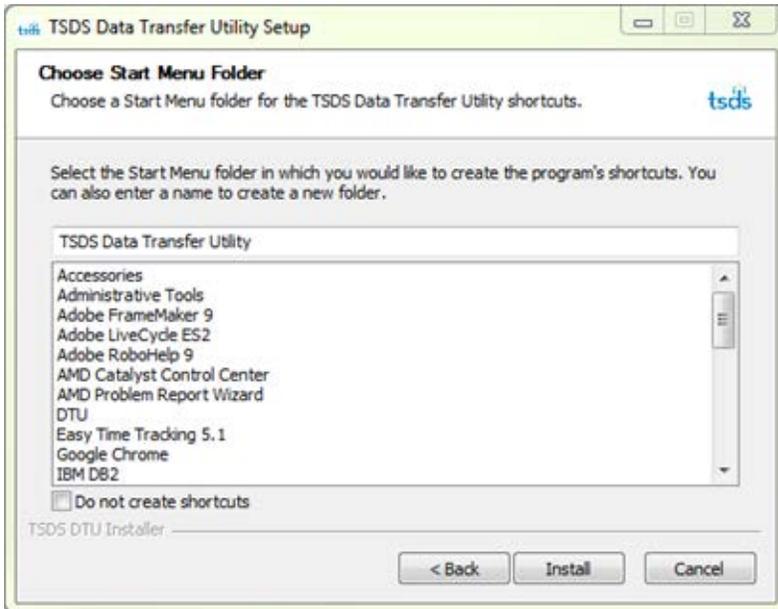
14. Click **Install.** If the installation program cannot find Java 1.6, it will ask to install it. Click **Yes.**

15. The installation begins When the installation setup is completed successfully, the application reports **Installation Complete.** Click **Next** to continue.
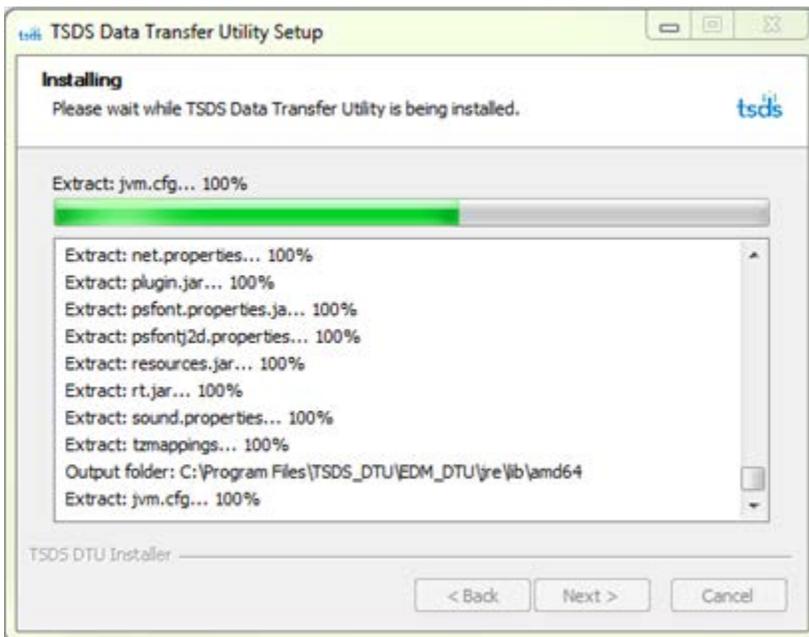
16. Click **Next** once the setup reports the installation was successful.

17. Click **Finish** to close the utility setup program.

User Guide

Audience

This manual is intended for local education agencies (LEAs) and Education Service Centers (ESCs) who wish to securely transfer files to the Texas Student Data System (TSDS) using the Data Transfer Utility (DTU).

Purpose

The objective of this manual is to provide a reference for those functions within the DTU that pertain to transferring interchange files using secure transmission. This manual contains details about application screens, various fields and keywords, and buttons used throughout DTU v 9.0.

What Is the DTU?

The Data Transfer Utility (DTU) is a Secure-FTP-based application that allows users to move zipped data files from their local system to TSDS.

In the picture below, the state-sponsored student information system (SIS) and the other source systems data is uploaded to the LEA's staging area. From there, the DTU transfers the data to the ODS in the Education Data Warehouse (EDW), from which it can be promoted to the data collections, like the Public Education Information Management System (PEIMS), PID Enrollment Tracking (PET), the PEIMS Data-mart, and Dashboard Data-mart.
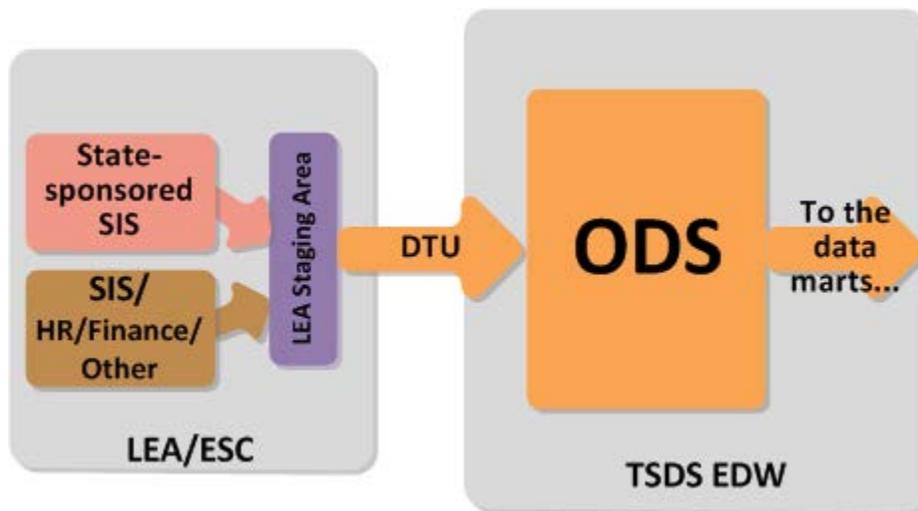
The DTU allows LEAs and ESCs to do the following

- Transfer files through the On Demand tab.

- Transfer files automatically by configuring the Scheduler.

- Monitor the history of the files in the Recent History tab as they are processed both for On Demand and the Scheduler.

- Monitor log details in the log tab both for On Demand and the Scheduler.

> **Important:** See the Configuration tab section for information on how the settings affect what is deleted after a data transfer.

Naming the Data File

All files imported using DTU must be in XML, and they must be named according to the following format:

For each interchange file submitted to the EDW, the system must identify the correct organization and data collection in order to process the file correctly:

Position:	1-6	7	8-10	11	12-20	21	22-33	34	35*
Description:	District Code	_	Campus ID	_	Collection Code	_	Timestamp	_	Interchange

District Code: The LEA code for which the data is being uploaded. (6 digits in length)

Campus ID: The Campus ID if campus data: '000' for district data. (3 digits in length)

Collection Code: The collection code is a character string that uniquely identifies the data collection. (9 characters in length)

- The first four characters of the Collection Code are the ending year of the school year. For example, the first four characters for the 2013–2014 school year would be 2014.

- The next four to five characters of the Collection Code indicate the type of data being submitted. Currently, the possible values are as follows:

Value	Translation in Submission
FALL1	PEIMS Fall First Submission.
FALL2	PEIMS Fall Resubmission.
FALL3	PEIMS Fall Working Collection.

MDYR1	PEIMS Mid-Year First Submission.
MDYR2	PEIMS Mid-Year Resubmission.
MDYR3	PEIMS Mid-Year Working Collection.
SUMR1	PEIMS Summer First Submission.
SUMR2	PEIMS Summer Resubmission.
SUMR3	PEIMS Summer Working Collection.
EXYR1	PEIMS Extended-Year First Submission.
EXYR2	PEIMS Extended-Year Resubmission.
EXYR3	PEIMS Extended-Year Working Collection.
TSDS	TSDS data submissions, including studentGPS™ data

Timestamp: The timestamp is a date in YYYYMMDDHHMM format (e.g. 201406021015). The Timestamp is a system generated value at the time the data is extracted (12 digits in length).

Interchange: The interchange is the name of the interchange being submitted.

There **must** be an underscore (_) between each element in the file name.

Examples:

227950_000_2014FALL1_201310271015_InterchangeStaffAssociationExtension.xml

2013-2014 Fall First Submission Collection Staff Association Interchange for Region XIII

227901_000_2014FALL1_201310271015_InterchangeStudentExtension.xml

2013-2014 Fall First Submission Collection Student Interchange for Austin ISD

227901_002_2014FALL1_201310271015_InterchangeStudentExtension.xml

2013-2014 Fall First Submission Collection Student Interchange for Austin High School in Austin ISD

227950_000_2014FALL2_201310271015_InterchangeStaffAssociationExtension.xml

2013-2014 Fall Resubmission Collection Staff Association Interchange for Region XIII

227950_000_2014FALL3_201310271015_InterchangeStaffAssociationExtension.xml

2013-2014 Fall Working Collection Staff Association Interchange for Region XIII

227901_000_2014TSDS_201308301159_InterchangeStudentExtension.xml

2013-2014 studentGPS™ Dashboard Student Interchange for Austin ISD.

Opening DTU

To run DTU, you must have a DTU service account set up in TEAL. You will log in to the utility using your service account login.

To open DTU, follow these steps:

1. Click on the **Start** menu and select **All Programs > TSDS Data Transfer Utility.**

2. Right click on **DTU** and select **Run as administrator.**

3. If a message appears asking you if you want to allow the program to run, click **Yes.**

4. Log in using your TEAL DTU service account credentials.
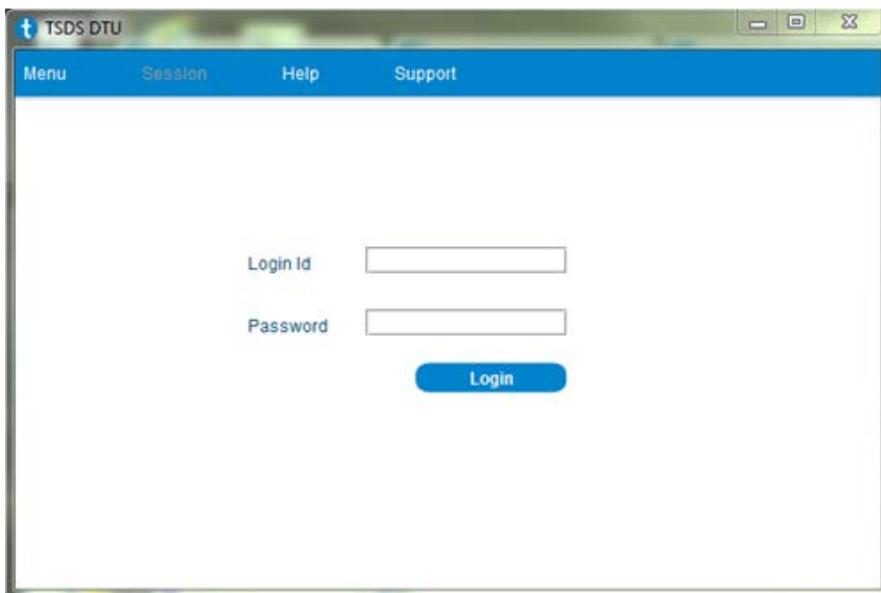
Using the Top Menu

The controls on the top dark blue menu do the following:

- **Menu:** leads to About or exits the program.

- **Session:** exits the session without exiting the program.

- **Help:** opens this user manual.

- **Support:** opens the TEAL Logon page, where you can log in and access the Texas Student Data Systems Incident Management System.

Transferring Data On Demand

When you first log into the DTU, it comes up showing the On Demand page. This page lets you add, remove, and transfer files at will.
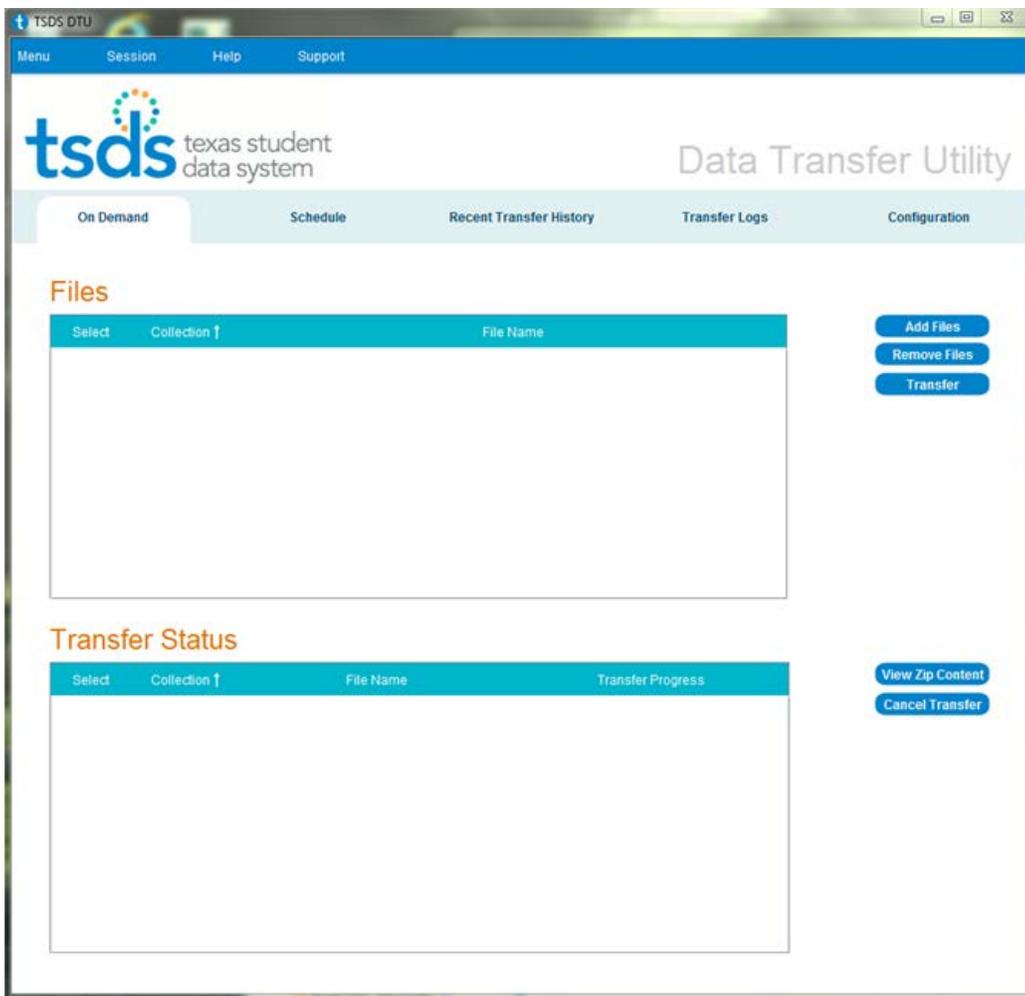
Follow these steps to transfer data on demand.

1. Click **Add Files.**

2. Locate and select the files to be added. You can select one or more files or select a zip file containing multiple files. The selected files are added to the **Files** pane at the top of the dialog box. As you select files, the program does a check of the file name against the standards and issues an error message if there is an error.

To remove files, check the box for file in the **Select** list and click **Remove Files.** If you do not select any files, no files will be removed.

To change the sort order of the files, click on the **Collection** or **File Name** headers to sort.

3. Make sure the files you want to transfer have a check. If you have files in the list that are not selected, click their check boxes to do so. If you have checked files in the list that you don't want to transfer, click the check box again to clear the selection.

4. When you have selected files in the correct format to transfer, click **Transfer**. The DTU creates a zip file from the transfer files and lists it in the **Transfer Status** pane at the bottom of the dialog box.

When the transfer completes successfully, the status of the file is shown as **Done.**

Viewing the Zip File Contents

If you wish to view the zip file in the **Transfer Status** list, click **View Zip Content.**

Cancelling an On Demand Transfer

If a transfer is in progress you can cancel it by clicking the **Cancel Tranfer** button. If the transfer is cancelled successfully, the status is shown as **Cancelled.**

Scheduling Data to Transfer

If you have periodic data to transfer, it may be best to schedule the data transfer instead of doing it on demand. On the Schedule tab, you can do the following:

- Schedule data to be transferred at daily, weekly, or monthly intervals.

- View the scheduled tasks.

- Edit scheduled transfers.

- Delete a scheduled task.

Scheduling a Periodic Data Transfer

Follow these steps to schedule a daily data transfer:

1. When using the option to schedule data transfers, you must first run the Scheduler as an administrator. Click **All Programs > TSDS Data Transfer Utility.** Right-click **Scheduler,** and select **Run as administrator.**

2. Open DTU.

3. Click the **Schedule** tab.

4. Click **Add New Task.** The Add Task dialog box appears:

5. Type a name for the job. Using a name that reflects the data and period may be a good idea.

6. Type the path to the folder where the data is located.

7. Type your ID for your service account.

8. Type your password for your service account.

9. Select the interval between transfers. The dialog box changes depending upon which period you choose.

   - If you select **Daily,** type the start time in hours and minutes. For example, the job in the picture shown above will start at 11:07 AM every day. The program uses a 24-hour clock, so if you wanted the job to start at 11:07 PM, you would enter 23 hours and 7 minutes.

   - If you select **Weekly,** the pane changes as follows. Type the start time as instructed in the previous bullet and then select at least one day of the week for the weekly transfer.
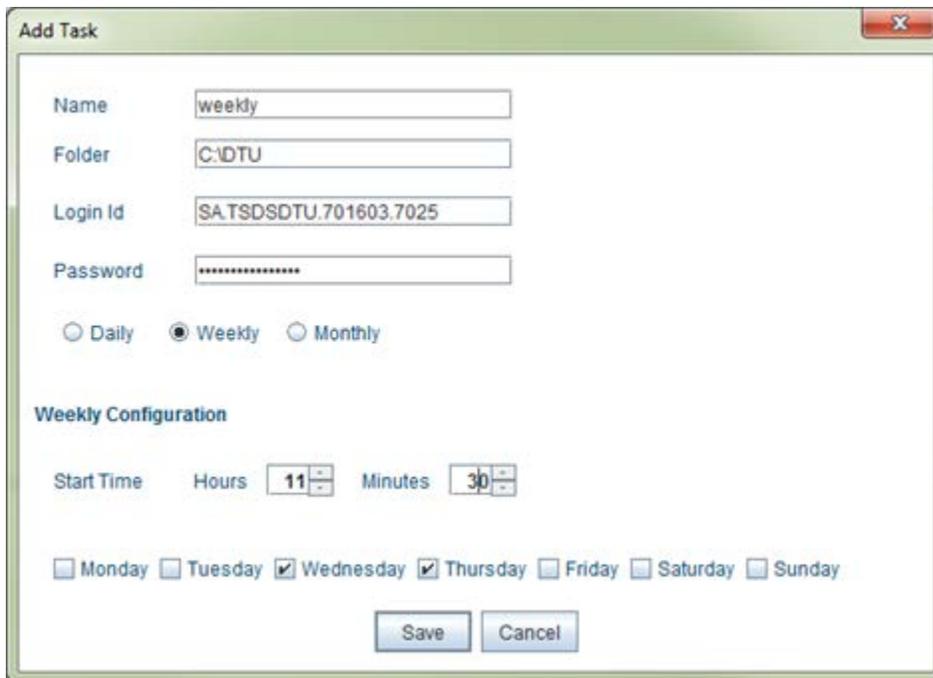
   In the example above, the data will be transferred from the dtu folder on the C drive every Wednesday and Thursday at 11:30 AM.

- If you select **Monthly,** the pane changes as follows. Type the start time as instructed for the Daily instructions and then select make your selections for the week day.
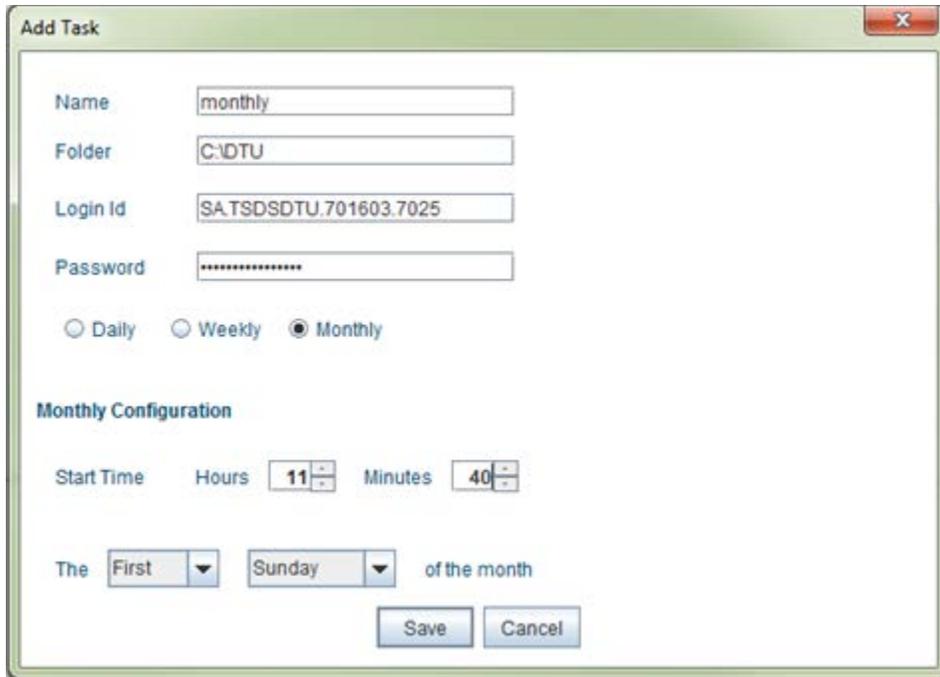
In the example above, data will be transferred from the **dtu** folder on the C drive the first Sunday of every month at 11:40 AM.

8. Click **Save** to save your settings.

Editing a Scheduled Task

Follow these steps to edit a scheduled task. For example, you will need to edit all of your scheduled tasks anytime your service account password is updated (this must be done at least once a year), in order to change your login information.

1. Click on the **Schedule** tab.

2. Next to the task you want to edit, click the **Edit** button.

3. Edit any fields necessary.

4. Click **Save** to save your changes.

Deleting a Scheduled Task

Follow these steps to delete a scheduled task:

1. Click on the **Schedule** tab.

2. Next to the task you want to edit, click the **Edit** button.

3. Click **Delete.**

Viewing Transfer History

You can view the transfer history of the last 50 transfers, whether on demand or scheduled. To do so, click the Recent Transfer History tab:

This tab shows the following information:

- **Collection:** the school year and collection code

- **File Name:** the path and name of the file transferred

- **Start Time:** the start time of the data transfer

- **Time Completed:** the time the transfer completed

- **Status:** the status of the transfer—Completed, Failed, or Cancelled

Although the files are transferred by means of a zip file, the tab shows the status of the individual files within the zip file.

Viewing Log Files

The log files provide information about data transfers for each day. To view the log files, follow these steps:

1. Click the Transfer Logs tab.

2. Choose either **On-Demand** or **Scheduler.**
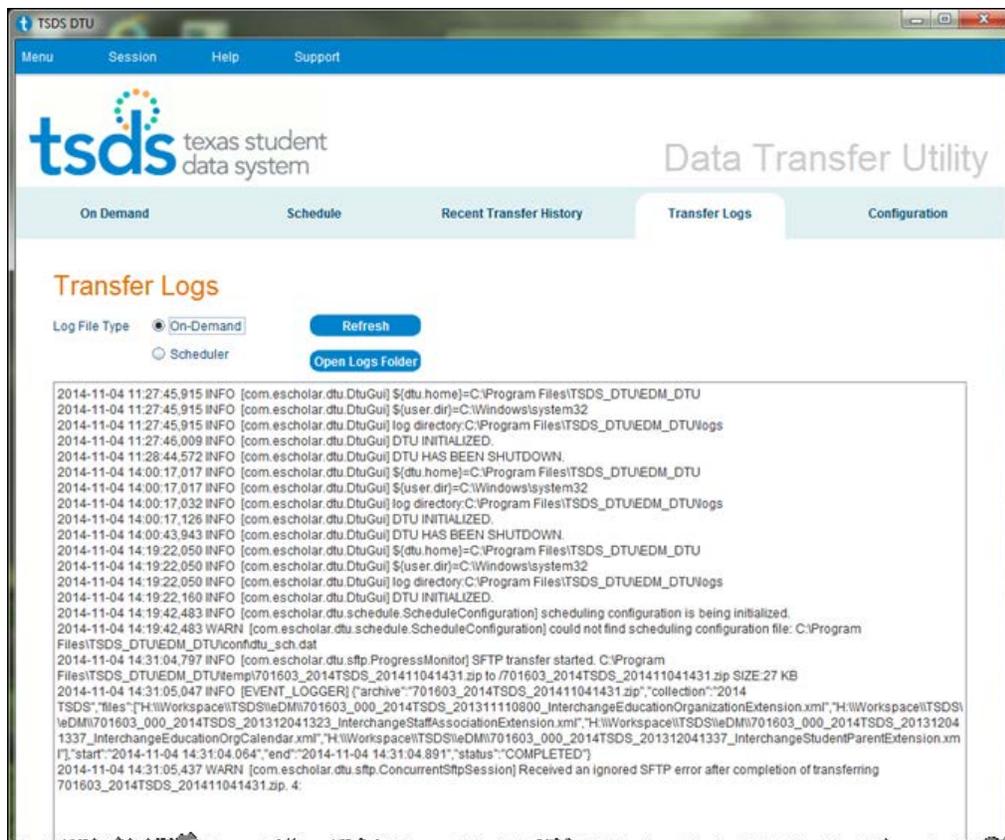
3. Scroll to the end of the file to see the most current data.

4. Click **Refresh** to see the updated file.

Follow these steps to view the log files in Windows Explorer:

1. Click **Open Log File Folder.**

2. Use the dialog box to select the log file.

3. Click Open to open it in Windows Explorer.

Configuring DTU

File Retention

TEA recommends saving all files scheduled for load to TSDS for a minimum of 10 days in case of error.

On-Demand Files

The DTU archives files per collection by creating a zip file in the TMP folder under the DTU installation directory.

In the configuration panel, if the **Purge Archive File** check box is checked, the DTU will delete zip files under the TMP folder after the transfer.

If it is not checked, the DTU will not delete the zip file.

The DTU does not delete the original files selected for an on-demand transfer.

Scheduled Transfers

For scheduled transfers, the DTU creates a zip file per collection under the scheduled task's folder. The DTU deletes the original files and creates an archive folder under the original source folder.

The DTU places the zip files it transfers into the archive folder. These zip files are not deleted by the DTU: the LEA can retain or delete these files as desired.

Configuration

You can change the following on the Configuration tab.

- DTU session timeout

- File purging

- Tracing
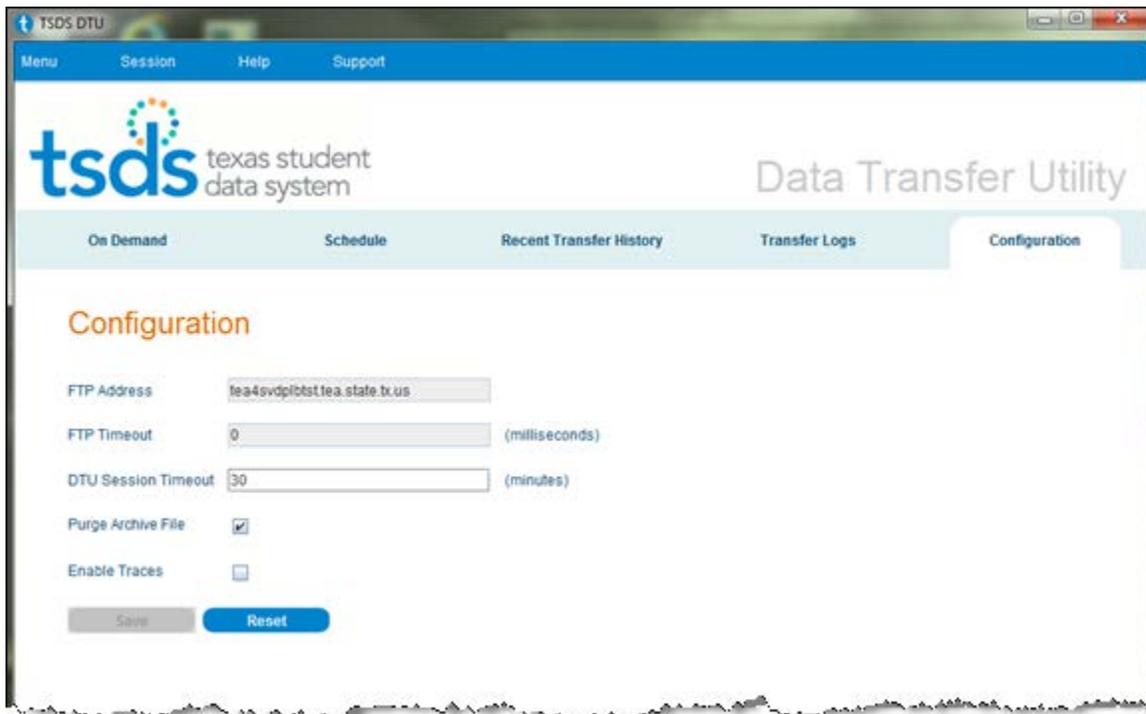
1. Click the Configuration tab.

2. Change the DTU Session Timeout by typing another number in the field.

3. Use **Purge Archive File** to determine whether on demand zip files are deleted after the data transfer. See the File Retention section for more information.

4. Use the **Enable Traces** check box to enable or disable tracing capability.

5. Click **Save** to save your changes or **Reset** to change them back to the original settings.