TSDS PEIMS Submission Checklist
Revised October 4, 2017

<u>Roles</u>
Technical Director – PEIMS Data Submitter
               ODS Data Loader
               Service Account Manager

PEIMS Coordinator – PEIMS Data Completer
               ODS Data Loader
               Service Account Manager

Superintendent – PEIMS Data Approver

Ask your Tech to install TeamViewer and Notepad ++ on your desktop.

If your software requires that you extract interchange files from both the financial/HR side and the student side, be sure to extract the files from the financial/HR side first. Save them all in the same folder.

<u>Apply for TSDS PEIMS Role</u>
If you already have Texas Student Data Portal, click on **Add/Modify Access** and follow steps below beginning on Number 2.
If you do not have Texas Student Data Portal, click on **My Application Accounts** in the left menu. Then select **Request New Account**.
1. Select **Texas Student Data System** from the dropdown menu.
2. Click on **Add Access**. Type in district name under **Employing Organization.** When you see your district's name come up, click on it.
3. Select **ODS Data Loader and PEIMS Data Completer**. After each role, you will select the applicable privileges from the dropdown box.
4. After each role request, type in your county/district number and click on your district's name under **Requesting Organization.**
5. Click on **Done**.
6. When the next page comes up, click on **Save Changes**.
7. Notify your superintendent that you have a TSDS application waiting for approval.
8. Your TSDS role will appear on the TEAL Home Page under Texas Student Data System Portal.

(A) Converter and Validator Tool
1. Download into your computer by accessing **Utilities** in TEAL and saving on your desktop.
2. Access **Validation Tool** icon on desktop/Update latest version. New Version released 10/27/17.
3. Click on **File/Validation Tool.**
4. Select **correct year and Collection**.
5. Select **Browse** and access folder where interchanges were saved.
6. Select all interchanges and click on **Open.**
7. After loading all interchanges required for that collection, select **Process Files**.
8. Message appears that indicates whether each file "Passed" or "Failed".
9. If a file failed, click on "**Details**" to see the errors (early validations for PEIMS errors)
10. Correct errors in software, re-extract, and validate again.

You can either send your interchange files through the eDM using the manual File and Batch Manager as explained in (B) below. Or you can transmit your interchange files automatically through the DTU.

Follow this method the first time you load interchange files into TSDS.

(B) Manually Loading Files into EDM (eData Manager) from the Converter & Validator Tool
1. From the TEAL TSDS Portal, click on **Manage Data Loads** to move to File Manager.
2. Under Interchange Menu, click on **Interchange Upload**.
3. Select Interchange collection.
4. Browse for interchange files saved in a folder on your computer. Highlight all of the files, right click, Save to / Compressed zip file. If your files will not highlight, minimize the TSDS system and go to the folder where you saved your interchange files. Highlight all of them there, right click, Save to / Compressed Zip File and then go back to TSDS. Browse and load zip file in File 1 in the File Manager. The system will load the interchange files in the correct order. Or you can load your interchange files separately in the correct order.
5. Click **Upload**. Click on blue Refresh arrows to update Status.
6. If Status column shows Validation Failed, indicated by a red X, errors must be corrected.
7. Click on magnifying glass of failed validation files to view errors.
8. Click on **View File Content** across from the line that begins with "Error" to view your errors.
9. Make corrections in software, save file on PC and delete incorrect file. Start over at #1 and this time only select the file that was corrected. Or you can start over and select all of the files.
10. When all files have successfully been validated and receive green check marks, select **Add to Batch**.
11. Click on **View Batch** and add Batch notes as necessary.

12. Select **Process Batch** to move to Batch Manager (Click on blue Refresh arrows—does not automatically refresh). This may take a while.
13. If batch shows a red X under Data Status, click on the magnifying glass.
14. Scroll to the bottom of the screen and click on **View File Content** across from the line that begins with "Error" to view your errors.
15. Correct errors in software and start process over again from the beginning.
16. If there are no errors, click on **TSDS Logo** at the top of the screen to return to Home Page.

(C) Promoting Data into the PEIMS Data Mart (PDM)
1. Click on **Promote Loaded Data**.
2. Check top of screen to make sure you are in the correct collection.
3. Select **Categories and Subcategories**.
4. Enter **Data Promotion Name** (collection, date, and time).
5. Select **Next** and review selected subcategories.
6. Select **Submit**. Click on **Refresh arrows** to update status**.**
7. View error reports by clicking on **View.**
8. Correct failed records in software and begin process over again.
9. When status says Completed or Completed with Errors, click on **Validations** tab and **Validate Submission Data**.
10. Select **Categories and Subcategories**.
11. Enter **Validation Name** (collection, date, and time).
12. Click **Next**.
13. Review selected subcategories.
14. Select **Submit.** Click on **Refresh arrows** to update status.
15. View errors under **Error Report**.
16. You can select PDF, XLS or Print to print errors.
17. Type in Search box to select specific errors, i.e. Fatals, Warnings, etc. or particular campus.
18. For all district errors, click on **LEA Validation Errors**.
19. Correct errors in software and start process from the beginning.
20. Select **Access Data** to do data searches.
21. Click on **View Reports** to verify that your data is correct.

(D) To Complete the TSDS PEIMS Submission
1. Click on **Prepare and Finalize**.
2. Status says "**LEA Collection Status Validated.**"
3. Select all files and click on **Verify**.
4. Status says "Verified".
5. If "0" Fatals, click on **Complete**.
6. Message will say "**Completion in Progress**".

7. A bar will display "Completion Process Status".
8. Click on acknowledgement box to verify that submission has been validated and reviewed for accuracy and authenticity and Special Warnings and Warnings have been reviewed and confirmed.
9. Click on **Confirm**.
10. Box will appear to enter a **comment and Save and Continue**.
11. Message appears stating "**LEA Data Complete**".
12. Superintendent logs in to TSDS.
13. Click on **Prepare/Finalize Data**.
14. At the top right, there is **Approve/Reject**.
15. Click on **Approve.** Scroll to bottom and click on **Confirm.**
16. Enter **Comment** and click on **Save/Continue**.
17. Go back to **Prepare/Finalize** Submission and click on **View SOA form** (electronically signed)
18. Print and keep for your records.

Remember to always make corrections/changes in your software and go through the TSDS process again from the beginning. <u>NEVER make changes in the interchange files.</u> Viewing data in the interchange files should be used ONLY as a tool to assist in finding errors.

Resolving Errors:
1. When you get an "X" on an interchange file, click on the spy glass and then View **Details** to see the error message.
2. Try to get a specific piece of information that you can conduct a "**Search**," such as Unique ID, Name, or Class ID.
3. Go to the saved interchanges in your PC and open the interchange that contains the error.
4. Hold down the Control key and type "F." A Search Box opens so that you can type that specific bit of information and press the Enter Key. Each time you press the Enter Key, it goes to the next time that information is found.
5. Look at the xml interchange file structure and compare with sample interchange file structure in TEDS 8.7. Make sure that each data element reported in the subcategory of the submission that you are working on in that interchange, has data and that data is in the correct format.
6. **Always make corrections and changes in your software and begin the TSDS upload process from the beginning again.**

Other Tips:

1. Use Internet Explorer as your browser. Other browsers might work, however you may not have all of the functionalities of the system available.
2. When saving interchange files in your PC, delete the previously saved interchange files.
3. If a correction is made in your software, delete all of the interchange files and resave all of them. That data may be included in more than one interchange file.
4. I would move the interchange files from one process to the next all together so that you can keep up with which ones are completed.
5. Delete previous failed interchange files out of File Manager before you upload that interchange file in there again.
6. **Remember data is not removed by uploaded files once it has been loaded into the ODS. Data is only replaced or added by files loaded in the ODS. To remove data, you will need to delete your files by utilizing the Delete Utility.**
7. Every time you promote new data in the PEIMS Data Mart, click on arrows under Run to regenerate the reports showing the current data.