

Course 7 Dashboard Data Submissions to PIMS

Document #C7.2

Agenda

- Review the start up process for the PDE Educator Dashboard
- Review the Pennsylvania Information Management System (PIMS) data loading process, both manual file uploads and web services
- Explore troubleshooting issues that may occur during the data loading process
- Learn how the nightly data load to the Operational Dashboard Data Store processes
- Overview on how to facilitate data quality checks with district staff
- Investigate the process of provisioning roles and creating cohorts within PIMS

Course Pre-Requisites

Participants must have:

- An account for the Pennsylvania Department of Education (PDE) Portal
- An account for the PDE Educator Dashboard
- An active account for the Standard Aligned System training platform (<http://www.pdesas.org/>)

Participants must have completed:

- Course 3: FERPA for the LEA

Course Learning Objectives

Participants will be able to:

- Implement the PDE Educator Dashboard start up
- Load files to PIMS using manual uploads or web services
- Troubleshoot error and warning files or system level issues that may occur during the data loading process
- Articulate how the Dashboard is populated nightly
- Facilitate Data Quality Check sessions with district personnel
- Provision roles and create cohorts

➤ PDE Educator Dashboard Start Up

➤ PPID Required

- End users are required to have a PPID to access the PDE Educator Dashboard
- Most district teachers and administrators will have a PPID
- District Tech Coordinators may not already have a PPID
- Tech Coordinators will need to request a PPID in order to provision access in the Dashboard as Dashboard Administrator

➤ Requesting a PPID – Step 1

- In order to request a PPID, go to the Teacher Information Management System at:

http://www.portal.state.pa.us/portal/server.pt/community/tims_-_teacher_information_management_system/



➤ Requesting a PPID – Step 2

Teacher Information Management System **TIMS**

[TIMS Home](#) | [Overview](#) | [Learn More](#) | [User Guides](#) | [Help & Support](#) | [Training](#) | [Access TIMS](#)

Access TIMS

You must be logged in to access the Teacher Information Management System (TIMS). Need assistance? Use the links below.


- [Getting Started with TIMS and User Guides](#)
- [How to Obtain Assistance](#) (PDF)

Log In Status:

Access the TIMS application by clicking [here](#)

- Click on the “here” link to access the TIMS application

➤ Request a PPID – Step 3

 **pennsylvania**
DEPARTMENT OF EDUCATION

TIMS

Establish Teacher Information Management System (TIMS) Profile

This one time registration process requires the following information to be provided:

1. If you hold a PA certificate, enter the information that was provided at the time of issuance of your latest PA certificate.
2. If you do not hold a PA certificate, enter your SSN, Date of Birth, and Current Official Name as it appears on legal documents.

* SSN:

* Confirm SSN:

* Date of Birth (MM/DD/YYYY):

* Official First Name:

* Last Name:

Middle Initial:

* Citizenship Status:

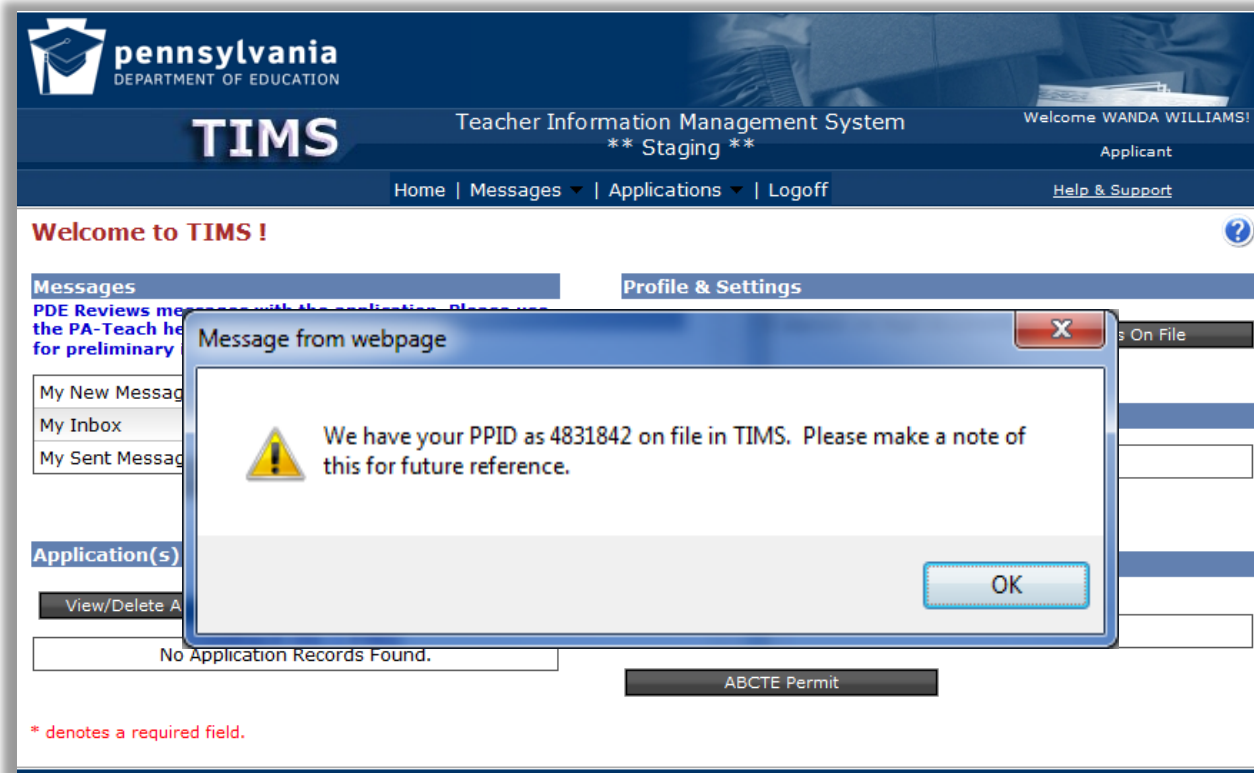
APPLICANTS: Please note the following information (552a note) AUTHORITY: 24 P.S. Section 1224.

REQUIRED BY THE FEDERAL PRIVACY ACT (5 U.S.C. 552a)

US Citizen
Lawful Permanent Resident (Green Card Holder)
Non-Immigrant US Visa Holder
Other

- The TIMS Application will prompt the user to enter their First Name, Last Name, Social Security Number and Date of Birth, and Citizenship Status into the system
- The TIMS application will provide the PPID to the user

➤ Request a PPID – Step 4



- Your PPID is displayed upon completion of the profile
- Write down 7-digit number for future reference

➤ PDE Portal & Dashboard User Authentication

- In addition to the PPID, a “PA Login” account is required for a user to access any PDE Application, including the Dashboard
- A user only needs to register once
 - Once a user is registered he or she can be granted access to any PDE Application by the local LEA security administrator

➤ External User Registration – Step 1

For a new user:

Go to <https://www.login.state.pa.us/login/Register.aspx>

The screenshot shows the 'Register' page of the Pennsylvania State Department of Education's external user registration system. The page has a dark blue header with the 'PA pennsylvania STATE OF INDEPENDENCE' logo. On the left, a yellow sidebar contains links for 'Login', 'Register', and 'Forgot Password'. The main content area is titled 'Register' and includes the instruction 'Fill in the information below to register.' Below this, there is a registration form with the following fields: 'Name Prefix' (dropdown menu), 'First Name' (text box with a red asterisk), 'Last Name' (text box with a red asterisk), 'Name Suffix' (dropdown menu), 'Company' (text box), 'Title' (text box), 'Address1' (text box with a red asterisk), 'Address2' (text box), 'City' (text box with a red asterisk), 'State' (text box with a red asterisk), 'Zip' (text box with a red asterisk), 'Phone' (three text boxes), and 'Fax' (three text boxes). A 'Forgot Password' link is visible at the bottom of the form.

➤ External User Registration – Step 2

- Enter the required information, and make note of the following:
 - User ID
 - Password
 - School District Email Address
 - *Important* Use your school email address to register in the portal
- Click **Register**
- Go to <http://www.education.state.pa.us> and log into the PDE Portal to complete your account registration

➤ External User Registration – Step 3

- Notify your LEAs Dashboard Team or local security administrator that you are ready to be provisioned in the Dashboard Early Warning System and Intervention Catalog

▶ Dashboard Data Submission

Required Templates to power the EWS

The Early Warning System component of the Dashboard is based on students' Attendance, Behavior, and Course Performance. At a minimum, this core data must be provided to power the Dashboard and EWS. The core data and its prerequisites includes 15 templates that can be submitted at varying frequencies.

- **Beginning of Year:** Templates such as Location Marking Period define a school's terms and grading periods and only needs to be submitted once to establish the schedule or if there is a change to the information.
- **As-Needed:** Templates such as School Enrollment and Staff Assignment impact the students enrolled at a school and staff members access to the Dashboard application and should be submitted anytime there is a change to such information.
- **Frequently:** Templates such as Student Daily Attendance or Student Class Grade Detail supply metrics that are critical to the Early Warning System functionality and should be loaded frequently to ensure the school is seeing the maximum benefit of the EWS.

Required templates

Domain	Template	Frequency
Location	Location Marking Period	Beginning of Year
Location	Location MP Calendar Date	Beginning of Year
Attendance	Student Daily Attendance and/or Student Course Attendance	Frequently
Course & Grades Domain	Course	Beginning of Year
Course & Grades Domain	Course Instructor	As-Needed
Course & Grades Domain	Student Class Grade Detail	Frequently
Course & Grades Domain	Student Course Enrollment	As-Needed
Discipline Domain	Incident Offender	Frequently
Discipline Domain	Incident Offender Infraction	Frequently
Discipline Domain	Incident Template	Frequently
Discipline Domain	Person Template	As-Needed
Enrollment Domain	School Enrollment	Frequently
Staff	Staff Assignment	As-Needed
Staff	Staff Snapshot	As-Needed
Student	Student Snapshot	As-Needed

Optional templates

Domain	Template	Template Requirement	Note
Academic Record Domain	Student Course Transcript	Optional	
Academic Record Domain	Student Credit GPA	Conditionally Required	Required if Student Course Transcript is submitted
Assessment Domain	Academic Standards	Conditionally Required	Required if Assessment ItemR Academic Standards is submitted
Assessment Domain	Academic Standards Document	Conditionally Required	Required if Assessment ItemR Academic Standards is submitted
Assessment Domain	Assessment ItemR Academic Standards	Optional	
Assessment Domain	Student Local Assessment Objective	Optional	
Assessment Domain	Student Local Assessment Question	Optional	

Optional templates

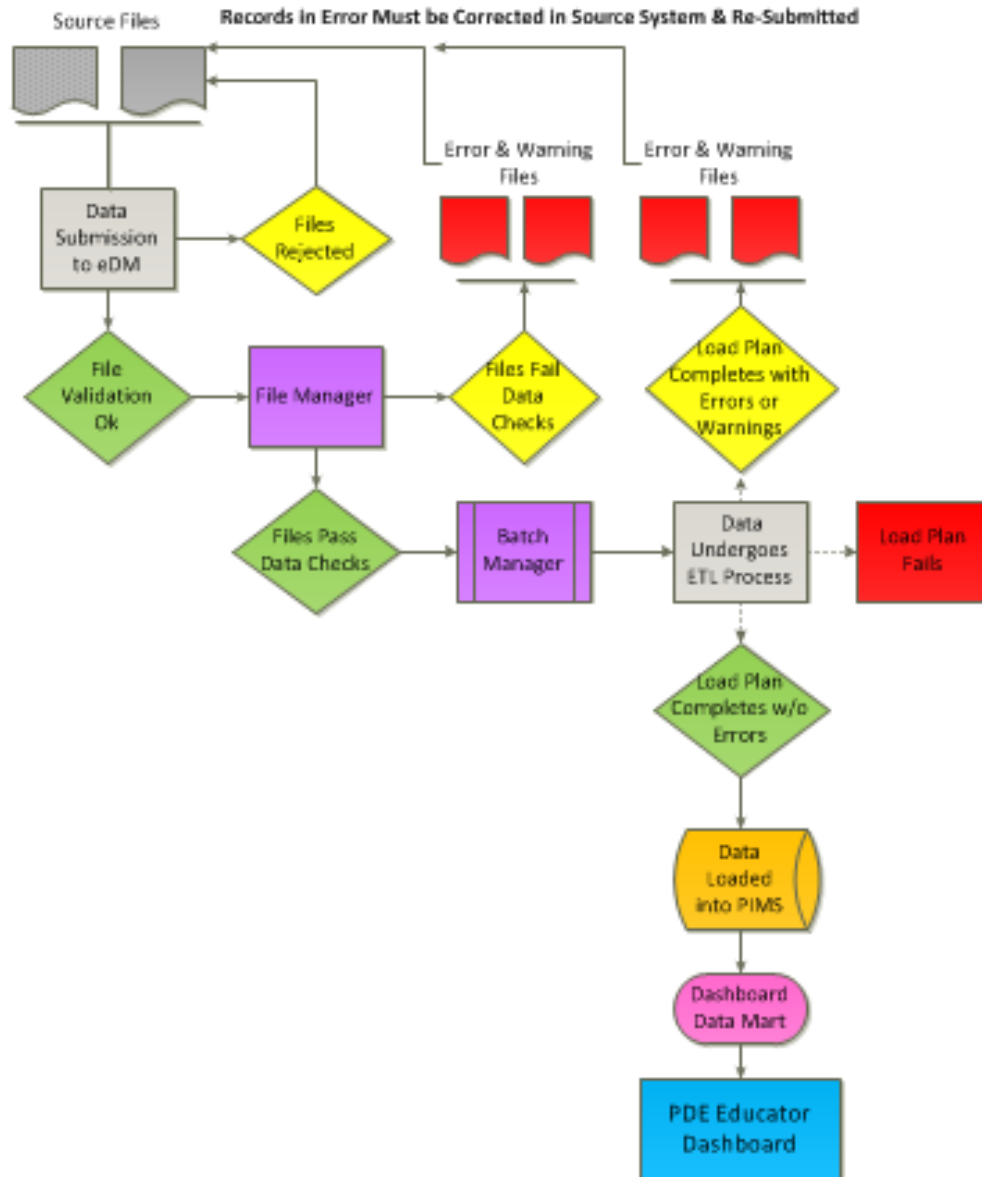
Domain	Template	Template Requirement	Note
Attendance	Staff Attendance	Optional	
Discipline	Incident Offender Disciplinary Action	Optional	
Groups & Programs Domain	Cohort Group	Conditionally Required	Required if Student Cohort Group Fact is submitted
Groups & Programs Domain	Staff Assigned Cohort Group	Conditionally Required	Required if Student Cohort Group Fact is submitted
Groups & Programs Domain	Student Cohort Group Fact	Optional	
Groups & Programs Domain	Programs Fact	Optional	
Student	Contact	Conditionally Required	Required if Student Contact Fact is submitted
Student	Student Contact Fact	Optional	
Student	Student Academic Plan	Optional	

▶ Life Cycle of a File in PIMS

➤ Dashboard vs. PIMS Collections Workflow

- The Data Quality Engine is enabled for PIMS collections, but not for Dashboard collections
- The Dashboard collections are not processed through the Compound Data Quality checks in File Manager or the Advanced Data Quality checks through the Data Quality Engine
- To that end, the work flow between the two collection types differs

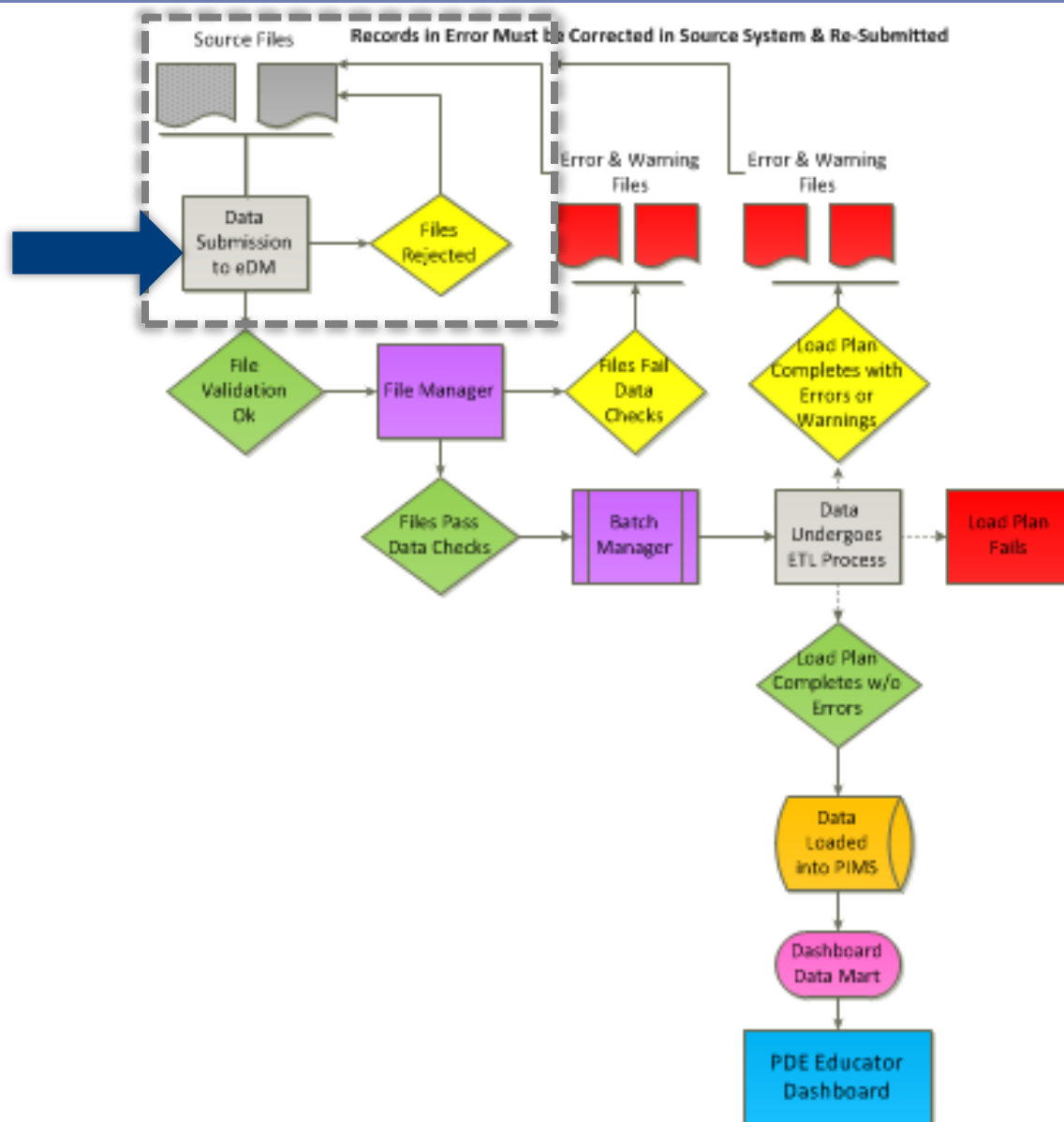
Overview of the Life Cycle of a File in PIMS



Life Cycle of a File in PIMS: Dashboard Collection

- Download document #C7.4 to view the full scale work flow

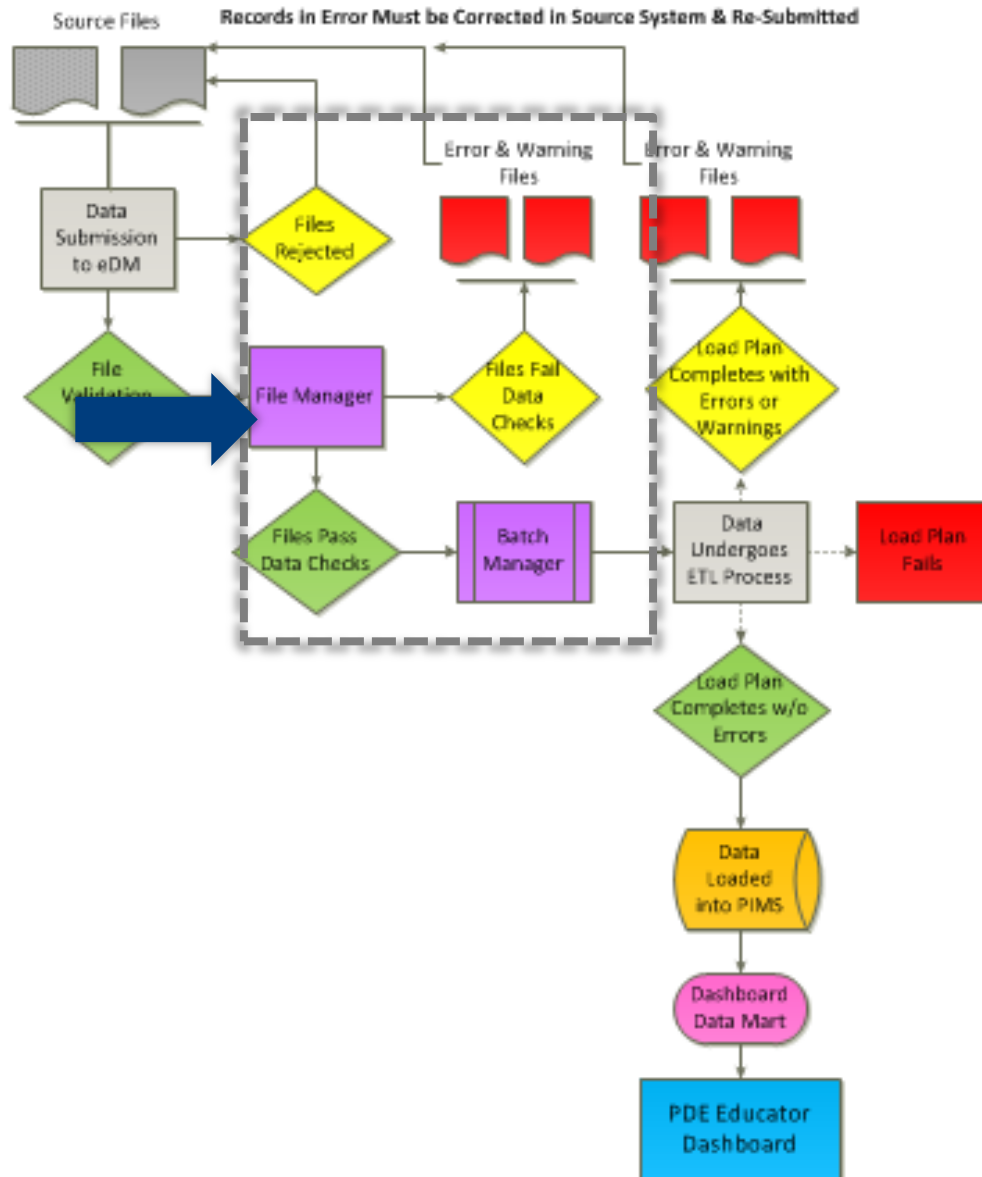
Life Cycle of a File:Data Submission



Life Cycle of a File in PIMS: Dashboard Collection

1. Data Submission:
 - a) Naming convention?
 - b) File type?

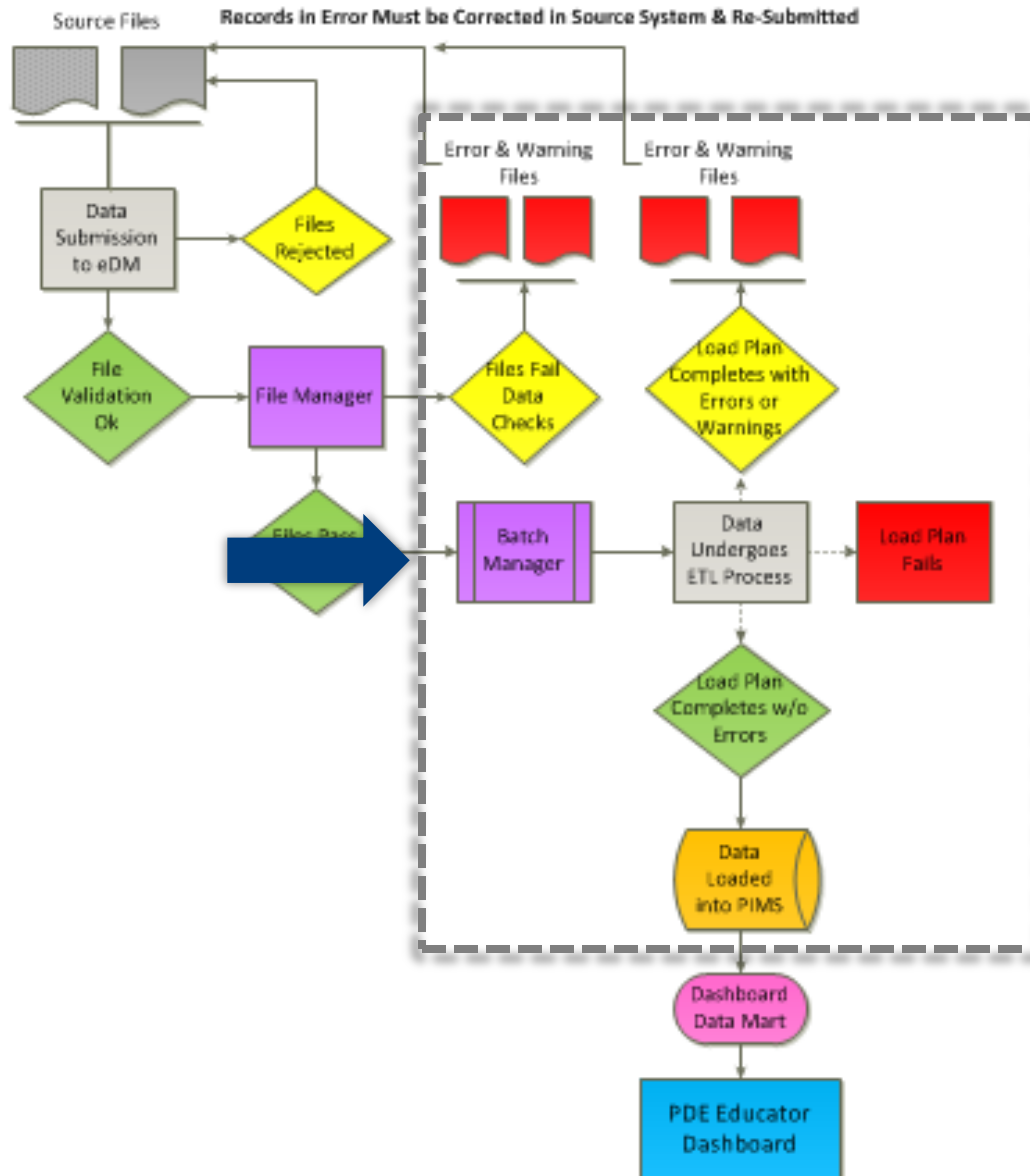
Life Cycle of a File:File Manager



Life Cycle of a File in PIMS: Dashboard Collection

2. File Manager:
a) File level validations?

Life Cycle of a File:ETL

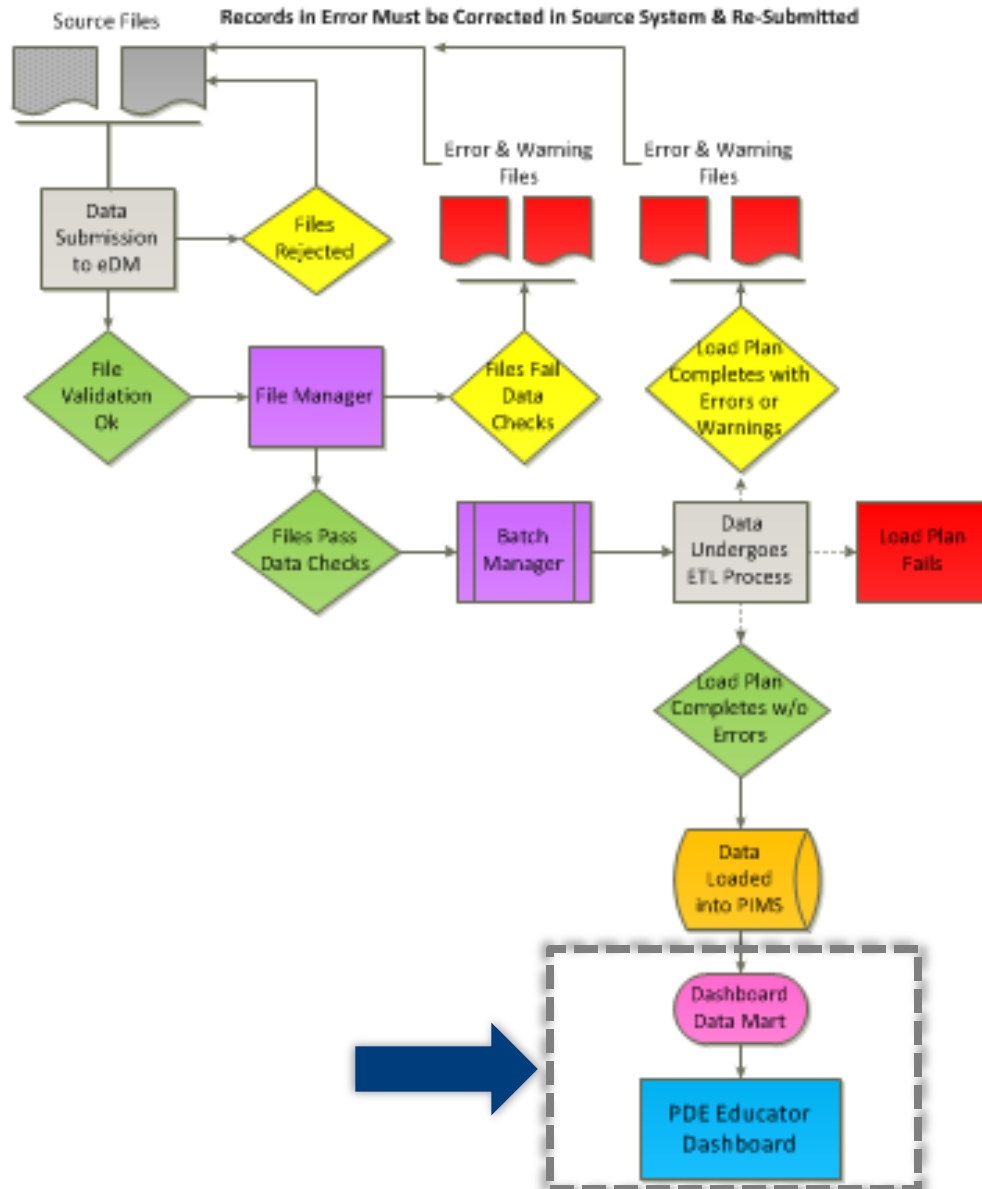


Life Cycle of a File in PIMS: Dashboard Collection

3. Batch Manager – ETL plan:

- a) Load plan completes w/o errors?
- b) Load plan generates error & warning files?
- c) Load plan fails?

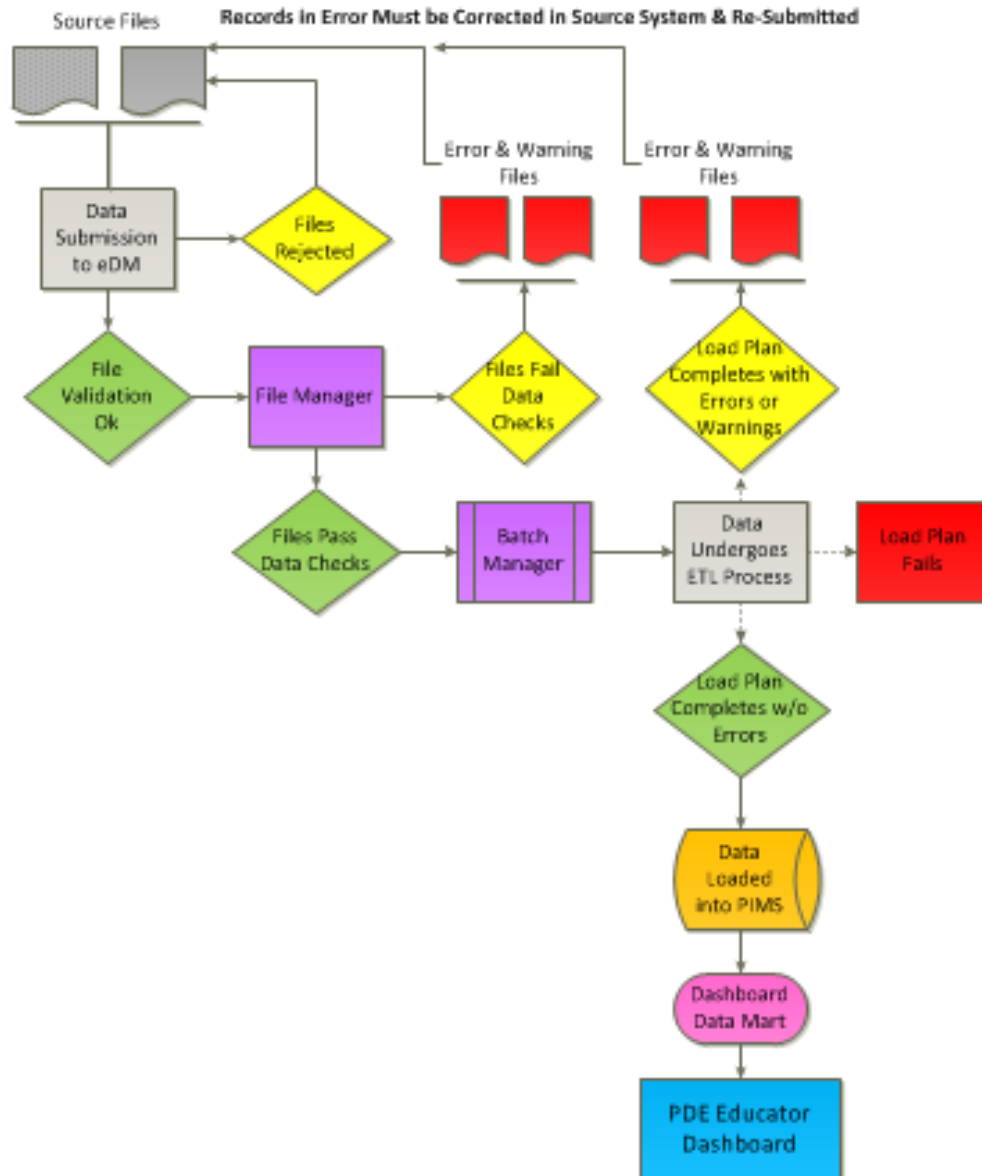
Life Cycle of a File: Dashboard Data Mart



Life Cycle of a File in PIMS: Dashboard Collection

4. Nightly extract to the Dashboard Data Mart
6. PDE Educator Dashboard populated
 - a) Extract routine runs successfully?
 - b) Data is accurate?

▶ Life Cycle of a File: Teach Back Activity

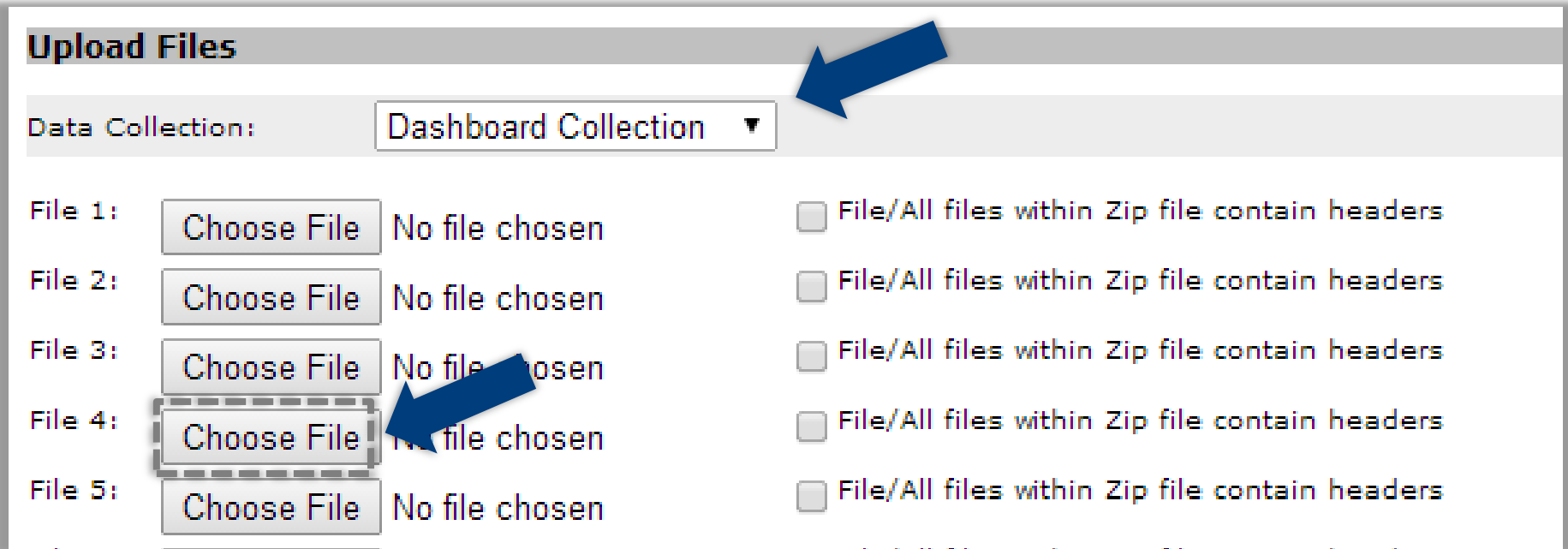


Life Cycle of a File in PIMS: Dashboard Collection

- Can you describe the workflow?
- Turn to a neighbor and take turns describing the workflow, step by step.

➤ Manually Uploading Files into PIMS

Uploading Files



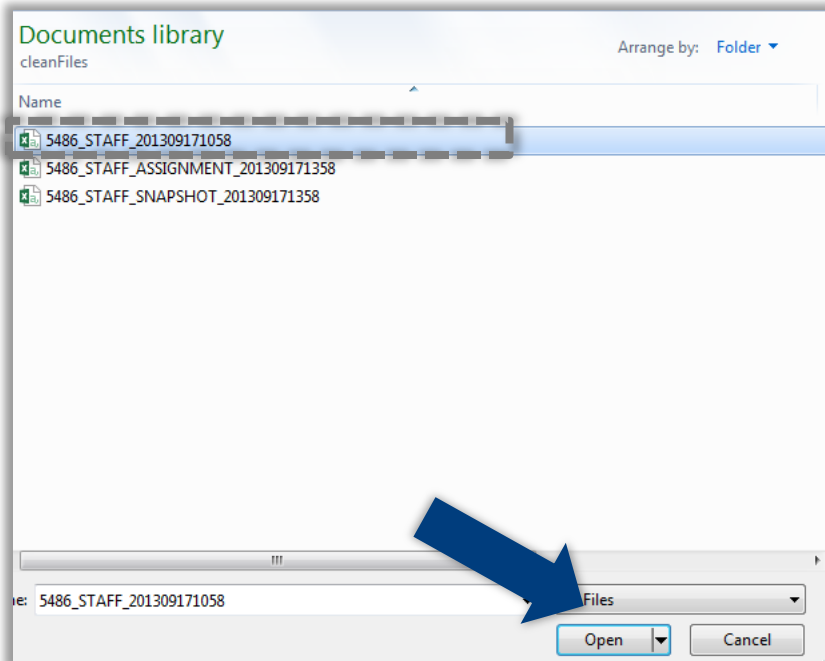
Upload Files

Data Collection: Dashboard Collection ▼

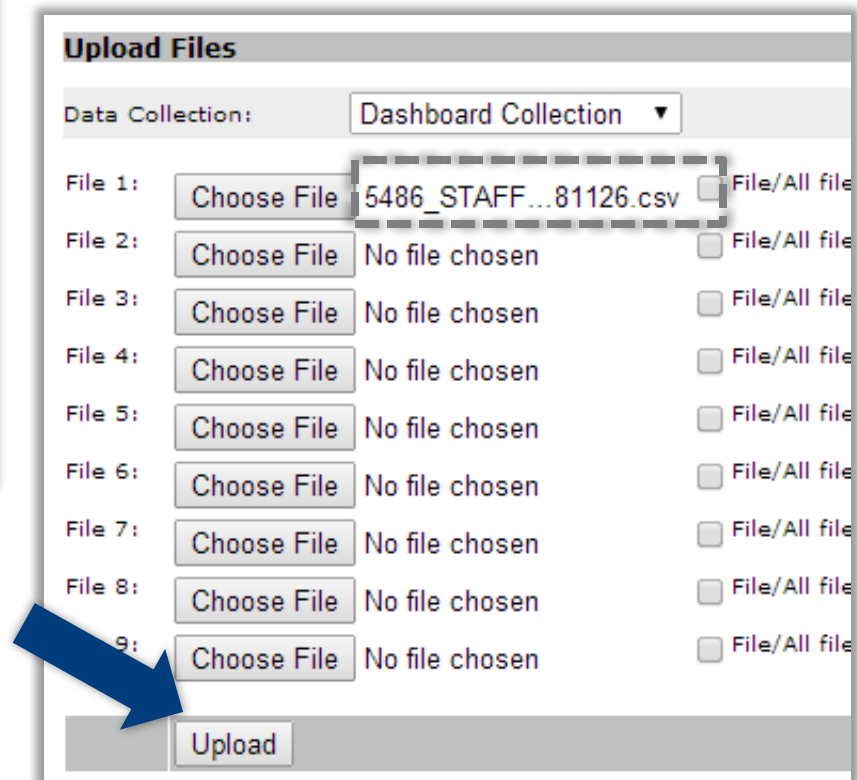
File 1:	Choose File	No file chosen	<input type="checkbox"/> File/All files within Zip file contain headers
File 2:	Choose File	No file chosen	<input type="checkbox"/> File/All files within Zip file contain headers
File 3:	Choose File	No file chosen	<input type="checkbox"/> File/All files within Zip file contain headers
File 4:	Choose File	No file chosen	<input type="checkbox"/> File/All files within Zip file contain headers
File 5:	Choose File	No file chosen	<input type="checkbox"/> File/All files within Zip file contain headers

- Users need to select a collection
- Users then need to browse to the target files using Choose File

File Selection



1) Browse to target file(s)
and select Open



2) Once file is selected, click
Upload

a) Note that the user
has to indicate if the
files contain headers

eDM File Reject Messages

An error has occurred.
You will need to upload all selected files again.

System Message
IMPORTANT: Files must be placed in a batch in order to have their data loaded into the system. Files must be placed in a batch in order to have their data loaded into the system.

Upload Files

Data Collection: Summer Collection ▼

File 1: Choose File No file chosen ☐ File/All files within Zip file contain headers

*Error - roll over with mouse to view.

File 2: 5486_STAFF_201301181112.csv: File already exists in system within Zip file contain headers

File 3: Choose File No file chosen ☐ File/All files within Zip file contain headers

File 4: Choose File No file chosen ☐ File/All files within Zip file contain headers

eDM requires unique file names for each data submission.

eDM requires files to be in the required format:
<district code>_<table name>_<timestamp>
(YYYYMMDDHHMM).format

An error has occurred.
You will need to upload all selected files again.

System Message
IMPORTANT: Files must be placed in a batch in order to have their data loaded into the system. Files must be placed in a batch in order to have their data loaded into the system.

Upload Files

Data Collection: Summer Collection ▼

File 1: Choose File No file chosen ☐ File/All files within Zip file contain headers

*Error - roll over with mouse to view.

File 2: 5486_STAFF_20130118111245.csv: Invalid file name. File names should be of the form <full district code>_<table name>_<timestamp in YYYYMMDDHHMM format>.<type>, Invalid Timestamp within Zip file contain headers

File 3: within Zip file contain headers

File 4: Choose File No file chosen ☐ File/All files within Zip file contain headers

Discussion Point

What is the correct name for a Student file for your district, using the current date and time for the timestamp?

➤ Web Services

▶ Submitting Data using Web Services

- Web services allow LEA users to submit data to PDE on a regularly scheduled basis, without the requirement of manually uploading files
- The LEA would work with the local source system vendor to initially set up the web services
- Web services can be called to transfer data at whatever frequency the LEA requires to submit data to the PDE Educator Dashboard

➤ Setting Up Web Services

- LEAs need to work with their source system vendors and PDE to set up web services
- The following slides provide the required information the source system vendors need in order to set up web services
 - The LEAs do not access these screens or set the configurations – they only need to provide guidance to the source system vendors
- LEAs will also need to request a service account from PDE

Service Accounts

- User – this is an eDM User account.
- PDE will setup a Service Account for each LEA
 - There will be one Service Account per district
 - The call will need to pass in the Service Account credentials
 - This Service Account will be noted as the account who uploaded the data in the eDM web interface

➤ URL End Point for PIMS Staging

In order to call the web service LEA needs to go to the URL end point for web services in PIMS Staging:

<https://www.pims.beta.state.pa.us/EDM/ws/upload/file>

▶ Web Services Required Information

Field	Description	Valid Value
District	AUN number in PIMS	-
School Year	School Year for the Collection	2014
Collection Code	This is the collection code for the collection.	For example: PADASHSTAGING
Application Code	Agency	K12 (K-12) or PS (Post Secondary)

➤ Web Services Required Information (cont'd)

Field	Description	Valid Value
Include Headers	This indicator is for all the files contained in the zip file. All templates will either include or exclude headers	Y or N
File	This is a zip containing one or more eScholar Templates. The templates must have the eScholar naming convention. The templates must be part of the data collection.	For example – having a zip file called dataupload.zip and inside that zip file having templates named like: 101260303_STUD_ATTEND _DAY_201312030835.csv

Web Services Screen Shot

EDM File Upload Webservice Test

URL:	<input type="text" value="https://www.pims.beta.state.pa.us/EDM/ws/upload/file"/>
User:	<input type="text" value="5486ServiceAccount"/>
Password:	<input type="password" value="....."/>
District:	<input type="text" value="5486"/>
School Year:	<input type="text" value="2014"/>
Collection Code:	<input type="text" value="SPRING2014"/>
Application Code:	<input checked="" type="radio"/> K12 <input type="radio"/> PS
Includes Header:	<input type="checkbox"/>
File:	<input type="button" value="Choose File"/> 5486_PROGR...211111.zip
<input type="button" value="Upload"/>	

- This is a sample screen shot of JSP Page calling the web services
- Note the required fields described in the previous slide

Web Services Response Code

```
▼<edm-response>  
  <status code="200" description="Successful"/>  
</edm-response>
```

- Once the web services have been set up, eDM will send a response code
- In this case, the test was successful

➤ Confirming Data Load from Web Services

- The LEA will see any web service batches in eDM
 - If the files pass file validation they will be found in Batch Manager
 - If the files fail file validation, the files will be located in File Manager
 - Either event will trigger a system-generated notification

➤ Web Services Notifications

- For each service account (per LEA) an email address or email address group can be configured to receive notifications
- The following notifications can be generated:
 - Files uploaded but failed validation
 - Batch was completed
 - Batch failed

Batch Completed Notification Sample



Tue 6/10/2014 3:18 PM

email@yourcompany.com

eScholar Data Manager - Your automated batch ID:568 has completed processing.

To John Pozzuto

Batch Id: 568

PLAN: 1-Load SCHOLWHS.PROGRAMS_FACT

TABLE STATISTICS

Load Statistic	Count
Records Inserted-PROGRAMS_FACT	10
Records Inserted-REASONS_FACT	0
Rows Updated-PROGRAMS_FACT	0
Rows Deleted-Delete Utility	0

ERROR FILES

File Name	Records
ERROR_SOURCEFILE_MSG_20140610.LOG	0

- This is a sample Batch Completed notification
- Batch Completed notifications show the load statistics

Discussion Point

What are the benefits of using web services?

Is your district going to leverage web services?

➤ File Manager

➤ What happens in File Manager?

- File Manager executes file level validations
- These are “pre-ETL” validations

➤ File Level Validations

- File validations check that the data adheres to the PIMS business rules, like:
 - Key fields are populated
 - Valid values are used
 - Values fall within specified ranges
 - Numeric fields are populated with numbers
 - Required fields are populated
 - Restricted fields do not have a value entered

Files: Processing

Uploaded Files

Search

Add to BatchDelete

File Status:AllFrom:03/23/2014To:06/21/2014Filter





	File ID	Collection	File Name	Uploaded	Status	Actions
<input type="checkbox"/>	5043	Dashboard Collection	5486_STAFF_201301171055.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5042	Dashboard Collection	5486_STAFF_ASSIGNMENT_201301171355.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5041	Dashboard Collection	5486_STAFF_201301181127.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5040	Dashboard Collection	5486_STAFF_SNAPSHOT_201301171355.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5035	Summer Collection	5486_STAFF_201301171054.CSV	2014-06-16 10:47		

Displaying 1 to 5 of 26

FirstPrevNextLast

- Once the file is received by eDM, the application assigns the file a unique File ID
- We can also see that the file status is Processing

File Manager Status Icons

Icon	Title	Definition
	File Processing	eDM is running file through validations
	File Rejected	File had an invalid file name
	Validation OK	File completed validations without errors
	Validation Failed	File failed validation

Passed File Validation

Uploaded Files

Search

Add to BatchDelete

File Status:AllFrom:03/23/2014To:06/21/2014Filter

	File ID	Collection	File Name	Uploaded Time	Status	Actions
<input type="checkbox"/>	5043	Dashboard Collection	5486_STAFF_201301171055.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5042	Dashboard Collection	5486_STAFF_ASSIGNMENT_201301171355.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5041	Dashboard Collection	5486_STAFF_201301181127.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5040	Dashboard Collection	5486_STAFF_SNAPSHOT_201301171355.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5035	Summer Collection	5486_STAFF_201301171054.CSV	2014-06-16 10:47		

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FirstPrevNextLast

- If the files pass file validation, then the status will be returned with a green check mark
- These files can be batched and sent along to Batch Manager

Failed File Validation

Uploaded Files

Search

Add to BatchDelete

File Status:AllFrom:03/23/2014To:06/21/2014Filter

	File ID	Collection	File Name	Uploaded Time	Status	Actions
<input type="checkbox"/>	5043	Dashboard Collection	5486_STAFF_201301171055.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5042	Dashboard Collection	5486_STAFF_ASSIGNMENT_201301171355.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5041	Dashboard Collection	5486_STAFF_201301181127.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5040	Dashboard Collection	5486_STAFF_SNAPSHOT_201301171355.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5035	Summer Collection	5486_STAFF_201301171054.CSV	2014-06-16 10:47		

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FirstPrevNextLast

- If a file fails validation, the file status will be returned with a red X
- Users need to drill down on the magnifying glass icon to review the error files

File Manager Errors

Source Record Number	DISTRICT CODE	LOCATION CODE	SCHOOL YEAR DATE	STUDENT ID	SOCIAL SECURITY NUMBER
8	605	1000	2011/06/30	7194	
20	605	1000	2011-6-30	4490	

OBSOLETE	HOMEROOM	BIRTH DATE	GENDER CODE	ADDRESS 1	ADDRESS 2	CITY
	HR401	2005-12-27	M			
	HR104	2002-02-28	F			
	HR301	2000-12-31	Failed Range			
	HR401	1999-06-22	F			
	HR301	2000-08-30	M			

- Errors are itemized by source row number in the file preview pane
- Each error is highlighted in red
- Note that when the user tool tips over the highlighted field, the error message pops up

➤ Systemic Data Quality

In the cases that the data does not pass file validation, corrections should be made in the *source system* and uploaded to eDM again

▶ Uploading Corrected Files

[Uploaded Files](#) [Search](#)

Add to Batch Delete

File Status: All From: 03/23/2014 To: 06/21/2014 Filter

<input type="checkbox"/>	File ID	Collection	File Name	Uploaded Time	Status	Actions
<input type="checkbox"/>	5043	Dashboard Collection	5486_STAFF_201301171055.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5042	Dashboard Collection	5486_STAFF_ASSIGNMENT_201301171355.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5041	Dashboard Collection	5486_STAFF_201301181127.CSV	2014-06-21 09:40		
<input type="checkbox"/>		Dashboard Collection	5486_STAFF_SNAPSHOT_201301171355.CSV	2014-06-21 09:40		
<input checked="" type="checkbox"/>	5035	Summer Collection	5486_STAFF_201301171054.CSV	2014-06-16 10:47		

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First Prev Next Last

- If one of the files fails, delete that single file in File Manager
- Upload the corrected files

▶ Batching Files

Uploaded Files Search

Add to Batch Delete

File Status: All From: 03/23/2014 To: 06/21/2014 Filter

<input type="checkbox"/>	File ID	File Name	Uploaded Time	Status	Actions
<input checked="" type="checkbox"/>	5043	Dashboard Collection 5486_STAFF_201301171055.CSV	2014-06-21 09:40	✓	
<input checked="" type="checkbox"/>	5042	Dashboard Collection 5486_STAFF_ASSIGNMENT_201301171355.CSV	2014-06-21 09:40	✓	
<input checked="" type="checkbox"/>	5041	Dashboard Collection 5486_STAFF_201301181127.CSV	2014-06-21 09:40	✓	
<input type="checkbox"/>	5040	Dashboard Collection 5486_STAFF_SNAPSHOT_201301171355.CSV	2014-06-21 09:40	✓	
<input type="checkbox"/>	5035	Summer Collection 5486_STAFF_201301171054.CSV	2014-06-16 10:47	✗	

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First Prev Next Last

- Select the file or files that are ready to be batched
- Only files that have passed validation can be batched

View Batch

File Manager

[Uploaded Files](#) [Search](#)

File Status: From: To:

<input type="checkbox"/>	File ID	Collection	File Name	Uploaded Time	Status	Actions
<input checked="" type="checkbox"/>	5043	Dashboard Collection	5486_STAFF_201301171055.CSV	2014-06-21 09:40		
<input checked="" type="checkbox"/>	5042	Dashboard Collection	5486_STAFF_ASSIGNMENT_201301171355.CSV	2014-06-21 09:40		
<input checked="" type="checkbox"/>	5041	Dashboard Collection	5486_STAFF_201301181127.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5040	Dashboard Collection	5486_STAFF_SNAPSHOT_201301171355.CSV	2014-06-21 09:40		
<input type="checkbox"/>	5035	Summer Collection	5486_STAFF_201301171054.CSV	2014-06-16 10:47		

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- Once the files are selected, click View Batch

View Batch Details

View Batch

Add optional comments below or
To create a batch with the 3 file(s) in the cart,
press the 'Process Batch' button below:













Process Batch

Cancel

Add comments associated with this batch (limited to 255 characters)

Training

Please review the list of files below before creating a batch:

<input type="checkbox"/>	File ID	Template	Collection	File Name	Uploaded Time	Status**	Actions
<input type="checkbox"/>	5041	STAFF	Dashboard Collection	5486_STAFF_201301181127.CSV	2014-06-21 09:40	Validation OK	   
<input type="checkbox"/>	5042	STAFF ASSIGNMENT	Dashboard Collection	5486_STAFF_ASSIGNMENT_201301171355.CSV	2014-06-21 09:40	Validation OK	   
<input type="checkbox"/>	5043	STAFF	Dashboard Collection	5486_STAFF_201301171055.CSV	2014-06-21 09:40	Validation OK	   

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First Prev Next Last

Remove From Batch

Cancel

To create a batch with the 3 file(s) in the cart, press the 'Process Batch' button below:

Process Batch

- On the next screen enter any administrative notes that will help organize and identify batches
- Review the files selected
- Then click process batch

➤ Automated Batching

- Note that if you are using web services to submit data to PIMS, files are automatically batched and sent to Batch Manager if the files pass file validation
- If the files fail validation in File Manager, then a notification will be sent to the user

Discussion Point

What types of data validation occur in File Manager?

▶ Batch Manager

➤ Batch Manager: ETL Validations

- The Batch Manager kicks off the ETL process
 - ETL stands for Extract, Transform and Load
 - This loads new records to PIMS or updates existing records
 - The ETL process also runs referential data checks
 - These validations check for referential integrity against other tables

Batch Status

Batch Manager

Batches

Search

Hide from list **

Date From:

03/18/2014

Date To:

06/16/2014

Batch Status:





All

Filter

<input type="checkbox"/>	Batch ID	Batch Type	Comments	Created Time	Batch Status	Data Status	Actions
<input type="checkbox"/>	566	Data Load	Training	2014-06-16 10:05	Processing		
<input type="checkbox"/>	565	Data Load	Training	2014-06-16 09:59	Complete		
<input type="checkbox"/>	564	Data Load	Training	2014-05-27 14:18	Complete		
<input type="checkbox"/>	563	Data Load	demo	2014-05-13 10:50	DQE Complete		
<input type="checkbox"/>	562	Data Load	demo	2014-05-13 10:46	Complete		
<input type="checkbox"/>	561	Data Load	demo	2014-05-13 10:44	Complete		
<input type="checkbox"/>	560	Data Load	test	2014-05-07 17:03	DQE Complete		
<input type="checkbox"/>	559	Data Load	admin	2014-05-07 12:14	Complete		
<input type="checkbox"/>	558	Data Load	demo_Staff_Snap_Assign	2014-04-23 13:18	Complete		
<input type="checkbox"/>	557	Data Load	demo_Student_Snap	2014-04-23 13:04	Complete		

- Once the batches are received by Batch Manager the Batch Status is returned as Processing or Complete
- If other batches for PIMS collections are processing, users may note additional statuses

▶ Batch Status & Data Status Definitions

Icon	Batch Status	Data Status
	Processing	Processing
	Complete	The load plan has completed and error files were generated
	Complete	The load plan has completed and there were no errors
	Load plan failed	The load plan failed to complete

▶ Load Plan Complete Without Errors

Batches				Search			
Hide from list **				Date From: 03/01/2013	Date To: 06/16/2014	Batch Status: All	Filter
<input type="checkbox"/>	Batch ID	Batch Type	Comments	Modified Time	Batch Status	Data Status	Actions
<input type="checkbox"/>	335	Data Load	Load Staff	2013-06-29 09:59	Complete		
<input type="checkbox"/>	334	Data Load	Load Staff	2013-06-29 09:48	Complete		
<input type="checkbox"/>	333	Data Load	Load Staff	2013-06-29 09:41	Complete		
<input type="checkbox"/>	332	Data Load	Process Staff Assignment	2013-06-28 22:33	Complete		
<input type="checkbox"/>	329	Data Load	Load Staff Assignment	2013-06-17 21:15	Complete		
<input type="checkbox"/>	328	Data Load	Load Staff Assignment	2013-06-17 16:12	Complete		
<input type="checkbox"/>	327	Data Load	Load Staff Assignment	2013-06-17 16:09	Complete		
<input type="checkbox"/>	294	Data Load	Load Batch	2013-03-11 13:05	Complete		
<input type="checkbox"/>	293	Data Load	Load 2010 Batch	2013-03-11 12:25	Complete		
<input type="checkbox"/>	292	Data Load	Load Student	2013-03-11 11:48	Complete		

- If the load plan complete without errors, the all records have been inserted into PIMS
- Drill down on the magnifying glass to review the results of the ETL process

View Batch Details – No Errors

Batch Details

Batch ID: 327 

Auto Batched: No

Last Modified: 2013-06-17

Data Collection: Dashboard Collection

Batch Status: Complete

Data Status: 

Comments: Load Staff Assignment [Edit Comments](#)

Batch Files

	File ID	File Name	Uploaded Time	Data Status	Actions
<input type="checkbox"/>	4419	5486_STAFF_ASSIGN_CODE_201111211100.CSV	2013-06-17		

Displaying 1 to 1 of 1

First Prev Next Last

- On the next screen the user reviews the batch details
- To verify the results of the ETL process, drill down on the magnifying glass icon

Verify ETL Results

General Information **Validation Information** **ETL Information**

Status: Plan Complete

ETL Plan Start: 2013-06-17 16:09

ETL Plan End: 2013-06-17 16:09

File Statistics

Rows Source No Change : 128

Total Records Rejected : 0

Table Statistics

Records Inserted - STAFF_ASSIGN_CODE : 0

Rows Updated - STAFF_ASSIGN_CODE : 0

ETL Generated Files

File	Records	Last Modified Date	View File Content
ERROR_SOURCEFILE_MSG_20130617.LOG	0	2013-06-17 16:09	
Load_SCHOLWHS.STAFF_ASSIGN_CODE_LP.log	3	2013-06-17 16:09	
Load_SCHOLWHS.STAFF_ASSIGN_CODE_LP_PARAMS.txt	25	2013-06-17 16:09	

- The file and table statistics are returned
 - In this case, 128 records were submitted to PIMS, but the data already existed
 - No new records were inserted and no records were updated

▶ Load Plan Complete With Errors

Batch Manager

[Batches](#) [Search](#)

Hide from list ** Date From: 03/18/2014 Date To: 06/16/2014 Batch Status: All Filter

<input type="checkbox"/>	Batch ID	Batch Type	Comments	Modified Time	Batch Status	Data Status	Actions
<input type="checkbox"/>	567	Data Load		2014-06-16 10:11	Processing		
<input type="checkbox"/>	566	Data Load	Training	2014-06-16 10:05	Complete		
<input type="checkbox"/>	565	Data Load	Training	2014-06-16 09:59	Complete		
<input type="checkbox"/>	564	Data Load	Training	2014-05-27 14:18	Complete		
<input type="checkbox"/>	563	Data Load	demo	2014-05-13 10:50	DQE Complete		
<input type="checkbox"/>	562	Data Load	demo	2014-05-13 10:46	Complete		
<input type="checkbox"/>	561	Data Load	demo	2014-05-13 10:44	Complete		
<input type="checkbox"/>	560	Data Load	test	2014-05-07 17:03	DQE Complete		

- If the load plan completes with errors, error files were generated by the ETL process
- Records that didn't generate an error file were inserted into PIMS
- Drill down on the magnifying glass to review the error files

View Batch Details - Errors

Batch Details


Batch ID: 566

Auto Batched: No

Last Modified: 2014-06-16

Data Collection: Dashboard Collection

Batch Status: Complete





Data Status: 

Comments:

Training

Edit Comments

Batch Files

	File ID	File Name	Uploaded Time	Data Status	Actions
<input type="checkbox"/>	5017	5486_STAFF_SNAPSHOT_201309171357.CSV	2014-05-27		
<input type="checkbox"/>	5016	5486_STAFF_ASSIGNMENT_201309171357.CSV	2014-05-27		

Displaying 1 to 2 of 2

First

Prev

Next


Last

- Users can review batch details on this screen
- Drill down on the magnifying glass to review the error files generated by the ETL process

▶ Accessing Error Files

[General Information](#)[Validation Information](#)[ETL Information](#)

Status:

Plan Complete with Errors 

ETL Plan Start:

2014-06-16 10:05

ETL Plan End:

2014-06-16 10:05

File Statistics

Rows Source No Change :

0

Total Records Rejected :

25





Table Statistics

Records Inserted - STAFF_SNAPSHOT :

0

Rows Updated - STAFF_SNAPSHOT :

ETL Generated Files

File	Records	Last Modified Date	View File Content
ERROR_BAD_DATES_20140616.TAB	25	2014-06-16 10:05	
ERROR_SOURCEFILE_MSG_20140616.LOG	0	2014-06-16 10:05	
Load_SCHOLWHS.STAFF_SNAPSHOT_LP.log	3	2014-06-16 10:05	
Load_SCHOLWHS.STAFF_SNAPSHOT_LP_PARAMS.txt	83	2014-06-16 10:05	

Cancel

- Under ETL Generated Files we can see the error files
- There is a record count for each error type

➤ Interpreting Error Files

ETL Generated Files	
File	Records
ERROR_BAD_DATES_20140513.TAB	1
ERROR_KL_REASONS_CODE_20140513.TAB	1
ERROR_KL_STUDENT_20140513.TAB	1
ERROR_SOURCEFILE_MSG_20140513.LOG	0
Load_SCHOLWHS.SPECIAL_ED_SNAP_LP.log	3
Load_SCHOLWHS.SPECIAL_ED_SNAP_LP_PARAMS.txt	79

- The error file says what type of error was generated
 - The first error file flagged dates that didn't meet the parameters of the load plan
 - The next file flagged an issue with the logical key in the data submission to the Reasons_Code table
 - The last file also found a logical key issue, but with the data submission to the Student table
- The error files are also generated with a date stamp

ETL Error: File Preview

File Preview

Note: For performance reasons, only the first 100 rows of a file is displayed. To view the entire contents of larger files, you must download the file.

Source Record Number	Bad Dates Error Count	(K) District Code	(K) School Year Date	(K) Special Ed Snapshot Date	(K) Student ID	State District Code	School Year Limit	Period Level	Last IEP Date	Last Evaluation Date	Annual Review Date	Triennial Review Date	Special Ed Entry Date	Special Ed Exit Date	Student Snapshot Date	Special Ed Snapshot Date School Year	Min Date	School Year Date Not ISO	School Year Date Not in Period Table	School Year Date Not Same as School Year Limit
1	1	5486	2012-06-30	2012-10-01	1181353629	2427	2011-06-30	Day							2012-10-01	2013-06-30	1900-01-01	-	-	X

- The file preview pane allows the user to view the first 100 records in error
- Each error references the source record number
- The Bad Dates Error Count notes how many errors are contained in the single record
- The column marked with the "X" denotes what is the actual error

➤ Systemic Data Quality

In the cases that the data does not pass validation, corrections should be made in the *source system* and uploaded to eDM again

Cloning Files

Batch Details

Batch ID: 578

Auto Batched: No

Last Modified: 2014-08-18

Data Collection: Dashboard Collection

Batch Status: Complete

Data Status:

Comments [Edit Comments](#)

Batch Files

	File ID	File Name	Uploaded Time	Data Status	Actions
<input type="checkbox"/>	5064	5486_STAFF_201301171005.CSV	2014-08-18		
<input type="checkbox"/>	5066	5486_STAFF_SNAPSHOT_201301171305.CSV	2014-08-18		
<input type="checkbox"/>	5065	5486_STAFF_ASSIGNMENT_201301171305.CSV	2014-08-18		

Displaying 1 to 3 of 3

[Clone Selected Files in Batch](#) [Cancel](#)

- If a Batch fails, but one or more files passed validation, users can elect to clone the file(s)
- Cloned files are recreated and sent directly to File Manager, where the files are then processed again

Discussion Point

What types of validations are executed during the ETL process?

➤ Troubleshooting Data Issues in File Manager

Valid Values

LOCATION CODE	SCHOOL YEAR DATE	STUDENT ID	SOCIAL SECURITY NUMBER	FAMILY NUMBER	LAST NAME SHORT	FIRST NAME SHORT	MIDDLE INITIAL	CURRENT GRADE LEVEL
1000	2009-06-30							003
1000	2009-06-30							XXX
1000	2009-06-30							XXX
1000	2009-06-30							XXX
1000	2009-06-30							PKP

- The value XXX is not defined as a valid value for Current Grade Level in the Master Lookup

➤ Mandatory Fields

Source Record Number	DISTRICT CODE	LOCATION CODE	SCHOOL YEAR DATE	STUDENT ID	SOCIAL SECURITY NUMBER	FAMILY NUMBER
28	605	1000	2011-06-30			
382	605	1000	2011-06-30			
999	605	1000	2011-06-30			

- The Student ID is a mandatory field and therefore a value is required

➤ School Year Date - Collection

Source Record Number	DISTRICT CODE	LOCATION CODE	SCHOOL YEAR DATE	STUDENT ID	SOCIAL SECURITY NUMBER
8	605	1000	2011/06/30		
20	605	1000	2011-6-30		

- The School Year Date is not named for this Collection

Snapshot Date

POINTS ADD- ON	SNAPSHOT DATE	OBSOLETE	OBSOLETE
	2011-10-01		
	2011-10-01		
	-10-01		
	2011-10-01		
	2011-10-01		
	2011-10-01		
	2011-10-01		
	2011-10-01		
	2011-10-01		
	2011-10-01		
	2011-10-01		
	2011-10-01		
	2011-10-01		
	2011-10-01		
	2011-10-01		
	2011-10-01		
	2011-10-01		
	2010/10/01		
	2011-10-01		
	2011-10-01		

III

Failed Snapshot Date

- The Snapshot Date doesn't align to the Collection Snapshot Date

Field Length & No Value Allowed

Source Record Number	DISTRICT CODE	LOCATION CODE	SCHOOL YEAR DATE	STUDENT ID	SOCIAL SECURITY NUMBER	FAMILY NUMBER	LAST NAME SHORT	FIRST NAME SHORT
1	DISTRICT CODE	LOCATION CODE	SCHOOL YEAR DATE	STUDENT ID	SOCIAL SECURITY NUMBER	FAMILY NUMBER	LAST NAME SHORT	FIRST NAME SHORT
2	5486	3288	2011-06-30	5	999-99-9999			
3	5486	3288	2011-06-30	4				
4	5486	3288	2011-06-30	4				
6	5486	3288	2011-06-30	7				
7	5486	3288	2011-06-30	7				

- In this case, the user didn't check the "File has a Header" box at upload
- The application is reading the header row as data and the fields are failing Field Length Validation
- The SSN field is also marked as No Value Allowed, so any value entered would trigger an error message

➤ Range Validation

OBSOLETE	HOMEROOM	BIRTH DATE	GENDER CODE	ADDRESS 1	ADDRESS 2	CITY
	HR401	2005-12-27	M			
	HR104	2002-02-28	F			
	HR301	2000-12-31	Failed Range			
	HR401	1999-06-22	F			
	HR301	2000-08-30	M			

- This birth date failed the Range Validation
- The Range Validation sets minimum and maximum values

▶ Batch Manager (ETL) Errors & Data Verification

ETL Generated Files

ETL Generated Files

File	Records
ERROR_BAD_DATES_20140513.TAB	1
ERROR_KL_REASONS_CODE_20140513.TAB	1
ERROR_KL_STUDENT_20140513.TAB	1

Error logs contain reference to source records that were rejected:
TargetTable_ERROR_XXXX

Record Level Errors

X	The error described by the column header was present for that record
-	The error described by the column header was <i>not</i> present

Source Record Number	Bad Dates Error Count	(K) District Code	(K) School Year Date	(K) Location Code	(K*) Course Code	(K) Semester	(K*) Course Code Long	State District Code	School Year Date Not ISO	School Year Date Not in Period Table	School Year Date Not Equal to Limit
9	1	MNRDIST1	2008-06-30	MNLOC6	CCODE8	S8	CCLONG8		-	X	-



ERROR_KL_Location

Filename: ERROR_KL_LOCATION

Action: Download File



File Preview

Note: For performance reasons, only the first 150 rows of a file is displayed. To view the entire contents of larger files, you must download the file.

Source Record Number	Location Code Error Count	(K) District Code	(K) Location Code	(K) School Year Date	(K) Student ID	(K) Enrollment Date	(K) Enrollment Code	State District Code	Location Code Not In Location Table
5	1	601	2000	2009-06-30	6650898252	2008-09-03	W1	111	X
12	1	601	2001	2009-06-30	4058336765	2008-09-03	W1	111	X
13	1	601	2001	2009-06-30	8181289099	2008-09-03	E1	111	X

- The location code referenced by these records doesn't exist in the Location Table



ERROR_KL_DISTRICT

Filename: ERROR_KL_DISTRICT

Action: Download File



File Preview



Note: For performance reasons, only the first 100 rows of a file is displayed. To view the entire contents of larger files, you must c

Source Record Number	District Error Count	(K) District Code	(K) Period End Date	(K) Period Level	(K) Marking Period Number	State District Code	District Code Not in District Table
8	1	608	2011-06-30	2010-2011	2		X
9	1	609	2011-06-30	2010-2011	2		X

- The District Code referenced by these records doesn't exist in the District Table



➤ Error_PERIOD

Filename: ERROR_PERIOD
Action: Download File  

File Preview

Note: For performance reasons, only the first 100 rows of a file is displayed. To view the entire contents of larger files, you must download the file.

Source Record Number	Period Error Count	(K) District Code	(K) Period End Date	(K) Period Level	(K) Marking Period Number	Period Start Date	Period Start Date in Period Table	State District Code	School Year Date	Alt Lookup Desc	Period Level Type in Master Lookup	Period Level Type in Period	Period Level Not in Master Lookup Table	Marking Period Number in Period Table for District Code and School Year Date	Period Level Type Not Same in Master Lookup and Period Table
1	1	601	2011-06-30	2010-2011	2	2010-09-01			2011-06-30	MARKING PERIOD			X	-	-
2	1	602	2011-06-30	2010-2011	2	2010-09-01			2011-06-30	MARKING PERIOD			X	-	-
3	1	603	2011-06-30	2010-2011	2	2010-09-01			2011-06-30	MARKING PERIOD			X	-	-

- The Period Level referenced in these records is not a valid value for Period Level in the Master Lookup Table

ERROR_KL_Staff

Source Record Number	Staff ID Error Count	(K) District Code	(K) Staff ID	(K) Assignment Code	(K) Location Code	(K) School Year Date	(K) Assignment Date	Controlling District Code	Staff ID Not in Staff Table
5	1	MNRDIST1	STF1	MACODE3	MNLOC6	2007-06-30	2007-06-30	ABCDEFGHIJKLMNOPQRST	X
6	1	MNRDIST1	STF1	MACODE3	MNLOC6	2007-06-30	2007-06-30	ABCDEFGHIJKLMNOPQRST	X

- The Staff ID referenced in these records does not exist in the Staff Table




ERROR_BAD_DATES

Error files of this type contain records where one or more date values were:

- Invalid
- Not in ISO format (YYYY-MM-DD)
- Not in the Period table
- Not in compliance with business rules
 - As stated on the Template document
 - As specified via parameter
 - Examples:
 - LIMIT_SCHOOL_YEAR
 - LIMIT_MIN_DATE
 - LIMIT_STUD_BIRTHDATE_MIN
 - LIMIT_STUD_BIRTHDATE_MAX

ERROR_BAD_DATES: Invalid Format

Filename: ERROR_BAD_DATES
Action: Download File 

File Preview

Note: For performance reasons, only the first 150 rows of a file is displayed. To view the entire contents of larger files, you must download the file.

Source Record Number	Bad Dates Error Count	(K) District Code	(K) School Year Date	(K) Location Code	(K*) Course Code	(K) Semester	(K*) Course Code Long	State District Code	School Year Date Not ISO	School Year Date Not in Period Table	School Year Date Not Equal to Limit
2	1	601	06-30-2010	0101	K	9		111	X	-	-

- The date field is in an invalid format
- It must be in: (YYYY_MM_DD)



ERROR_BAD_DATES: Period Table

School Year Date Not ISO	School Year Date Not Equal to Limit	School Year Date Not in Period Table	Birth Date Not ISO	Birth Date Out of Range	Last Status Date Not ISO or Less Than Min Date	Class Rank Date Not ISO or Less Than Min Date	Grade 09 Entry Date Not ISO or Less Than Min Date	District Entry Date Not ISO or Less Than Min Date	School Entry Date Not ISO or Less Than Min Date	Inoculation Date Not ISO	Inoculation Date Less Than Birth Date
-	-	X	-	-	-	-	-	-	-	-	-
-	-	X	-	-	-	-	-	-	-	-	-

- The School Year referenced does not exist in the Period Table

ERROR_VALID_VALUES

Filename: ERROR_VALID_VALUES

Action: Download File  

File Preview


Note: For performance reasons, only the first 100 rows of a file is displayed. To view the entire contents of larger files, you must download the file.

Unimmunization Code Found in Master Lookup Table	Health Insurance Status Code	Health Insurance Status Code Not Found in Master Lookup Table	Multiple Birth Indicator	Multiple Birth Indicator Not Found in Master Lookup Table	Unaccompanied Youth Indicator	Unaccompanied Youth Indicator Not Found in Master Lookup Table	Lookup Code H For Hispanic Multiracial Not Found in Master Lookup Table	Lookup Code M For Hispanic Multiracial Not Found in Master Lookup Table	Last Grade Level	Last Grade Level Not Found in Master Lookup Table	Initial Grade in District	Initial Grade in District Not Found in Master Lookup Table	Next Grade Level	Next Grade Level Not Found in Master Lookup Table
		-		-		-	X	X		-		-		-
		-		-		-	X	X		-		-		-

- The records were rejected because of validation violations
- These lookup codes do not exist on the Master Lookup Table

ERROR_KL_MASTERLOOKUP_DEF

Filename: ERROR_KL_MASTER_LOOKUP_DEF

Action: Download File 

File Preview

Note: For performance reasons, only the first 150 rows of a file is displayed. To view the entire contents of larger files, you must download the file.

Source Record Number	Lookup Name Error Count	(K) District Code	(K) School Year Date	(K) Lookup Name	(K) Lookup Code	Lookup Name Not in Master Lookup Def Table	Lookup Name is e Reserved
952	1	111	2010-06-30	PRIMARY LANGUAGE CODE	9999	X	-
951	1	111	2010-06-30	PRIMARY LANGUAGE CODE	5011	X	-
950	1	111	2010-06-30	PRIMARY LANGUAGE CODE	5010	X	-
949	1	111	2010-06-30	PRIMARY LANGUAGE CODE	5000	X	-

- The records were rejected because of validation violations
- These lookup codes do not exist on the Master Lookup Table

➤ Data Verification & Data Quality Reports

- Reports that have been developed to support data submissions for the Dashboard participating LEAs
- 2 data summary report
- 33 template verification reports
- 3 data quality reports to identify data scenarios that may cause access or functional issues in the Dashboard application
- The complete Requirements document is included in this course: Document #C7.7

➤ Data Summary & Data Quality Reports

Data Summary Reports

- Dashboard Data Submission Summary Report – All Templates
- Dashboard Data Submission Report - Core Required Templates

Data Quality Reports

- Course & Discipline Data Quality Report
- Staff & Cohort Data Quality Report
- Student Record Data Quality Report

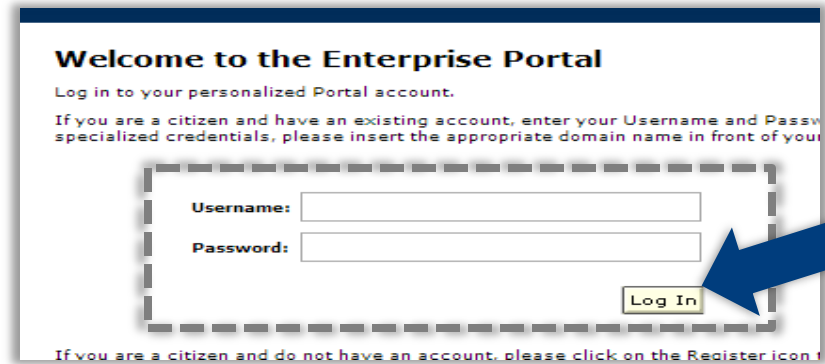
➤ Template Verification Reports I

Academic Record - Student Course Transcript Template Verification Report
Academic Record - Student Credit GPA Template Verification Report
Assessment - Academic Standards Document Template Verification Report
Assessment - Academic Standards Template Verification Report
Assessment - Assessment ItemR Academic Standards Template Verification
Assessment - Student Local Assessment Objective Template Verification
Assessment - Student Local Assessment Question Template Verification
Assessment - Student Local Assessment Subtest Template Verification
Attendance - Staff Attendance Template Verification
Attendance - Student Course Attendance Template Verification
Attendance - Student Daily Attendance Template Verification
Course & Grades - Course Instructor Snapshot Template Verification
Course & Grades - Course Template Verification
Course & Grades - Student Class Grade Detail Template Verification
Course & Grades - Student Course Enrollment Template Verification
Discipline - Incident Offender Disciplinary Action Template Verification
Discipline - Incident Offender Infraction Template Verification
Discipline - Incident Offender Template Verification
Discipline - Incident Template Verification
Discipline - Person Template Verification
Enrollment - School Enrollment Template Verification

➤ Template Verification Reports II

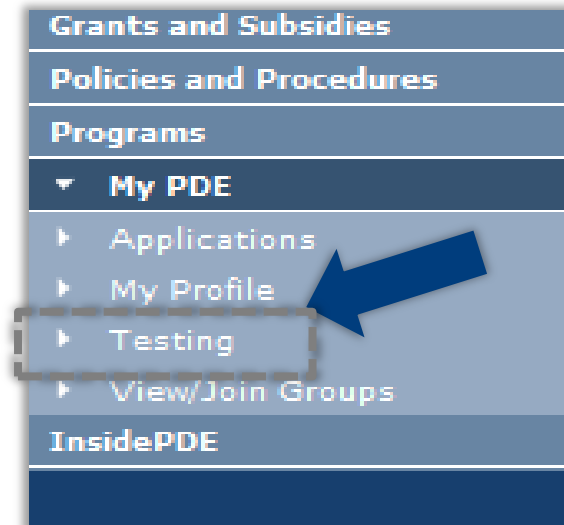
Groups & Programs - Cohort Group Template Verification
Groups & Programs - Programs Fact Template Verification
Groups & Programs - Staff Assigned Cohort Group Template Verification
Groups & Programs - Student Cohort Group Fact Template Verification
Location - Location Marking Period Template Verification
Location - Location MP Calendar Date Template Verification
Staff - Staff Assignment Template Verification
Staff - Staff Snapshot Template Verification
Student - Contact Template Verification
Student - Student Academic Plan Template Verification
Student - Student Contact Fact Template Verification
Student - Student Snapshot Template Verification

➤ Accessing Data Verification Reports I



1. Go to:
<http://www.education.state.pa.us>
and click on Log In
2. Enter your username and password when prompted

➤ Accessing Data Verification Reports II



3. Click on My PDE
4. Select Testing under My PDE

➤ Accessing Data Verification Reports III

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PA STATE AGENCIES

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Codes and Regulations

Data and Statistics

Forms and Documents

Grants and Subsidies

Policies and Procedures

Home >> My PDE >> Testing

My PDE Apps

You are currently authorized to access the following PDE applications. Select the App ID to open the application in a new window. To change your application registration options, edit your User Account Profile.


Application Abbreviation	Application Name	Due Date	Community	Info	Status
Dashboard	Dashbo				
PIMS					
PIMS Repor	PIMSReports				

Icon Key:

- Open the information page for this application
- Open the community associated with this application
- This application is not currently available
- This application is not available via your current network connection

5. Select PIMS Reports from MY PDE Apps

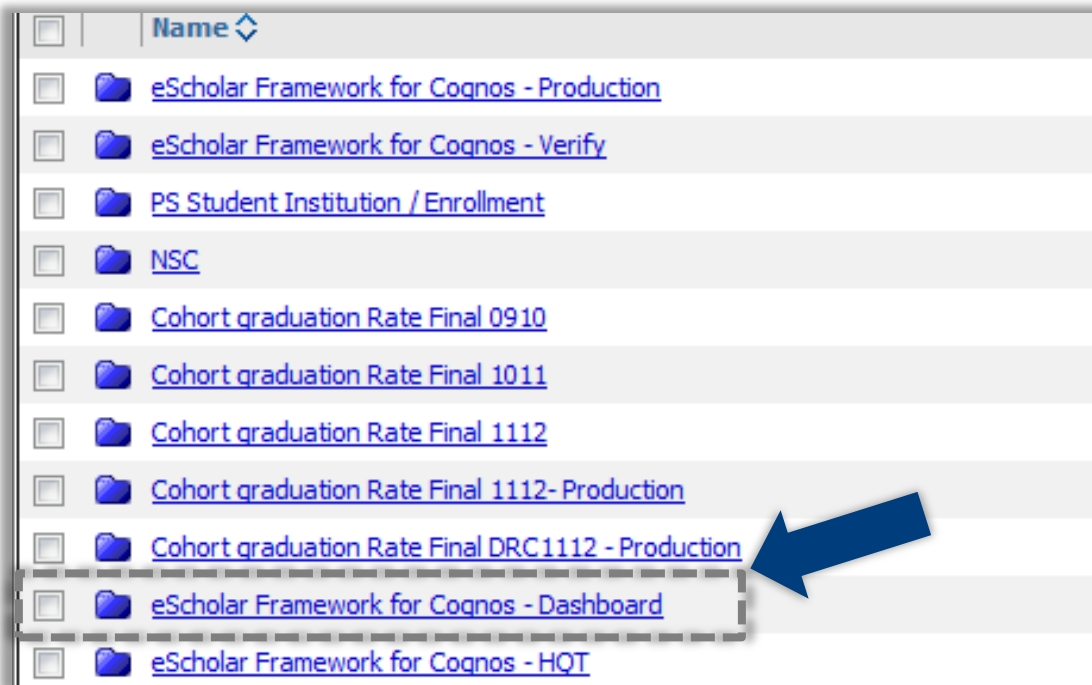
100



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➤ Accessing Data Verification Reports IV

6. Click on eScholar Framework for Cognos - Dashboard
7. Then select Dashboard Data Submission Verification Reports



➤ Loading the Dashboard Data Mart

➤ Loading Data to the Dashboard Data Mart

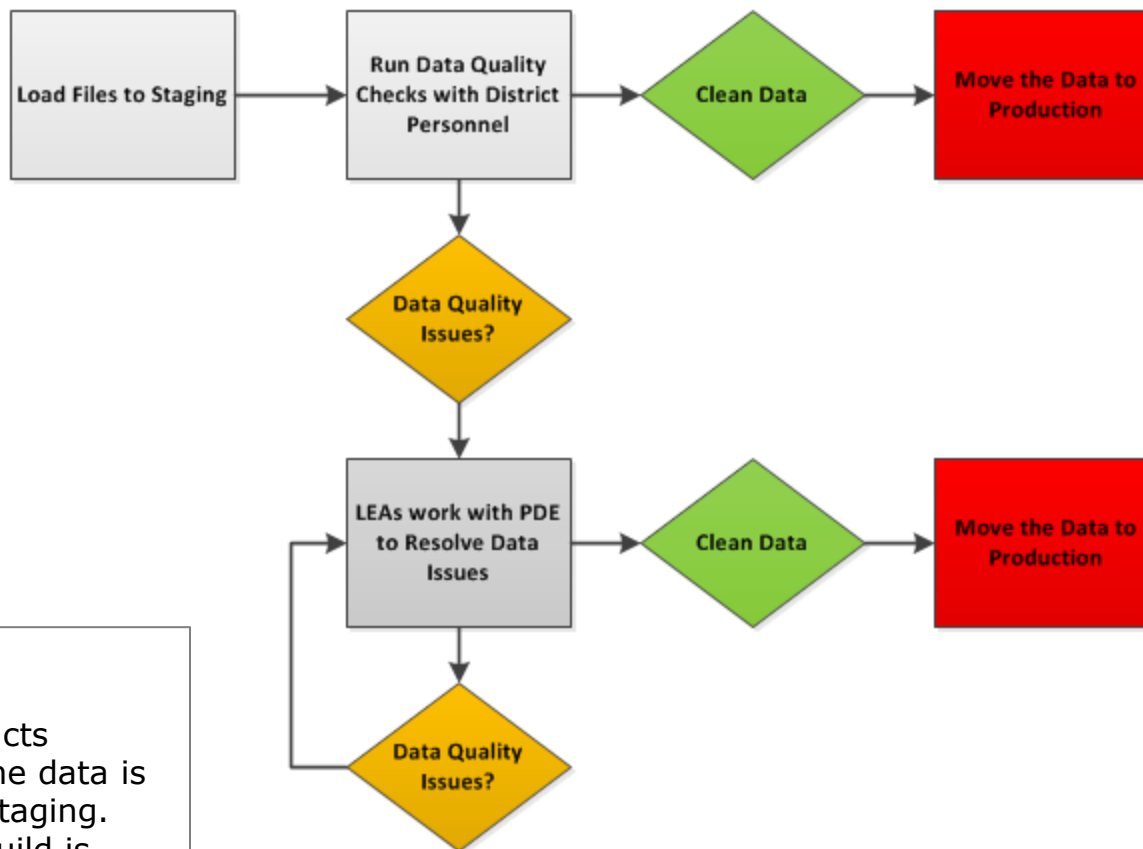
- The load to the Dashboard Data Mart (DDM) is a nightly routine that runs automatically once the system has been configured
- The LEA data steward does not have to initiate or monitor the process
- If it has been verified that the data has successfully loaded to PIMS, then the data will be rendered in the Dashboard the following day

➤ Verifying the Data Load to the DDM



- The Dashboard metrics show the latest date of data refresh
- If the data has successfully populated the Dashboard, this date should be current

Staging to Production



Staging to Production

- When districts onboard, the data is loaded to staging.
- Once the build is clean, the data is moved to Production

➤ Data Quality Checks

➤ Why Run the Data Quality Checks?

- The Dashboard is populated nightly through the extract process that loads the DDM
- While this process runs in the background and doesn't require any human intervention, the results need to be monitored
 - Once the initial launch period is complete, the need for monitoring will scale back
- There are two possible situations that may render as data quality issues:
 - The extract process has an issue
 - The data keyed into the source system is incorrect

➤ Who Should Participate?

- Ideally a cross-section of district staff will have an opportunity to review the data quality
- Staff members with different levels of access to the Dashboard will see different data sets
 - This perspective is helpful in vetting the Dashboard
- The Dashboard roles should be represented, including:
 - Administrator
 - Staff
 - Intervention Catalog Coordinator
 - Dashboard Administrator

➤ Recommendations for Staff Participation

Administrator	Staff	IC Coordinator	Dashboard Administrator
2-3 district administrators	5-6 staff members from various schools and grade levels	Minimum 1 Intervention Catalog Coordinator	1 Dashboard Administrator
2-3 building level administrators			

➤ Guidance for Facilitation

- Provide the Data Quality Check participants with their Dashboard log-in credentials
- Distribute the Guided Practice Activities with the data quality check instructions to each participant *according to their district and dashboard role*
- Allow sufficient time for participants to complete the data quality checks
- Direct participants to complete the feedback forms in the Guided Practice Activities

➤ Guided Practice Activity #1 – Data Quality Check

- Complete the role-appropriate Guided Practice Activities as per the instructions provided by your instructor.
- Complete the feedback forms and return to the district Dashboard Administrator.

➤ Managing Claim Sets and Cohorts

Claim Sets Overview



Grand Bend ISD

Site Configuration

Claim Sets

Metric Settings

Photo Management

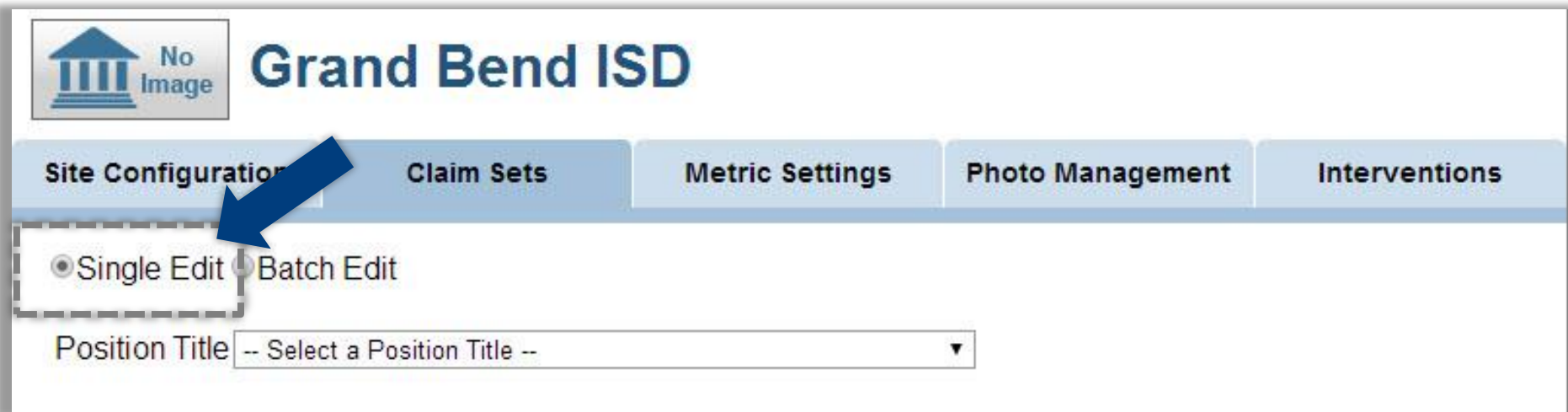
Interventions

☒ Single Edit ☐ Batch Edit

Position Title

- Claim Sets are the rights and permissions assigned to a position title (teacher, counselor, principal, etc.) within the dashboard
- Claim sets determine what components of the Dashboard are available to an end user
- Each Dashboard user needs to be assigned a claim set

➤ Claim Sets: Single Edit



The screenshot shows the Grand Bend ISD dashboard. At the top left is a logo with a building icon and the text 'No Image'. To its right is the title 'Grand Bend ISD'. Below the title is a horizontal navigation bar with five tabs: 'Site Configuration', 'Claim Sets', 'Metric Settings', 'Photo Management', and 'Interventions'. The 'Claim Sets' tab is active. Below the navigation bar, there are two radio buttons: 'Single Edit' (which is selected) and 'Batch Edit'. A blue arrow points to the 'Single Edit' radio button. Below the radio buttons is a dropdown menu labeled 'Position Title' with the text '-- Select a Position Title --' and a downward arrow.

- The Dashboard Administrator can edit the claim set for a single position title at a time or perform a batch edit
- In this case, the Single Edit radio button is selected

➤ Select a Position Title

☒ Single Edit ☐ Batch Edit

Position Title

-- Select a Position Title --

-- Select a Position Title --

1ST GRADE TEACHER
2ND GRADE TEACHER
3RD GRADE TEACHER
4TH GRADE TEACHER
5TH GRADE TEACHER
9920
ELEMENTARY ART TEACHER
ELEMENTARY MUSIC TEACHER
ELEMENTARY PHYSICAL EDUCATION TEACHER
ELEMENTARY SCHOOL ADMINISTRATOR
ELEMENTARY SCHOOL CLERK
HIGH SCHOOL CLERK
HIGH SCHOOL COUNSELOR
HIGH SCHOOL ELA TEACHER
HIGH SCHOOL ELECTRONIC ARTS TEACHER
HIGH SCHOOL HEALTH TEACHER
HIGH SCHOOL HUMANITIES/WRITING TEACHER
HIGH SCHOOL MATH TEACHER
HIGH SCHOOL SCHOOL ADMINISTRATOR

- The Position Title menu is populated by the local source system
- Each LEA will have different menu options
- Select the single position title that will be edited

➤ Select Claim Set

☒ Single Edit ☐ Batch Edit

Position Title 1ST GRADE TEACHER

Claim Set

- Select a ClaimSet --
- Select a ClaimSet --
- None
- SystemAdministrator
- Superintendent
- Principal**
- Administration
- Leader
- Specialist
- Staff
- InterventionAdministrator

- Once the Position Title is selected, the Dashboard Administrator selects the appropriate claim set from the pre-determined list
- This determines rights and access for this Dashboard user role

Dashboard Claim Sets

Claim Sets

System Administrator	Superintendent
Principal	Administration
Leader	Specialist
Staff	Intervention Administrator

- Users can be assigned multiple roles within the Dashboard
 - For example, a user can be both a Staff member and an Intervention Administrator
 - Users will still only be able to see their own students
- Users can also be assigned multiple staff assignment codes in PIMS

▶ Dashboard Only Assignment Codes

Assignment Code	Assignment Description	Dashboard Staff Classification
0001	Counselor	Counselor
0002	Teacher	Teacher
0003	Other	Other
0004	Assistant Superintendent	Assistant Superintendent
0005	Superintendent	Superintendent
0006	LEA Administrator	LEA Administrator
0007	School Administrator	School Administrator
0008	School Specialist	School Specialist
0009	LEA Specialist	LEA Specialist
0010	Substitute Teacher	Substitute Teacher
0011	School Leader	School Leader
0012	Instructional Coordinator	Instructional Coordinator
0013	Librarians/Media Specialists	Librarians/Media Specialists
0014	Support Services Staff	Support Services Staff
0015	Operational Support	Operational Support
0016	Instructional Aide	Instructional Aide
0017	State Administrator	State Administrator
0018	Principal	Principal
0019	Assistant Principal	Assistant Principal
0020	LEA System Administrator	LEA System Administrator

➤ Save Edits

☒ Single Edit ☐ Batch Edit

Position Title 1ST GRADE TEACHER

Claim Set Staff ▼

SAVE →

- Once the appropriate selections have been made, click Save

➤ Claim Sets: Batch Edit



Grand Bend ISD

Site Configuration

Claim Sets

Metric Settings

Photo Management

Interventions

☒ Single Edit ☐ Batch Edit



Position Title -- Select a Position Title --

- Batch Edits allow the Dashboard Administrator to map multiple position titles to claim sets at once
- The first step is selecting the Batch Edit radio button

➤ Batch Edit: Export User Roles

Site Configuration Claim Sets Metric Settings Photo Management Interventions

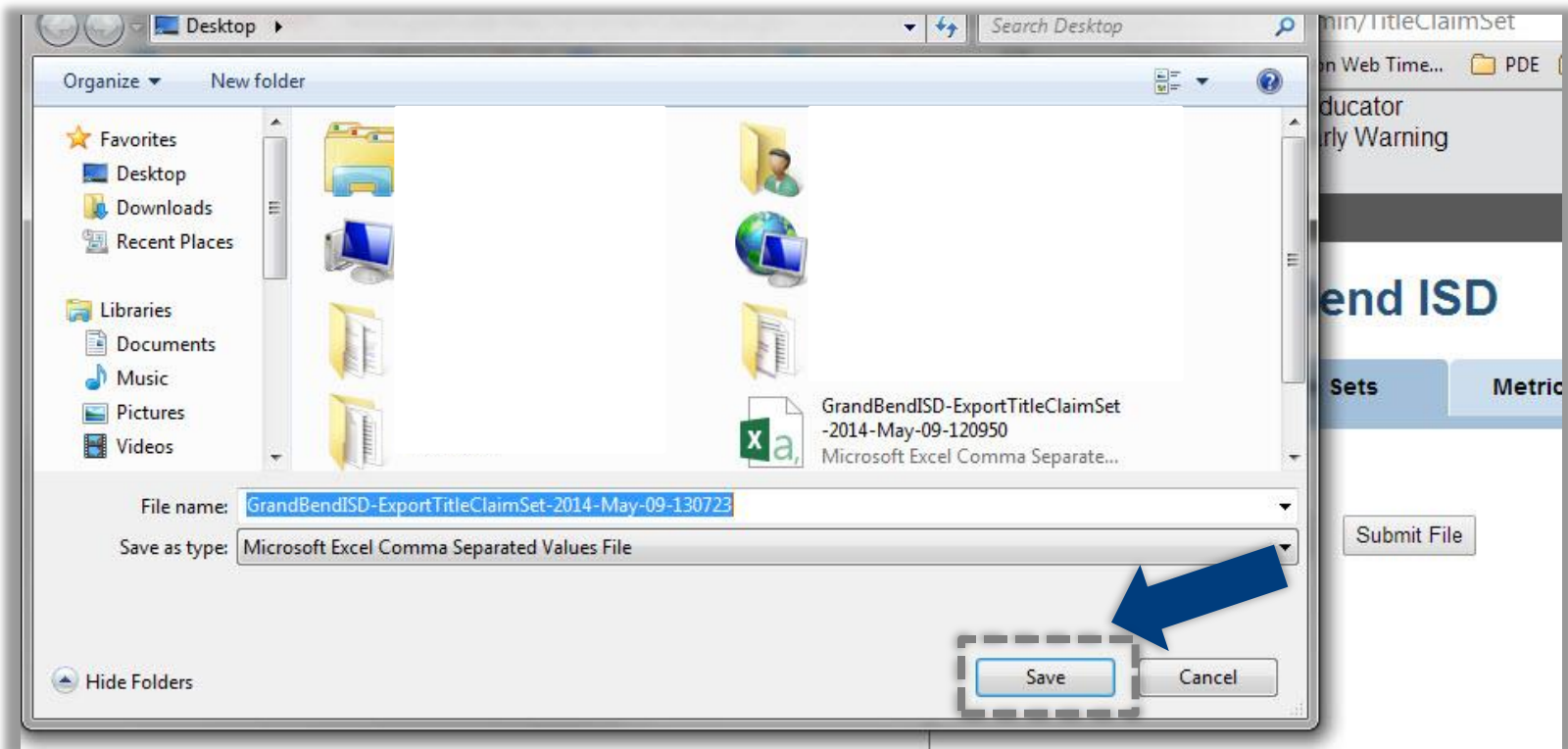
☐ Single Edit ☒ Batch Edit

Browse Submit File

User Roles Template

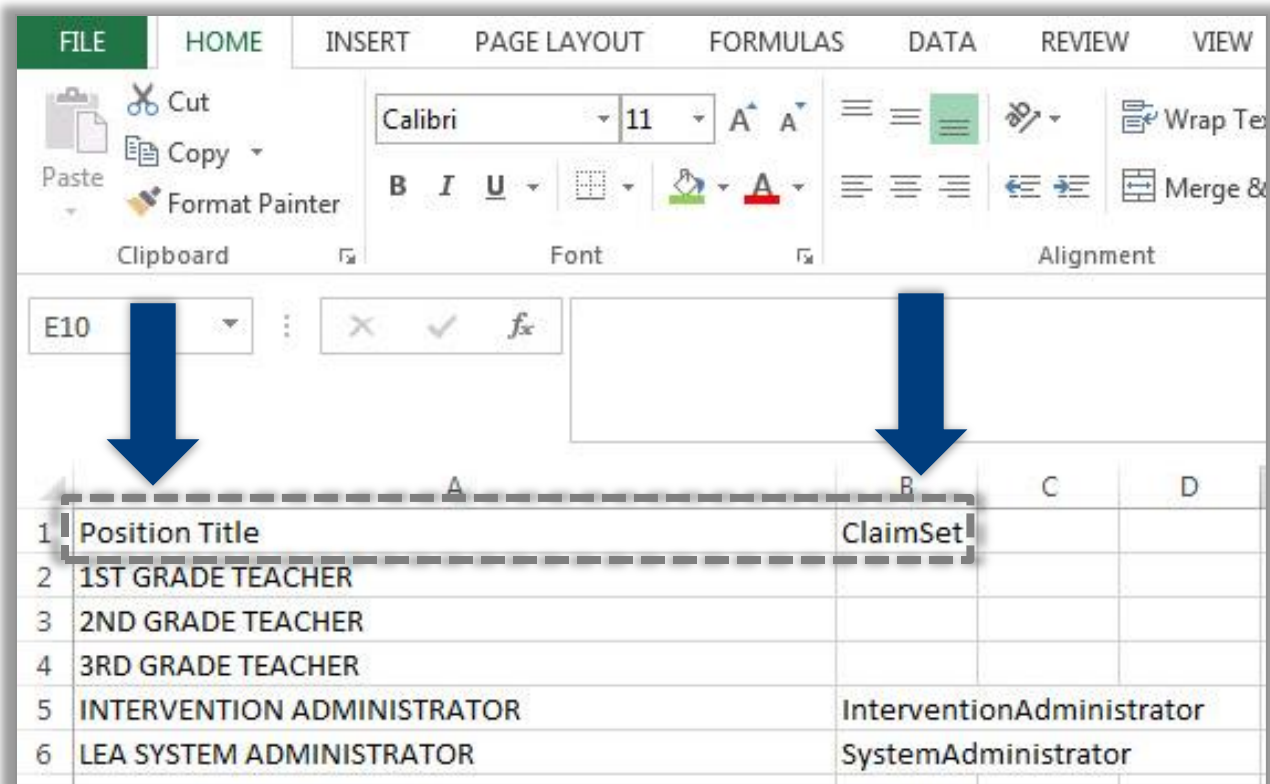
- Next select the User Roles Template to export the current list of local position titles and claim sets
- Note that the first time this is completed the template will be blank

➤ Batch Edit: Export User Roles II



- Browse to a location
- Save the file locally so it can be edited

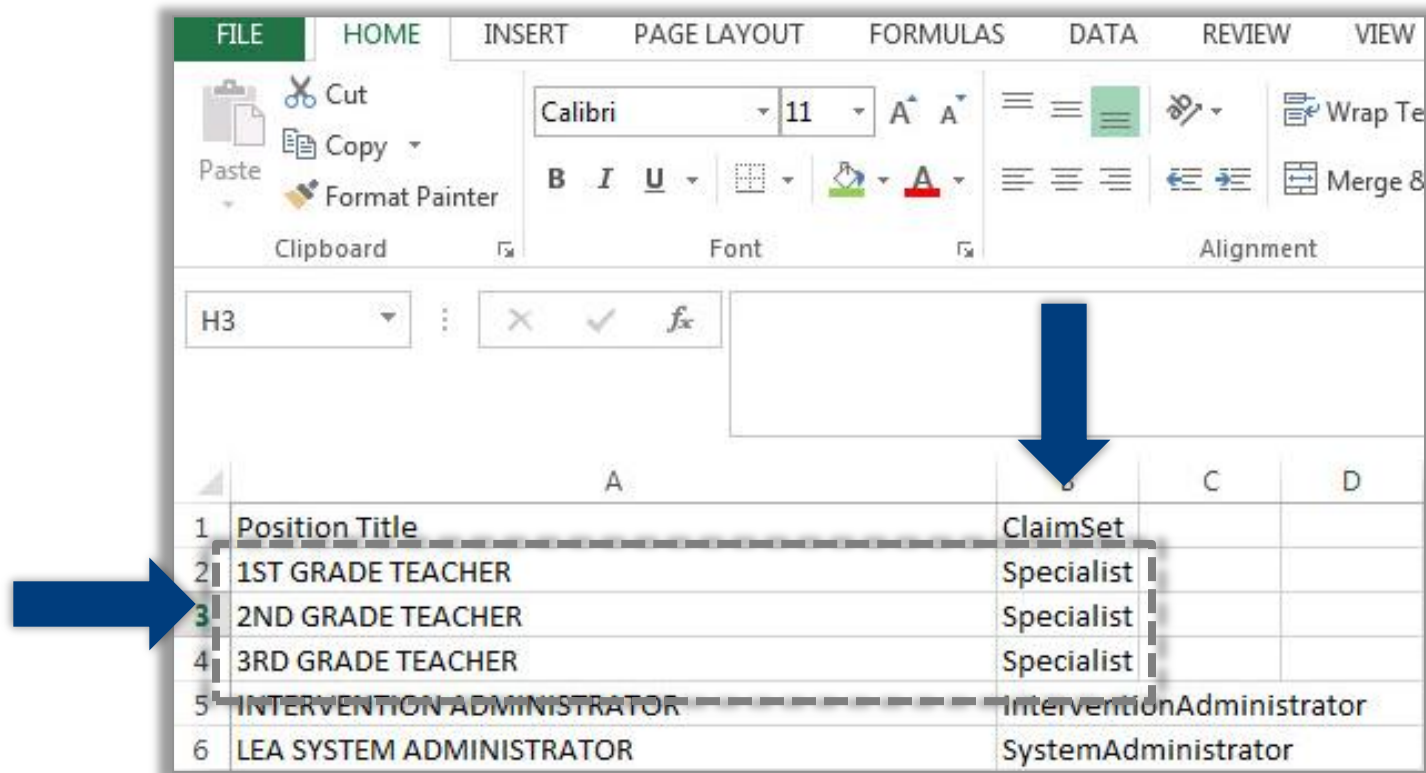
Batch Edit: User Role Template I



	A	B	C	D
1	Position Title	ClaimSet		
2	1ST GRADE TEACHER			
3	2ND GRADE TEACHER			
4	3RD GRADE TEACHER			
5	INTERVENTION ADMINISTRATOR	InterventionAdministrator		
6	LEA SYSTEM ADMINISTRATOR	SystemAdministrator		

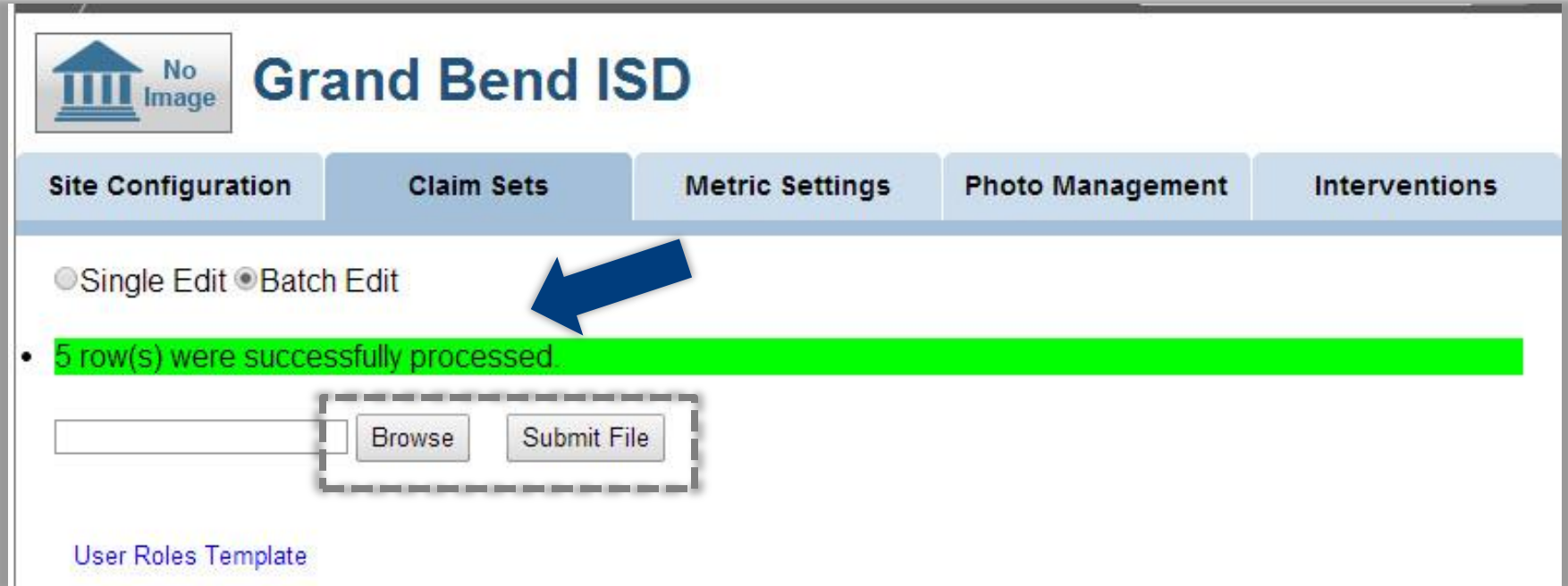
- Map the position titles to the claim sets
- Be sure to use correct spelling and punctuation
- Cells can left EMPTY or filled in with NONE as the value

➤ Batch Edit: User Role Template II



- In this case, the 1st, 2nd and 3rd grade teachers will be specialists
- Once the mapping is complete, save the file

➤ Batch Edit: Submit File to System



The screenshot shows the Grand Bend ISD web application interface. At the top, there is a header with the school district logo (a building icon with 'No Image' text) and the name 'Grand Bend ISD'. Below the header is a navigation bar with five tabs: 'Site Configuration', 'Claim Sets', 'Metric Settings', 'Photo Management', and 'Interventions'. The 'Claim Sets' tab is currently selected. Below the navigation bar, there are two radio buttons: 'Single Edit' and 'Batch Edit'. The 'Batch Edit' radio button is selected, and a large blue arrow points to it. Below the radio buttons, a green bar contains the text '5 row(s) were successfully processed.' Below this bar, there is a file upload section with a text input field, a 'Browse' button, and a 'Submit File' button. A dashed box highlights the 'Browse' and 'Submit File' buttons. At the bottom left of the interface, there is a link labeled 'User Roles Template'.

- Use the browse button to select the updated.csv file from your local drive
- Click submit to upload the file
- Note the confirmation highlighted in green
- Test to see if the mapping was successful by impersonating user

Staff Assignment Codes & Dashboard Access

Assignment Code	Assignment Description	Alternate Assignment Category (Ed-Fi Staff Classification Mapping)	View My Metrics	View My Students (Determined by Course Instructor records)	View All Metrics	View All Students	View All Teachers	View Operational Dashboard	Assign Intervention	Manage Intervention Catalog	Administer Dashboard	Manage Goals	Access Organization	Impersonate Users
0006	LEA Administrator	LEA Administrator	X	X	X	X			X					
0009	LEA Specialist	LEA Specialist	X							X				
0010	Substitute Teacher	Substitute Teacher	X	X										
0016	Instructional Aide	Instructional Aide	X	X										
0020	LEA System Administrator	LEA System Administrator	X	X	X	X	X	X	X	X	X	X	X	X
1001	Computer Science, Elementary	Teacher	X	X										
1002	Computer Science, Secondary	Teacher	X	X										
1099	Chief Administrative or Chief Executive Officer (charter schools only)	School Administrator	X	X	X	X			X					
1100	Elementary Principal	Principal	X	X	X	X	X	X	X	X				
1101	Assistant or Vice Elementary Principal	Assistant Principal	X	X	X	X	X	X	X	X				
1105	Secondary Principal	Principal	X	X	X	X	X	X	X	X				
1106	Assistant or Vice Secondary Principal	Assistant Principal	X	X	X	X	X	X	X	X				
1111	Principal, K12 or Middle School	Principal	X	X	X	X	X	X	X	X				
1112	Assistant or Vice Middle School Principal	Assistant Principal	X	X	X	X	X	X	X	X				
1130	Director of Athletics	Operational Support	X											
1150	Superintendent	Superintendent	X	X	X	X	X	X	X	X		X		

- PDE has mapped out LEA Staff Assignment Codes to recommended Dashboard Access Privileges
- It is noted that in some districts, roles may be assigned according to local business needs
- The entire document is packaged with this course: Document #C7.5

➤ Groups & Programs Domain

- The Groups & Programs domain allows LEAs to create cohorts of students associated with a staff member
- The cohort creates the association when the staff member doesn't have access to these students in the default student roster
- The templates in this domain are *optional*

➤ Cohort Example

Below is an example of how a cohort may be used:

- Mr. Smith is the band leader. He doesn't teach the students during the day, but after school he works with the entire marching band.
- Through submission of the templates in the Groups & Programs Domain, the data steward can create a band cohort for Mr. Smith. He would then be able to see these students in the PDE Educator Dashboard.
- Mr. Smith may not be a teacher, but he is an important adult for his band members. His active participation in progress monitoring and data discussions is valuable.

➤ Groups & Programs Domain Templates

The following templates are included in the Groups & Programs Domain:

- Programs Fact
- Cohort Group
- Staff Assigned Cohort Group
- Student Cohort Group Fact

Reference the LEA Dashboard Data Submission User Manual – Volume I for additional information

➤ PDE Help Desk

➤ Support for the Dashboard

PDE is prepared to provide support for the Dashboard:

If you are having issues with uploading files to PIMS, PIMS representatives can be reached by phone at **1-800-661-2423** or online through <http://www.education.state.pa.us>

Accessing help from the PDE Home Page:

- from the blue PDE Search bar on the left, select "Programs"
- select "Programs O – R"
- select "PIMS"
- select "PIMS Help"
- from the body of the text, select "Help Request Form."

➤ Support for the Dashboard

For questions regarding Dashboard EWS and intervention catalog, please send an email to:

RA-EDEWSINFO@pa.gov

Next Steps

- Create a PDE portal account.
- Get a PPID.
- Check with your SIS vendor if the extracts for Dashboard EWS are ready.
- Request access to “Testing” platform for PIMS, PIMS Reports and Dashboard by emailing your first name, last name and email address to : RA-EDEWSINFO@pa.gov.
- Once you have access to Testing, begin uploading data.

➤ Wrap Up, Assessment and Evaluation

➤ Wrap Up, Assessment and Evaluation

Wrap Up

- Describe the high level data flow process within eDM.
- What types of validations are implemented in File Manager?
- What does the ETL process do?
- Who should participate in the Data Quality Checks?

➤ Wrap Up, Assessment and Evaluation

Assessment

- Take a moment and answer the questions on the brief assessment

Assessment

➤ Wrap Up, Assessment and Evaluation

Evaluation

- Take a moment and answer the questions on the brief evaluation survey

Evaluation

For more information on the PDE Educator Dashboard
Administrator Course, please email :
RA-EDEWSINFO@pa.gov

The mission of the department is to academically prepare children and adults to succeed as productive citizens. The department seeks to ensure that the technical support, resources and opportunities are in place for all students, whether children or adults, to receive a high quality education.