U.S. DEPARTMENT OF EDUCATION

ED*Facts* Submission System (ESS) User Guide

Version 10.0

November 2013

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PREFACE

This User Guide provides assistance to new users of the ED*Facts* Submission System (ESS). It addresses the basic mechanics of system access and data submission. The Figures in this document use screen prints of the ESS to depict step-by-step instructions for ESS users.

This guide will be updated annually and when major system modifications affect user procedures.

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1 INTRODUCTION

ED*Facts* is a collaborative effort among the U.S. Department of Education (ED), State Education Agencies (SEAs), and industry partners to improve the quality and timeliness of education information. ED*Facts* is the foundation and primary collection system for elementary and secondary education data, and a centralized information management tool for ED and SEAs. By centralizing ED's data collection and business intelligence capabilities within one repository, ED*Facts* brings a new level of coordination and efficiency among Program Offices within ED, and reduces the burden put upon states to report data to ED.

1.1 Purpose

The purpose of this User Guide is to provide assistance to users accessing and using the ED*Facts* Submission System (ESS). This guide addresses the basic mechanics of system access and transmission submission. Each chapter describes a function of the system: Getting Started; Navigating the ESS; Transmitting Data; Checking Transmission Status; Accessing Error Reports and Progress Reports; Viewing Data; Locating Data Requirements; and Changing Passwords. Throughout the document, bold italics indicate actions a user can take (e.g., a navigation hyperlink or button).

1.2 EDFacts Coordinators and Other Users of the System

Each SEA identifies one staff member who will serve as the ED*Facts* Coordinator. The ED*Facts* Coordinator is the official contact for the ED office responsible for implementing ED*Facts*. The ED*Facts* Coordinator is responsible for ensuring that the ED*Facts* files are submitted, that errors are corrected, and that files are approved for submission to the ED*Facts* Data Repository. In addition, the ED*Facts* Coordinator serves as the SEA contact person for completing the data submission plan and ensuring that paperwork related to ED*Facts* is completed as required.

The ED*Facts* Coordinator may designate other SEA staff or contractors to serve as SEA submitters. These are usually programmers or contractors, who have the knowledge needed to extract the data from existing state systems, input the data into the ED*Facts* file formats, submit the data, and answer questions or address programming issues that arise in the submission of the data. The ED*Facts* Coordinator may also serve as one of the SEA Submitters.

Status e-mail reports are sent to the SEA Submitter who transmitted the file. Either the responsible SEA Submitter or the ED*Facts* Coordinator may respond to the requests for SEA action on errors or warnings.

The Partner Support Center (PSC) will maintain the list of ED*Facts* Coordinators and SEA Submitters (including contact information and login IDs) and update the list when notified of changes by the SEA.

1.3 ESS Disclaimer

The ESS is a United States Government computer system operated and maintained by the U.S. Department of Education, which encourages its use by staff, researchers and contractors. Activity on this system is subject to monitoring in the course of systems administration and to protect the system from unauthorized use. Users are further advised that they have no expectation of privacy while using this system or in any material on this system. Unauthorized use of this system is a violation of federal law and can be punished with fines and imprisonment (P.L. 99-474). Anyone using this system expressly consents to such monitoring and acknowledges that unauthorized use may be reported to the proper authorities.

2 GETTING STARTED

Users can access the ED*Facts* Submission System (ESS) through the Internet at http://www.ed.gov/edfacts. The ESS also can be accessed directly using the following URL: https://eden.ed.gov/EDENPortal/.

2.1 Obtaining User Access

The ESS is a secure site and requires a *User ID* and *Password* to gain access to the functions described in this User Guide. If you do not have a *User ID* and *Password*, please contact the ED*Facts* Partner Support Center (see section 2.2 below).

2.2 Partner Support Center

To assist states with data submission, analysis, and reporting, ED provides a dedicated Partner Support Center (PSC). Comprehensive user support ensures that the ED*Facts* user community understands the system and is able to use its functionality to its fullest extent. PSC's mission is to provide accurate, timely information to SEAs in a courteous, knowledgeable, and professional manner. PSC also distributes e-mail announcements on system shut downs, reminders of due dates, and technical hints. SEA staff members that use ESS automatically receive these e-mails.

The ED*Facts* Partner Support Center (PSC) is available for questions between 8:00 a.m. – 6:00 p.m. Eastern Time (ET). The PSC contact information is as follows:

Telephone:	877-457-3336 (877-HLP-EDEN)
Fax:	888-329-3336 (888-FAX-EDEN)
TTY/TDD:	888-403-3336 (888-403-EDEN)
E-mail:	eden_SS@ed.gov
Web:	www.ed.gov/edfacts/support.html

2.3 Other ED*Facts* Resources

In addition to this user guide, the following documents are available to assist SEAs in submitting data through ESS. All the documents listed below are available on the ED*Facts* Web site – http://www.ed.gov/edfacts.

ED*Facts* Support – This link is designed to provide one stop for resources related to the support and effective use of ED*Facts* for state users. Content includes:

- **Access to the PSC Self-Service Portal**: Use this web portal to log in and view the status of all your PSC support tickets (work orders) or search the knowledgebase of Solutions using keywords, error numbers, school year, file spec number, or application. To browse the complete listing of knowledgebase solution articles instead, see below. Access to this portal must be requested through your state's ED*Facts* Coordinator.

- **Browse the Support Knowledgebase (Solution Articles):** Use this feature to browse the complete listing of solution articles within the PSC support knowledgebase. Solution articles contain information states need to know in order to use ED*Facts* systems effectively and are categorized by Solution Type. Known Issues explain situations encountered with an existing system which are typically corrected via a system release, enhancement request, or requires a user workaround. Technical Tips provide advice on how to make best use of existing ED*Facts* system functionality, typically addressing an area of that requires clarification for the user community.

- **PSC Support Update:** Lists current and past issues of this weekly broadcast to states on how to effectively use ED*Facts* and understand related changes.

- **Tools and Other Downloads:** Includes tools such as the EMDR data dictionary spreadsheets, which have replaced ED*Facts* Data Viewer and the ERS Reports Crosswalk.

- **Training Webinars:** Contains links to recent Webinar recordings and presentation files from PSC training sessions conducted for states.

- **PSC Online Meetings with States:** Includes links to recent Webinar recordings and presentation files from these regular meetings with states.

ED*Facts* Workbook – This document provides information on how to submit files through ESS into ED*Facts*. The workbook assumes a basic understanding of the ED*Facts* data framework.

ED*Facts* Submission System's Release Notes – These documents provide a description of the technical enhancements to each version of ESS.

File Specifications – These documents provide technical instructions for building the files that are submitted through ESS. File specifications apply to a specific school year. XML validation schemas (.xsd) and style sheets (.xsl) are also available.

ED*Facts* Business Rules Guide –Starting with SY 2008-09, these are spreadsheets listing all of the business rules that ESS uses to check the quality of data submitted to the system. A PDF introductory guide accompanies the spreadsheet. The Business Rules Guides (BRG) for SY 2007-08 is a PDF document. Only the BRG for submission years that are currently active are available on this website. As a submission year is closed, the BRG is archived and the link is removed from the website.

ED*Facts* FAQs – This document lists answers to frequently asked questions (FAQs) by newer users.

In addition to these online documents, the following tools are available upon request from PSC (contact information above):

PSC File Format Checker (PSC Internal Tool) – This tool can be installed locally and states can use it to check for non-XML format errors prior to attempting to submit to ESS.

ED*Facts* Community – Joining the ED*Facts* Community site allows coordinators to participate in valuable conversations with peers, browse key discussions from the past, access or upload relevant resources to an open-source library, and engage in a number of other features made available on the site.
You can visit the ED*Facts* Community at https://edfacts.grads360.org. If you are not yet a member, you can request access by emailing your full name and affiliation to accounts@grads360.org. In your email, be sure to specify that you would like to join the ED*Facts* Community.

2.4 Transmittal vs. Submission

The terms transmittal and submission are used throughout ESS and this document. In short, the difference between transmittals and submissions is that a transmittal may contain one or more education units. A submission, however, will contain ALL the education units submitted to date at that level for that school year, regardless of how many transmittals were used to send them. For example, a transmittal may contain one LEA's Membership data. The Membership submission contains all of the Membership data sent in for all LEAs in the state, regardless of how many files have been sent. For the SEA level, the two terms will mean the same thing.

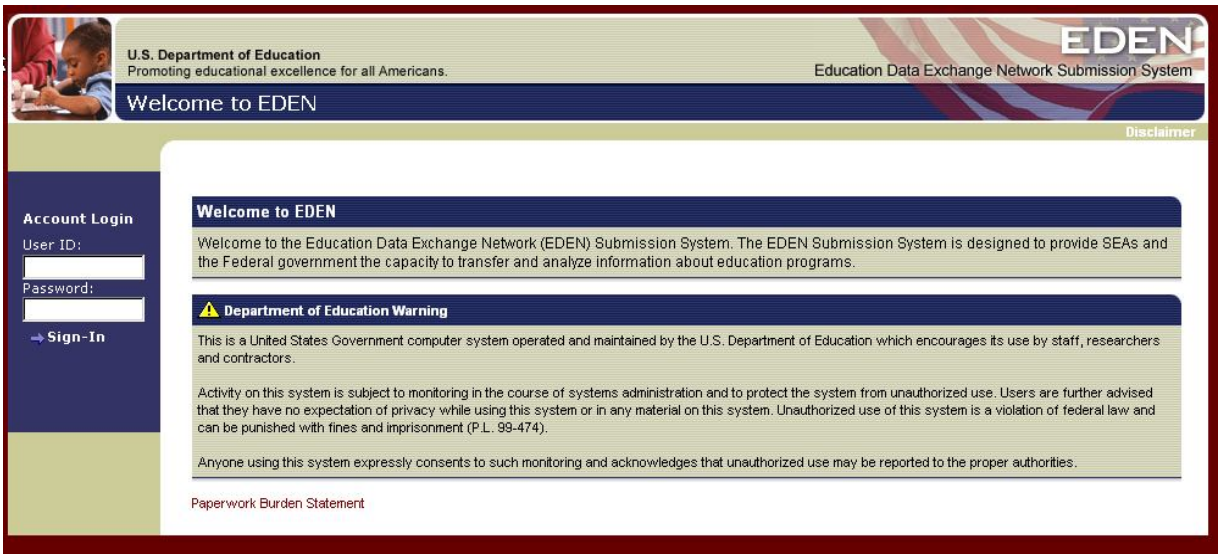
3 NAVIGATING THE ESS

Access the ED*Facts* Submission System (ESS) from the *Welcome to* ED*Facts* home page https://eden.ed.gov/EDENPortal/. The ED*Facts* Welcome page (Figure 3-1) contains three major sections:

- An *Account Login* section on the left side panel. See below for additional information.
- A hyperlink to the ***Department of Education Home*** page. Clicking on the U.S. Department of Education (ED) link on the upper left-hand corner of the page opens the ED Web site in the application window.
- A hyperlink to the ***Paperwork Burden Statement***. The Paperwork Burden Statement will display by clicking on those words at the bottom of the page.

There is also a hyperlink labeled ***Disclaimer*** on the right side of the green border below the Welcome to ED*Facts* banner that will open a pop-up window that displays some important user information regarding accessing ED*Facts*. Any time another URL is accessed from ED*Facts*, you may click the back key on your browser to return to the ED*Facts* application.

Figure 3-1: ED*Facts* Welcome Page



3.1 Logging in to ESS

To use the ED*Facts* application, users must log in at the left side of the screen. Enter your *User ID* and *Password* in the appropriate fields and click the ***Sign In*** hyperlink. Note that the *Password* is case sensitive.

3.2 Logging out of ESS

When you are finished using the application, close the browser or click on the Logoff link at the top right of any page, except a pop-up.

3.3 Description of Functions

With successful logon, the *EDFacts Home* page is displayed. The left side of the page changes to a navigation bar, which includes hyperlinks to various functions of the application called sub-applications. These sub-applications include the following:

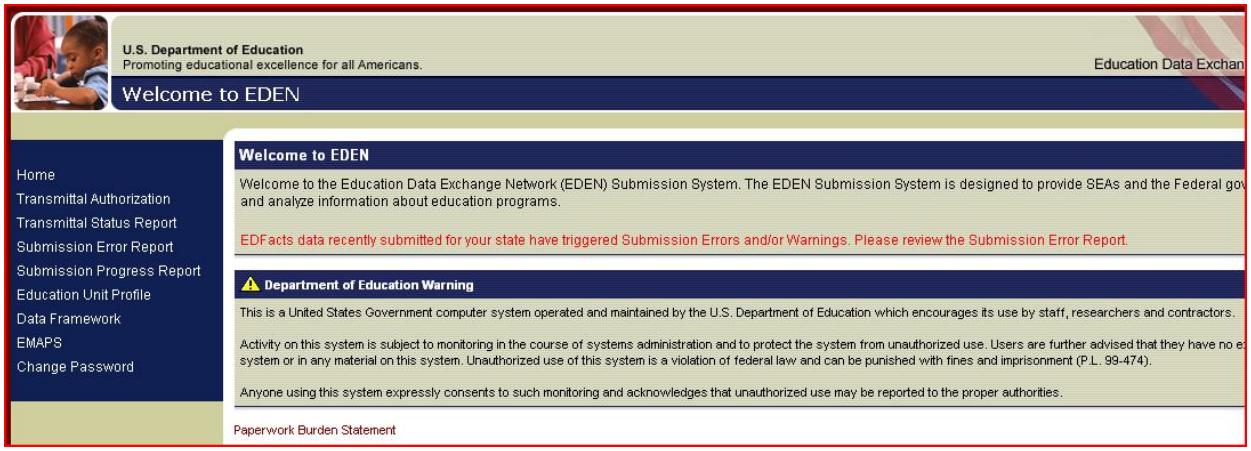
- ***Transmittal Authorization*:** This sub-application allows you to upload files into ESS. See chapter 4 for information about transmitting data.
- ***Transmittal Status Report*:** This sub-application is a report tool that allows you to view the status of each transmittal and the errors associated with each transmittal, and export the error report to Excel. See chapter 5 for information about checking transmittal status.
- ***Submission Error Report*:** This sub-application is a report tool to allow you to view any submission errors for the data submitted for the selected school year, starting with SY2007-08. See chapter 6 for information about viewing submission errors.
- ***Submission Progress Report*:** This sub-application is a report tool to allow you to view where you are in the yearly submission process, as well as data submitted as part of that submission. You can view the submission status by state, LEA, or school level. See chapter 7 for information about viewing your submission progress.
- ***Education Unit Profile*:** This sub-application allows you view and verify your data by state, LEA, or school. See chapter 8 for information about viewing your data.
- ***Data Framework*:** This sub-application provides access to view the ESS data requirements including: data groups and definitions; category sets associated with table data elements; and permitted code values associated with categories or applicable data elements. This area also provides a direct link to file specifications documents associated with the ED*Facts* Submission System (ESS). See chapter 9 for information about accessing the data framework.
- ***Contact Support:*** This area provides the days and hours of operation, contact numbers, and email address for PSC.
- ***Change Password*:** This area allows you to change your password as needed. See chapter 10 for information about changing your password.

To access a sub-application, click on the appropriate hyperlink on the navigation bar. The navigation bar is displayed on almost all the pages in the application, enabling you to access another sub-application from virtually anywhere within ED*Facts*.

3.4 ESS Application Navigation Tips

A highlighted hyperlink indicates which section is being displayed. ***Home*** is highlighted signaling that the *EDFacts Home* page is being displayed, as shown in Figure 3-2.

Figure 3-2: ED*Facts* Home Page



3.4.1 Navigation Bar

The navigation bar on the left side of the page contains hyperlinks to the various sub-applications.

There are three additional sub-applications that appear on the navigation bar for some users. These sub-applications are hyperlinks to the ***Consolidated State Performance Report (CSPR) Parts I and II, EDFacts Metadata and Process System (EMAPS),*** and ***Formula Grant Electronic Application System for Indian Education (EASIE) Parts I and II***. These sub-applications appear on the left side navigation bar only if a user has access to them. Please refer to the getting started documents for each individual sub-application for instructions on how to use each function.

3.4.2 Text Highlighting

Any text on a page that can be highlighted or underlined by positioning the cursor over it will perform some action once clicked. For example, a column heading on a report that can be highlighted indicates that a sort can be performed on the data in that column.

3.4.3 GO Hyperlinks

When highlighted and clicked, ***GO*** hyperlinks will initiate various report filters or invoke the display of supplemental reports.

3.4.4 Back Function

When reports are displayed in additional windows (pop-up windows), use the ***Back*** function, to move to a previous window in the pop-up frame. If there is no ***Back*** function provided, right click, and then use the ***Back*** function to move back to a previous window in the pop-up frame.

3.4.5 Report Filters

Several report filters are offered. For the Transmission Status Reports, the Submission Date, Transmittal Status, School Year, and/or a File Specification may be used to define report content. For the Submission Progress Report and the Education Unit Profile, specifying a School Year and Educational Level (SEA, LEA or school) are required to the display the reports.

4 TRANSMITTING DATA: TRANSMISSION AUTHORIZATION

Data enter the ED*Facts* Submission System (ESS) through transmission files.[1] Uploading a transmission file is accomplished by clicking ***Transmission Authorization*** on the navigation bar, which displays the *Transmission Authorization* page (Figure 4-1).

4.1 Transmission Authorization

Once the *Transmission Authorization* page is displayed, follow the steps below to load a transmission file into the ED*Facts* application.

1. Type the full path of the file (including the file extension), or Click on the ***Browse*** button to display a Windows dialog box through which a transmission file can be selected.
2. If the ***Browse*** function is used, highlight the desired file and click the ***Open*** button in the dialog box.
3. The Transmission Authorization field will display the path of the selected file.
4. Click on the ***Upload File*** hyperlink to load the transmission file into the application.

Figure 4-1: Transmission Authorization

While the file is uploading, a progress status box is displayed. Once the progress percentage is 100 percent the file transfer is complete. The progress box can be closed by clicking the ☒ button or by clicking on the box labeled ***Close this window when submission is complete***. The following message will also be displayed on the transmission page under ***Upload File*** that indicates the file transfer is complete: "*The file upload was successful. You will receive an e-mail within 24 hours with the status of the file submission."* You may then submit another file, go to another function in the system, or leave the (ESS).

[1] The layout and content of transmission files are defined by file specifications. See chapter 9 for more information about file specifications.

4.2 File Size and Other Performance Related Topics

Performance testing on the ESS has shown that the ESS can successfully process a file of 300 megabytes. However, the ED*Facts* Portal is a shared environment where processing resources are often used by more than one SEA. This can result in the system being slow. To help manage burden, SEAs should submit files as soon as they are created instead of creating many files and submitting them as a batch. Submitting outside the peak time of 8 AM to 5 PM Eastern Time is also helpful. Files can be submitted over the weekend. However, the system is down for some period of time on most Sundays for routine maintenance.

File processing time is also affected by validation checks. For most files, a series of validation checks occur after the entire file is read into the ED*Facts* system. The records are then grouped according to their LEA and then their school. At this point, validation proceeds through each education unit (LEA or school). The validation checks to make sure that grand totals and subtotals are present and that they are greater than or equal to their respective subtotals.

The ED*Facts* files can be quite large. File size can also affect processing time. While ED has upgraded the ESS to handle much larger files, local internet bandwidth bottlenecks can present problems when submitting very large files. There are two solutions. The first is to use file compression and the second is to split larger files into sections. These solutions are discussed below.

4.2.1 Compressing Large Files

The ESS recognizes files compressed with the Zip data compression algorithm. The ESS accepts Zip files and automatically extracts (i.e., decompresses) the file.

Plain text files, like the EDFACTS files, are amenable to Zip file (*.ZIP) compression. File size reductions of 50 to 95% are common with text files. There are a variety of commercial and free file compression utilities that create Zip files.

To be recognized as Zip files, Zip compressed files must have the .zip extension when uploaded to the ESS. The file name included in the Header Record (or FILETRANSMIT object if XML) should have the extension appropriate to the format of the uncompressed file.

4.2.2 Splitting Large Files

If compression is insufficient to improve transmission performance or it is not available to you, an alternative is to split large files into smaller files. A file <u>must</u> be split at an entity's (school or LEA) boundary; the data for a single education unit must not be split between files. For example, an SEA may submit two files with school-level membership data, perhaps one with one school to test the format and a second file with all the other schools. The system will combine the data from the two files. However, the system cannot combine a file that contains some of the membership data for a school and a

second file that contained the rest of the membership data for the same school. The second file's data for that school will overwrite the first file's data for that school.

Each of the resulting split files must be properly formatted according to the file specification. Each file must have a unique File ID and File Name. Each non-XML file must have a Header Record with the correct record count for the individual file. Each XML file must be a valid XML document with valid FILETRANSMISSION start and end tags.

4.3 Transmission Notifications

There are three types of transmission notification e-mails that are sent to the ED*Facts* Coordinator;

1. When a file is successfully transmitted, an e-mail is sent to the ED*Facts* Coordinator indicating the submitted file was received. After receipt of the e-mail, verify the status of the file through the Transmittal Status Report in the ESS (see chapter 5).
2. Once the transmission is processed, the state will receive an e-mail notification of the processing results.

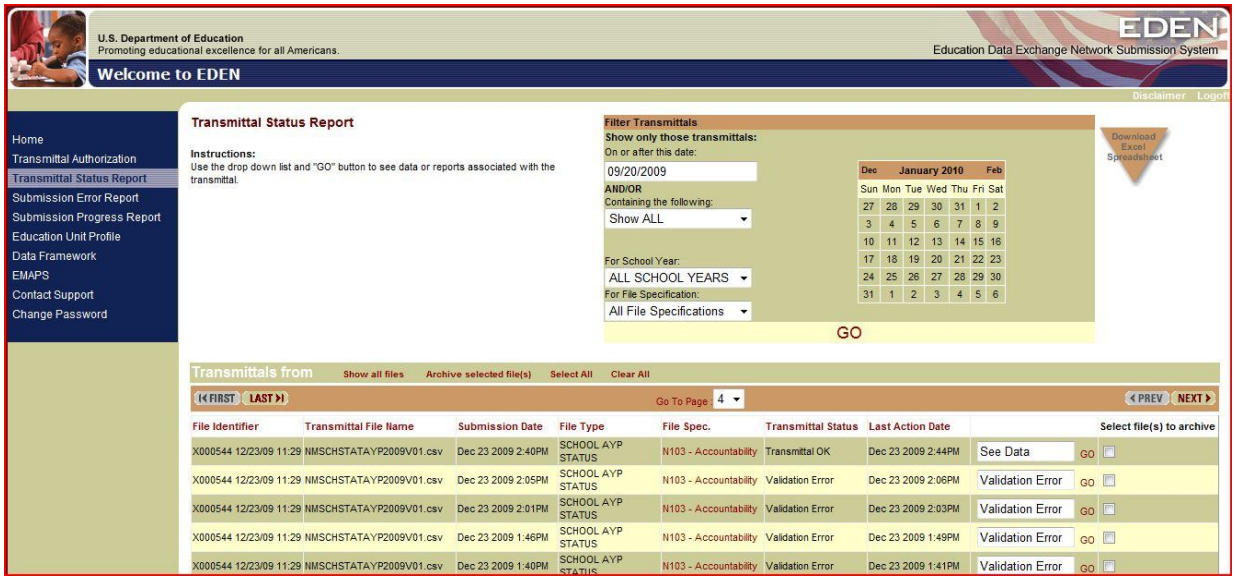
NOTE: It is possible that a "received" e-mail may be received after a "processing results" e-mail. This may happen with smaller files that process quickly.

5 CHECKING TRANSMITTAL STATUS

The *Transmittal Status Report* allows you to check the success or failure of a transmittal and view additional information about transmittal errors and warnings.

To access the *Transmittal Status Report*, click on the ***Transmittal Status Report*** hyperlink on the Navigation Bar (Figure 5-1). Initially, all transmittals are listed in a table on the lower portion of the page. The table displays the File Identifier, Transmittal File Name, Submission Date, File Type, File Specification Number, Transmittal Status, and Last Action Date for each transmittal. Note: The File Identifier comes from the header row of your file. If you see "Undetermined" in the File Identifier column, it means that the system was unable to parse the header.

Figure 5-1: Transmittal Status Reports



The *Transmittal Status Report* page is divided into three parts. The transmittal report appears at the lower portion of the page. If you do not see it, scroll down. In the upper part of the report are the tools to filter which transmittals appear in the report and to download the report to Excel. The sections that follow describe how to navigate the report and the various functions available to the user.

5.1 Report Navigation

This section describes how to navigate within the transmittal status report.

5.1.1 Page Navigation

There are two ways to navigate a multi-page list of transmittals. Both use the navigation buttons on the report navigation bar. The report navigation bar is located at the top of the page between the list functions (***Show All Files***, ***Archive Selected Files***, etc.) and the report column headings. A second report navigation bar is located at the bottom of the page.

On the left side of the navigation bar, ***FIRST*** and ***LAST*** buttons are available. On the right side of the report navigation bar, ***PREV*** and ***NEXT*** buttons are available. If the button is enabled, it will be green. If it is not enabled, it will be gray, meaning there is no ***NEXT*** or ***PREV*** page. If both buttons are grey, there is only a single page for the report. The ***FIRST*** button is not enabled if the first page of the report is being displayed; the ***LAST*** button is not enabled if the last page of the report is being displayed. These buttons will display the first or last page in the report as appropriate.

The second way to navigate within the list of transmittals is to use the ***Go To Page*** feature. With multiple pages, in the middle of the navigation bar is a number with a drop-down list indicating which page of the report is being displayed. Using the drop-down will display the total number of pages in the report. You can select any specific page number in the report by highlighting and clicking a page number, then clicking the ***Go To Page*** hyperlink to the left of the page number.

5.1.2 Sorting the Transmittal Status Report

The column headings in the Transmittal Status Report are self-explanatory. Column headings are highlighted when the cursor is placed over them. When a highlighted column heading is clicked, the data in the column are sorted. A second click reverses the sort order.

5.2 Report Functions

5.2.1 Download to Excel

To download the report data to an Excel workbook, click on the inverted triangle to the right of the calendar. The triangle is labeled with the words ***Download Excel Spreadsheet***. If the data in the report has been filtered, the Excel spreadsheet will only contain the filtered data shown on that page.

5.2.2 Filter Reports

When accessing the Transmittal Status Report, the transmittals included in the report can be filtered by Submission Date and/or Transmittal Status. To filter the transmittals into more manageable groups, use the ***Filter Transmittals*** section at the upper-right side of the page.

- Filtering by date will display only those transmittals submitted from the selected date forward. To filter by date, enter a date, or select one from the calendar.
- Filtering by school year limits the list of transmittals to only those submitted for a particular school year. To filter by school year, select a school year from the drop-down list.
- Filtering by transmittal status limits the list of transmittals to only those with a specific transmittal status. To filter by status, select a specific transmission status from the drop-down list (Figure 5.2). See section 5.3 for definitions and functions associated with specific statuses.
- Filtering by file specification will display files by file number, at every level a given file was submitted. Filtering by file specification is no longer a drop down menu. There is now a list box that users may scroll through. Multiple file specifications can be chosen. In order to select multiple file specifications hold the “Control” Key while making selections. This filter can be combined with any of the other three filters. Please see figure 5-2 for the functionality.

Figure 5-2

After selecting a date, school year, transmittal status, and/or file specification filter, click on the ***GO*** hyperlink under the calendar. Clicking ***GO*** displays the filtered list of transmittals. Although the page may not appear to change, scroll down to see the report you requested. If different filtering is desired, change the parameters at the top of the page and click ***GO*** again.

Note: There are two ***GO*** hyperlinks on this page: one for the ***Filter Transmittals*** section, and the other at the end of each row of the list of transmittals. For more information about ***GO*** the link on the transmittals list, see section 5.3.2.

Figure 5-3: Transmittal Status Filter

5.2.3 Additional Report Functions

The ***Transmittal Status Report*** has four functions that can be highlighted and performed: These functions are shown on the bar at the top of the report.

- ***Show all files:*** Displays all files that meet the filter criteria including previously archived files.
- ***Archive selected file(s)***: Removes the selected files from the display. Files are selected by using the "Select All" function or by checking an individual file's "Select File(s) to Archive" box – the right-most column of the list.
- ***Select All***: Checks the "Select File(s) to Archive" box for all the files in the filtered list.
- ***Clear All****: Unchecks "Select File(s) to Archive" box for all the files in the filtered list.*

5.3 Transmittal Status

The status of each transmittal is displayed in the Transmittal Status column of the *Transmittal Status Report*. (Figure 5-3). Many of the transmittal status values reflect the results of the format and validation edits that take place when the file is first submitted to ESS. This section describes the possible transmittal statuses that may appear in this column. This section also includes a description of the error reports associated with these statuses. Note that the system performs additional edit checks after the file is accepted into the database. The results of these submission edits are described in section 6.0.

5.3.1 Status Definitions

Within the Transmittal Status Report each transmittal has a status indicating whether the transmittal was successful or whether errors were issued. These statuses are defined below. Some statuses have additional actions that can be initiated. The descriptions below include information about any additional actions associated with a status. To initiate an action, click the ***GO*** hyperlink beneath the action shown in the column to the right of Last Action Date. If the ***GO*** hyperlink is not highlighted, then no action can be invoked. Section 5.3.2 describes the reports associated with some of these actions.

- **Received:** A Received status indicates that the transmittal has been received but has not yet been processed. When a transmittal is in a Received status, no further information for the transmittal is available. If a transmittal is in a Received status for more than 24 hours, you should contact the Partner Support Center.
- **Format Error:** A Format Error is issued when there is a fundamental problem with the transmittal and the software is unable to process the submitted file any further. For example, Format Errors will occur if a delimited file does not have the correct number of delimiters, or an incorrect file extension is used in the file name. For more information about the format errors, view the Format Error Report by clicking the ***GO*** hyperlink in the column to the right of Last Action Date. Format errors are the most serious error type and prevent any further processing of the file. Note that format errors must be corrected and the file resubmitted before the file can be loaded into the staging database. See section 5.3.1 for more information about the Format Error Report.
- **Validation Error:** Validation Errors are issued when a data field fails a validation edit. For example, an invalid permitted value will cause a validation error. Validation Errors are also issued when a data element value is determined to be inconsistent with other data within the referenced transmittal file. For example, a Validation Error is issued if the sum of male and female students = 200 and the total students = 150. Validation edits are performed once there are no format errors. To view the Validation Errors Report, highlight and click on the ***GO*** hyperlink. Note that validation errors must be corrected and the file resubmitted before the file can be loaded into the staging database. See section 5.3.2 for more information about the Validation Error Report.
- **Database Exception:** A Database Exception is an unexpected error. If a Database Exception occurs, report the instance to the Partner Support Center.
- **Transmittal OK:** A Transmittal OK status indicates that the data for the transmittal has been accepted into the Staging Database. You can review the data for any transmittal that has been accepted into the Staging Database. Click on the ***GO*** hyperlink below the ***See Data*** window.
- **Replaced**: A status of Replaced indicates that the transmittal shown has been replaced by a subsequent transmittal.

- **No Changes:** A status of No Changes indicates that a transmittal was submitted that resulted in no changes to the data in the Staging Database.

5.3.2 Transmittal Error Reports

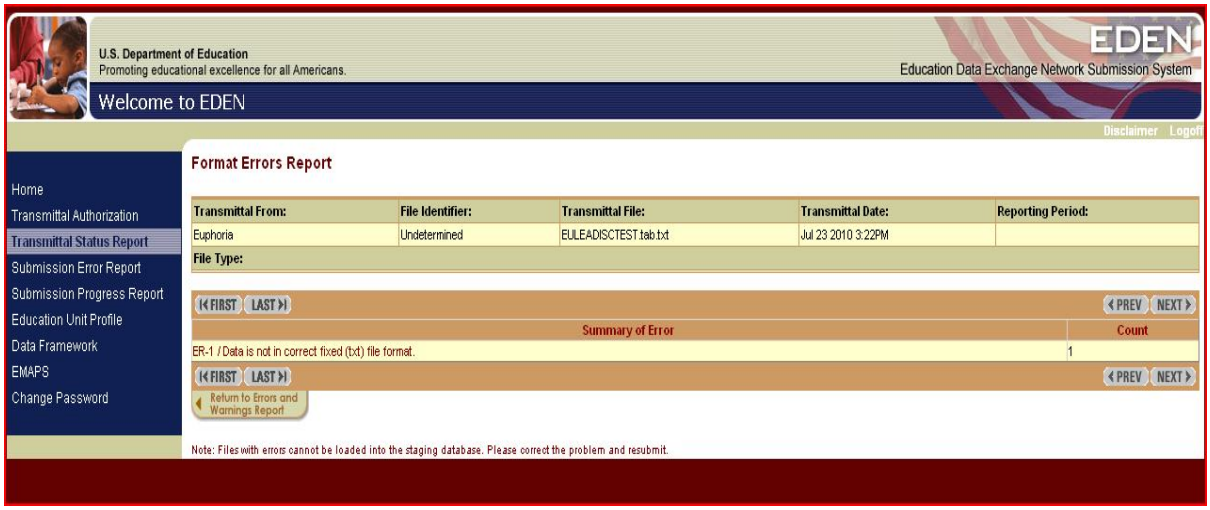
This section describes the error reports generated when there are transmittal errors. Transmittal Error Reports are available for transmittals with format and validation edit errors. They are accessed from the ***Transmittal Status Report*** by clicking the ***GO*** hyperlink for a specific transmittal.

Errors identified after a file is in the staging database (*submission errors*) are not identified in the transmittal error reports. These errors appear on the *Submission Error Report*. *Submission errors* also need to be corrected; however they do not stop the process of loading the file into the staging database. See section 6.0 for more information on the *Submission Error Report*.

5.3.2.1 Format Error Reports

A *Format Error* is issued when there is either a file format problem, or a data type mismatch is detected with the referenced transmittal file. The problem must be corrected and the file resubmitted before the file can be loaded into the staging database. *The Format Error Report* (Figure 5-4) is used to identify the format problem. A single transmittal may have more than one *Format Error*. However, because file processing stops when the first *Format Error* is detected, the *Format Error* Report will show only one *Format Error* at a time. The transmittal will continue to be rejected until all *Format Errors* are corrected. If a transmittal contains a format error, it should be reviewed for additional format errors before it is retransmitted.

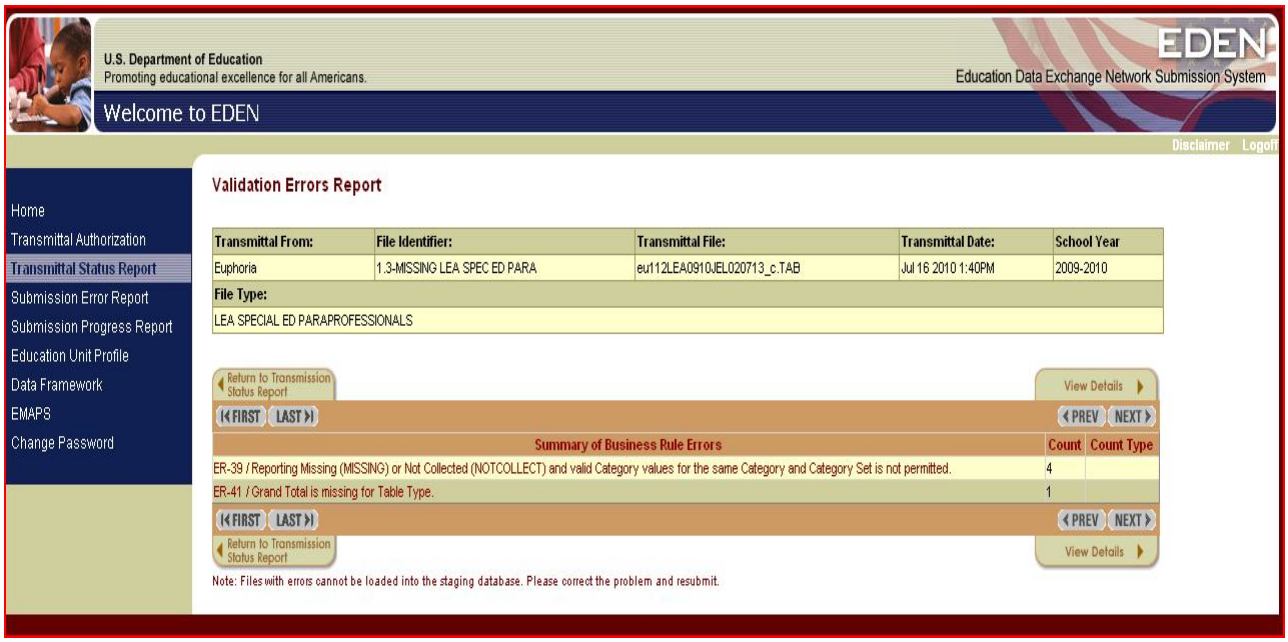
Figure 5-4: Format Errors Report



5.3.2.2 Validation Errors Report

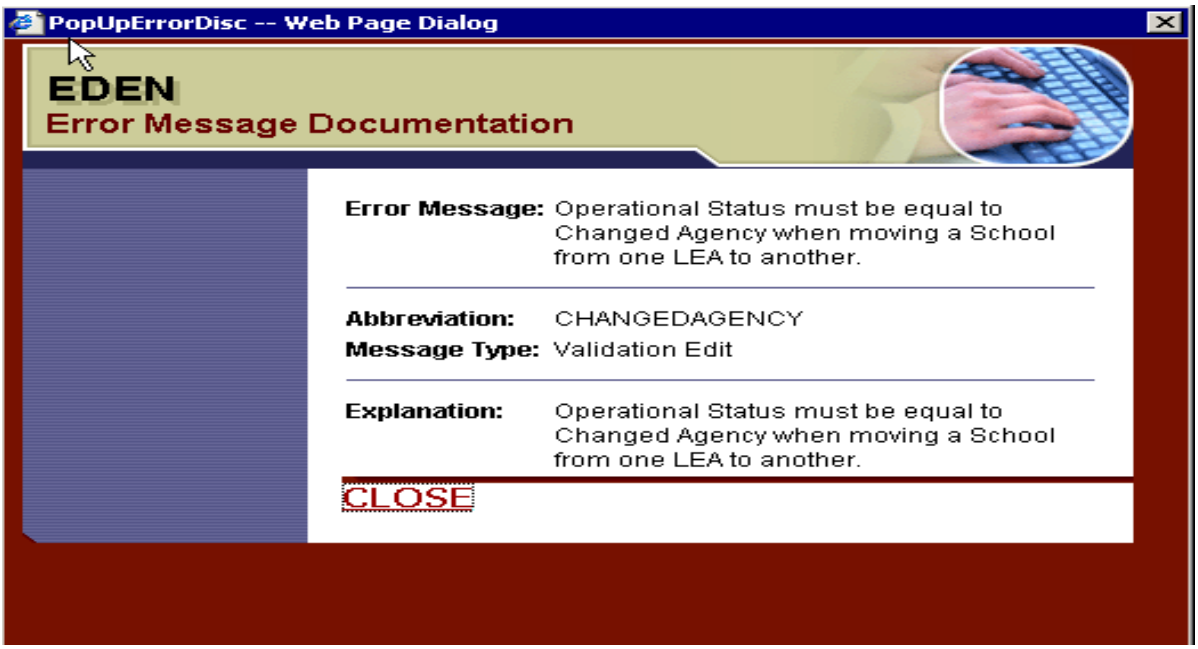
A *Validation Error* is issued when a data field fails a validation edit. Validation edits are performed once there are no format errors. Validation errors must be corrected and the file resubmitted before the file can be loaded into the staging database. The Validation Error Report identifies the failed edits. The first page of the *Validation Errors Report* (Figure 5-5) displays a summary count for each Error Type (i.e., the number of times the specific error type has occurred for the transmittal) triggered by the transmittal.

Figure 5-5: Validation Errors Report



To view a more detailed explanation of an error, highlight and click on the description of the error. This will display an *Error Message Documentation pop-up window*, as shown in Figure 5-6. Click the **CLOSE** button to close the pop-up window. More detailed error explanations, including potential error causes and error resolution, are available in the ED*Facts Business* Rules Guide available on the ED*Facts* Web site.

Figure 5-6: Error Message Documentation



Unlike *Format Errors*, all *Validation Errors* are identified when the transmittal is processed. However, there is a maximum number (1,000) of *Validation Errors* that can be processed for a single transmittal. Once the threshold is reached for a transmittal, processing for that transmittal is terminated.

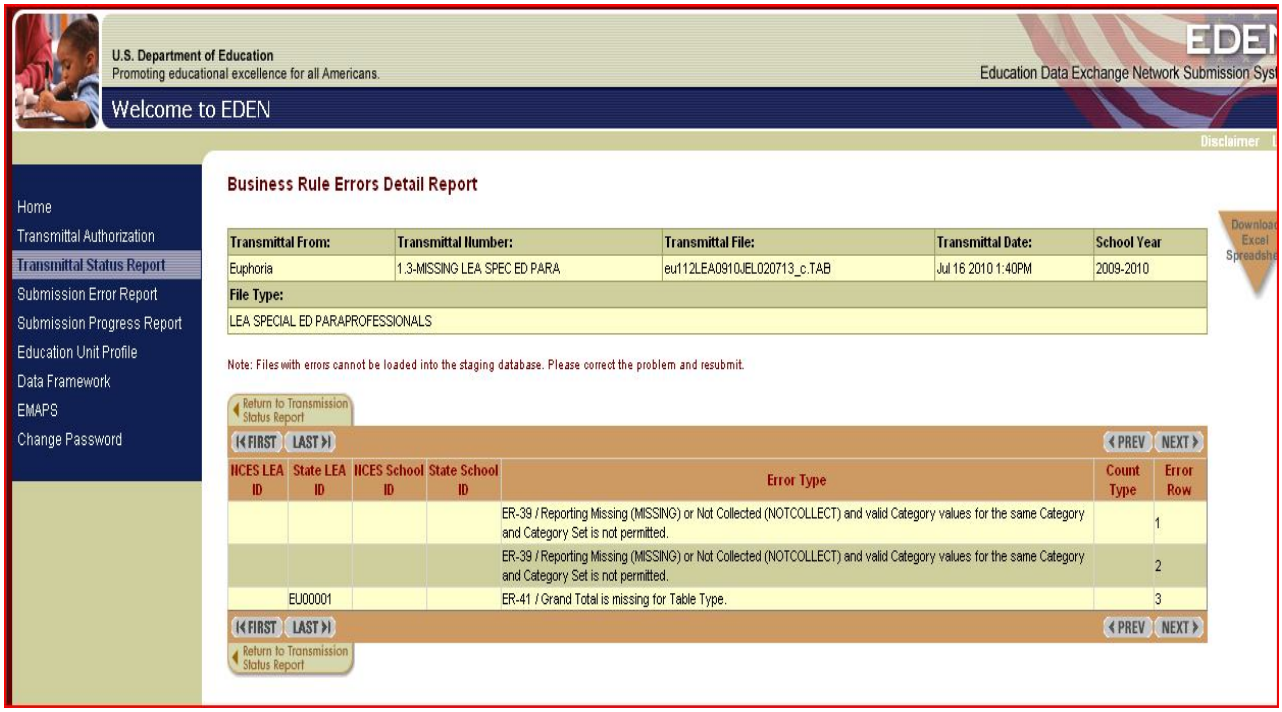
There are two tabs at the bottom of the *Format Errors Report:* the ***Return to Transmission Status Report*** tab on the left and the ***View Details*** tab on the right.

> ***Return to Transmission Status Report*** takes the user back to the Transmittal Status Reports (Figure 5-7). The browser **BACK** button also will eventually (depending on how many pages in the *Validation Errors Summary Report* detail list you have gone through) return you back to the *Validation Errors Summary* Report page.
>
> ***View Details*** displays the *Business Rule Errors Detail Report* (Figure 5-6). This report has standard navigation features, and the list of errors may be sorted by highlighting and then clicking on any of the columns in the list. To aid in troubleshooting the cause of a validation error, the type of error, relevant NCES and state IDs, and error row number are listed. The row number indicates the line in the file where the error is located.

A comprehensive list of all business rules is provided in a separate document, **ED*Facts* Business Rules Guide**.

Note: The Error Row column of the detailed report does not apply to XML files.

Figure 5-7: Business Rule Errors Detail Report



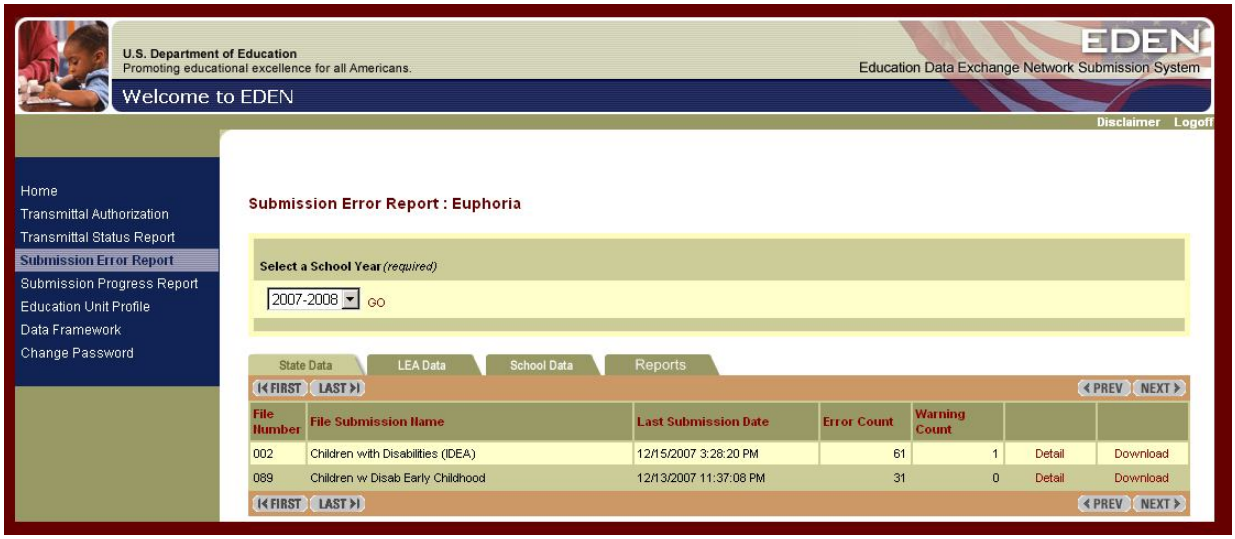
6 SUBMISSION ERROR REPORT

The ***Submission Error Report*** provides access to the results of submission edits and warnings. Submission edits and warnings ensure that the data meet or exceed an acceptable level of reasonability by checking the values entered in a field against other similar values in the same file or across files. If a discrepancy is found (i.e., a value falls outside of the acceptable range), a submission error or warning is issued. Unlike format and validation edits, submission edits and warnings are applied to the data after they are in the staging database.

To access the ***Submission Error Report***, click the ***Submission Error Report*** hyperlink on the Navigation Bar (Figure 6-1). Initially, the report displays state files with submission errors or warnings for the most recent school year. If there are no such files, the Submission Error Report shows no files. This is different from the ***Transmittal Status report***, which shows the transmittal status for all files. Files with errors and warnings for previous school years can be viewed by changing the school year in the drop-down list at the top left corner of the report. View the same information for LEA and school files with submission errors or warnings by selecting the appropriate tab at the top of the table (LEA Data or School Data instead of State Data). Section 6.2 discusses the information available behind these tabs.

Note: The information behind the Reports tab is different. The Reports tab provides access to match edit reports. Section 6.3 discusses the information available for reports.

Figure 6-1: Submission Error Report



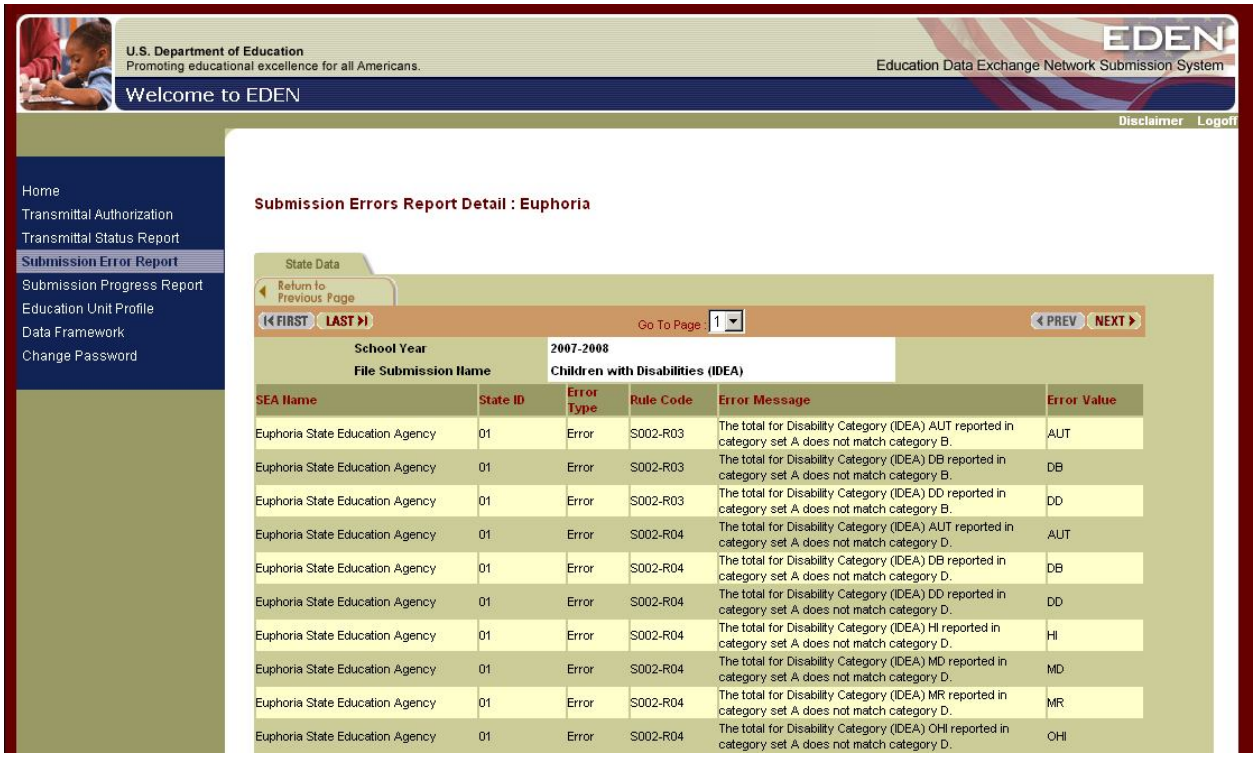
6.1 The Data Tabs

From the ***State Data*** tab, the ***LEA Data*** Tab, or the ***School Data*** Tab, the EDFacts Coordinator has access to detailed information about the errors and warning in each of the files displayed. Behind these tabs is a table listing all the files with errors or warnings. For each file, the table displays the File Submission Name, Specification Number, Last Submission Date (the date and time of the last submission of that file loaded into ESS), Error Count, and Warning Count. The table also includes a ***Detail*** hyperlink and ***Download*** hyperlink for each file. The functioning of these hyperlinks is described below.

6.1.1 Details

Clicking on the ***Detail*** hyperlink for a file opens the *Submission Error Report Detail* page (Figure 6-2). The *Submission Error Report Detail* page allows the user to view the specific submission errors and warning triggered by a file. It lists the ***Rule Code***, ***Error Message***, and ***Error Value*** for each error or warning triggered. The ***Rule Code*** allows the user to reference the rule in the Business Rules Guide. The error message provides a brief description of the problem. The ***Error Value*** identifies the specific application of the rule.

Figure 6-2: Submission Error Report Details Page



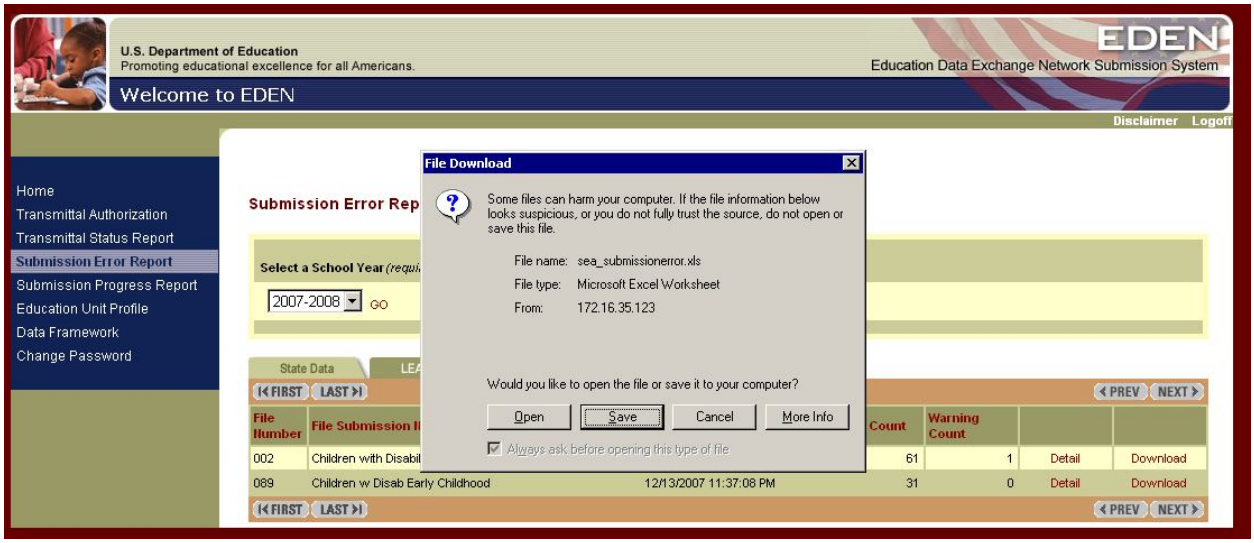
SEA Name	State ID	Error Type	Rule Code	Error Message	Error Value
Euphoria State Education Agency	01	Error	S002-R03	The total for Disability Category (IDEA) AUT reported in category set A does not match category B.	AUT
Euphoria State Education Agency	01	Error	S002-R03	The total for Disability Category (IDEA) DB reported in category set A does not match category B.	DB
Euphoria State Education Agency	01	Error	S002-R03	The total for Disability Category (IDEA) DD reported in category set A does not match category B.	DD
Euphoria State Education Agency	01	Error	S002-R04	The total for Disability Category (IDEA) AUT reported in category set A does not match category D.	AUT
Euphoria State Education Agency	01	Error	S002-R04	The total for Disability Category (IDEA) DB reported in category set A does not match category D.	DB
Euphoria State Education Agency	01	Error	S002-R04	The total for Disability Category (IDEA) DD reported in category set A does not match category D.	DD
Euphoria State Education Agency	01	Error	S002-R04	The total for Disability Category (IDEA) HI reported in category set A does not match category D.	HI
Euphoria State Education Agency	01	Error	S002-R04	The total for Disability Category (IDEA) MD reported in category set A does not match category D.	MD
Euphoria State Education Agency	01	Error	S002-R04	The total for Disability Category (IDEA) MR reported in category set A does not match category D.	MR
Euphoria State Education Agency	01	Error	S002-R04	The total for Disability Category (IDEA) OHI reported in category set A does not match category D.	OHI

Remember: The default *Submission Error Report* displays at the State Data level. Make sure to review the submission error reports for the other reporting levels.

6.1.2 Download

Clicking the ***Download*** hyperlink for a file opens the ***Submission Error Report File Download*** pop-up box (Figure 6-3). This pop-up box allows the user to open and view or save the Submission Error Report Detail as a Comma Separated Value (CSV) file. CSV files can be read by Excel and other spreadsheet software. Just follow the directions from the pop-up box.

Figure 6-3: Submission Error Report Download Pop-up Box



Before downloading the error report, first make sure you selected the appropriate:

- ***Education level tab and***
- ***School year.***

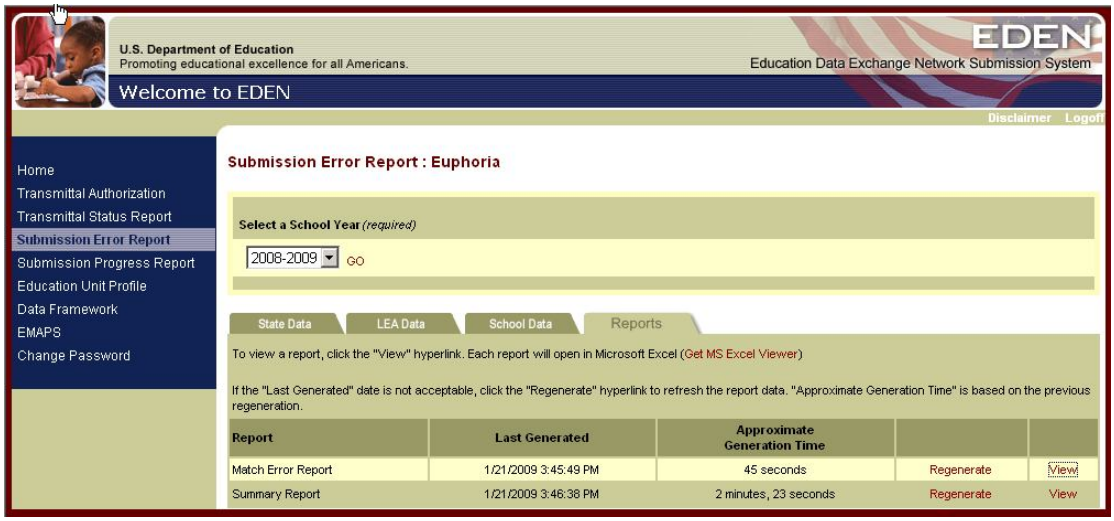
6.2 The Reports Tab

Behind the ***Reports*** tab is a table of the reports available (Figure 6-4). Currently, the table includes links to display the Match Error Report and Summary Report.

- The Match Error Report shows the errors identified when the current school year's directory data (universe) are compared with the previous year's directory data. For example, it identifies schools with NCES School IDs that are different from the previous year's ID.
- The Summary Report shows all of the Common Core of Data (CCD) information your state has submitted, summarized in various ways. The report is not complete until all data is submitted, but preliminary pieces of information, such as Membership and Staff FTE, are available as soon as they are submitted to ESS. The Summary Report is available for you to review the data submitted for consistency and data quality.

The ***Reports*** tab displays the date the report was generated and the amount of time it took to generate the report. There are also two hyperlinks for the report which allow the ED*Facts* Coordinator to regenerate the report or to view the report. Each of these functions is described below.

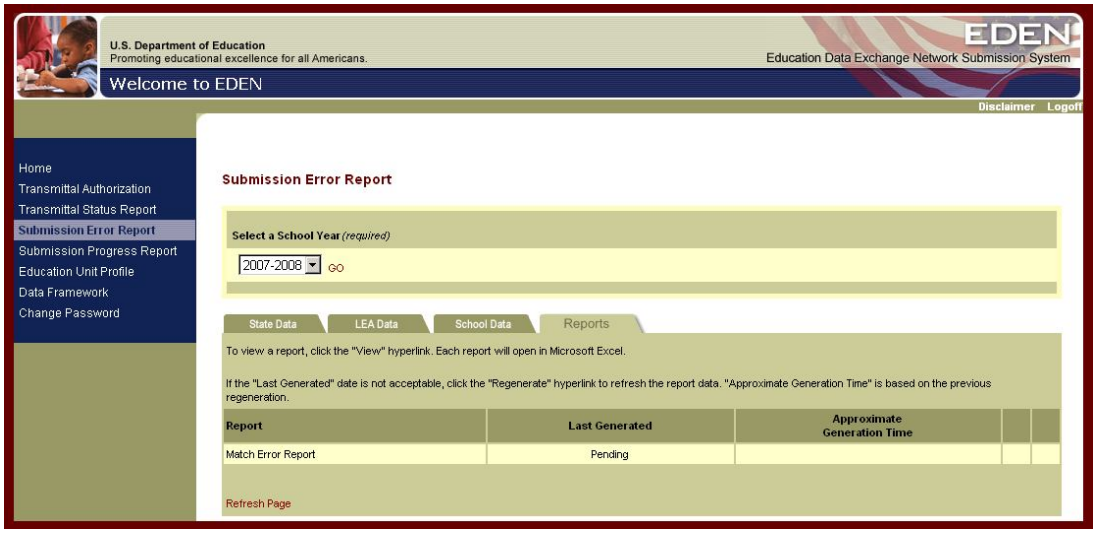
Figure 6-4: Reports



6.2.1 Regenerate

Clicking the ***Regenerate*** hyperlink allows the user to regenerate the match error reports (Figure 6-5). While the error report is generating, the Last Generated field will change its status to Pending until a new report is available.

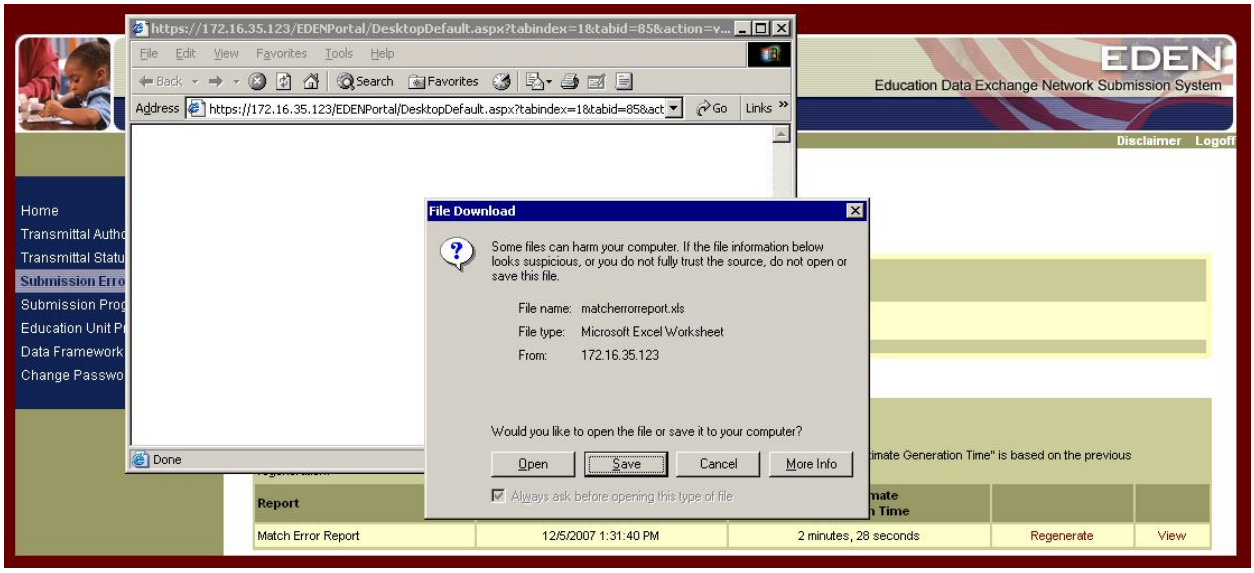
Figure 6-5: Submission Error Report Regenerate Link



6.2.2 View

Clicking the **View** hyperlink displays a pop-up box that will allow you to view the Match or Summary reports, depending on which you choose to open. Viewing the Match report allows you to identify where the directory data has errors. The report opens in Excel. If desired, the user can then save the file (Figure 6-6).

Figure 6-6: Submission Error Report View Link

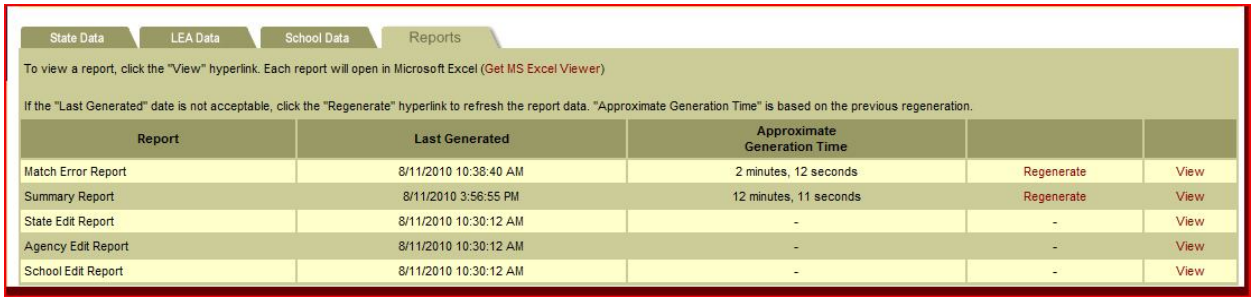


6.2.3 CCD Edit Reports

If your state has no directory match errors but other data has submission errors, you will see three rows below the Summary Report row. These are the State, Agency and School Edit Report rows (Figure 6-7). These reports contain submission errors about CCD data only and should contain the same information as the CCD-related errors found on the respective Submission Error Report tabs (State, LEA, and School Data). These Excel spreadsheets are the CCD Workbooks that were annotated and returned to CCD prior to SY 2009-10.

Please read instructions in these reports carefully.

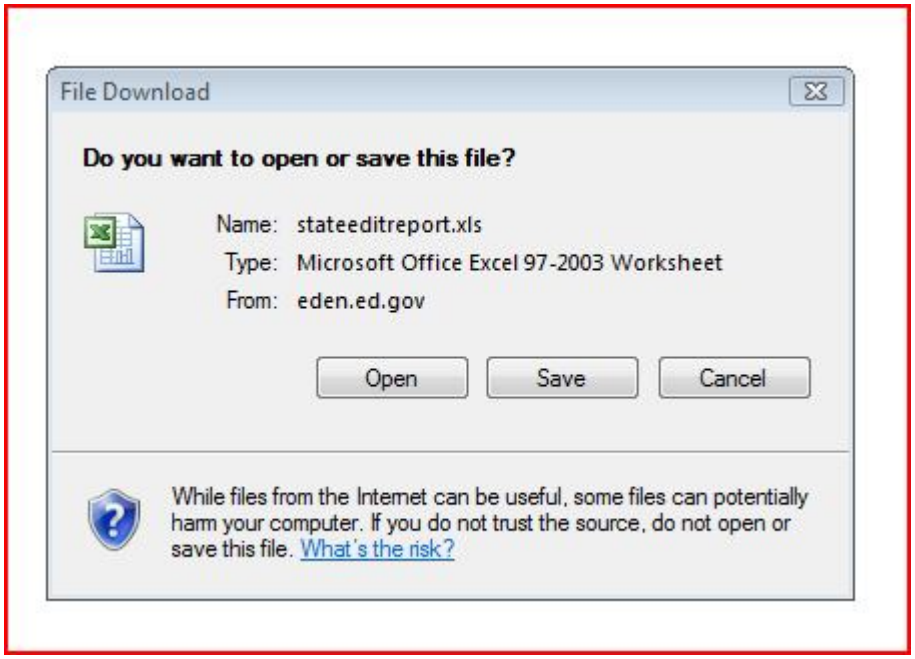
Figure 6-7: CCD Edit Report Rows



Report	Last Generated	Approximate Generation Time		
Match Error Report	8/11/2010 10:38:40 AM	2 minutes, 12 seconds	Regenerate	View
Summary Report	8/11/2010 3:56:55 PM	12 minutes, 11 seconds	Regenerate	View
State Edit Report	8/11/2010 10:30:12 AM	-	-	View
Agency Edit Report	8/11/2010 10:30:12 AM	-	-	View
School Edit Report	8/11/2010 10:30:12 AM	-	-	View

To review any of these reports, click on that row's View link and you will be asked if you want to open or save the MS Excel spreadsheet (Figure 6-8).

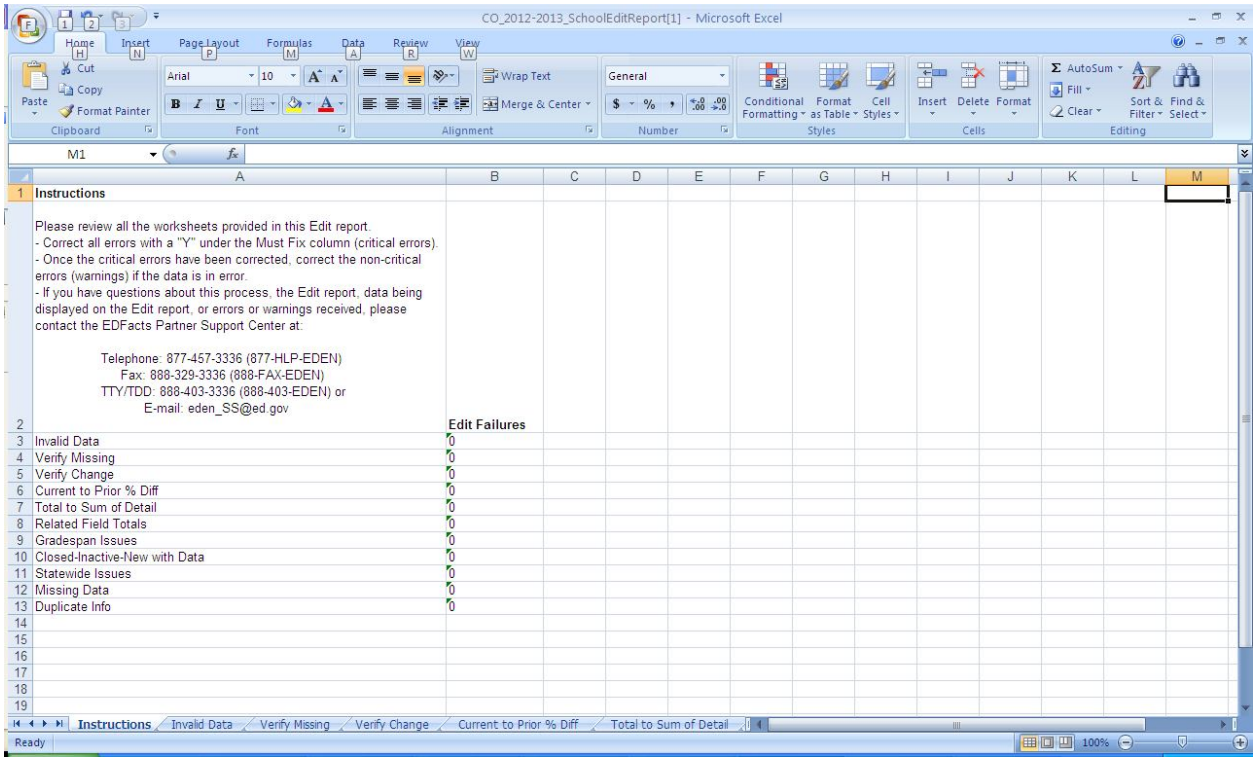
Figure 6-8: Viewing CCD Edit Reports



If you choose Open, a multi-worksheet MS Excel spreadsheet (Figure 6-9) provides you with a summary page (worksheet) and several worksheets with various types of errors in your CCD data. The summary page (Instructions tab) lists which worksheets contain errors and how many errors there are so you only need to review those pages with errors.

Once you have fixed all Match Errors you should review each level (State, Agency and School) of Edit Reports.

Figure 6-9: CCD Edit Reports Content



6.3 Submission Edits Processing Information

Unlike the match error report, the submission edits are processed every few hours, as needed. As a result, the errors and warnings information in the ***Submission Error Report*** may not reflect data in files submitted (or resubmitted) since the end of the previous day. On the day a file is submitted, if it has errors or warnings they may not be reflected on the report until the following day. Similarly, when an error is corrected, it may not be reflected on the report until the following day.

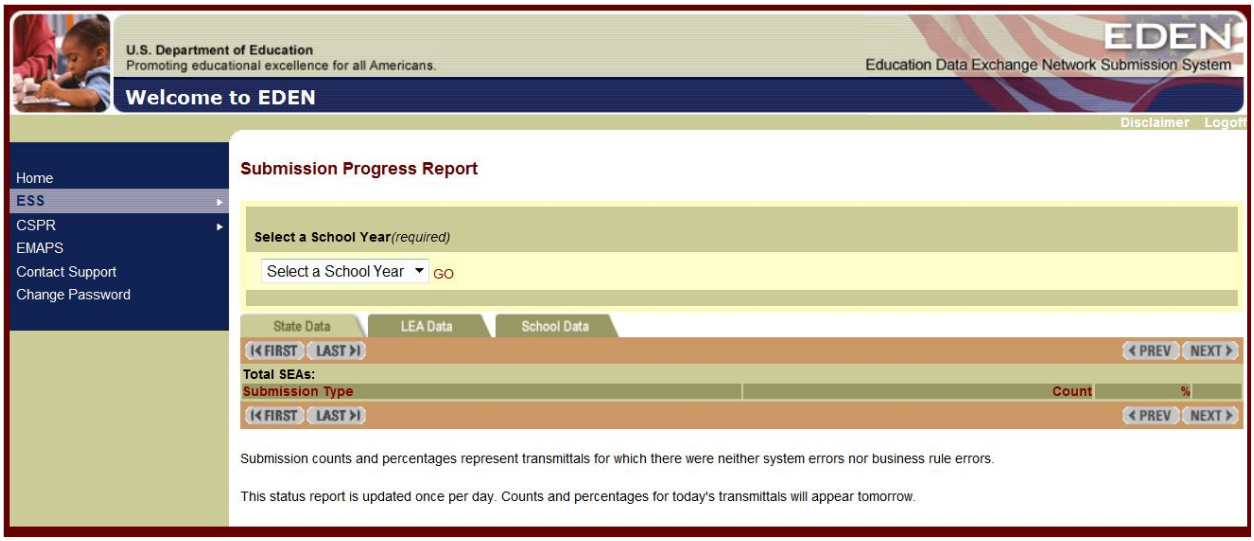
A maximum number of 1,000 errors or warnings can be identified in the course of processing a file. Once 1,000 errors or warnings are identified, further processing of that file will end. For example, if an inappropriate string is included in every record in a file, the processing will stop after 1,000 errors are identified. *The Business Rules Guide* document contains all of the reasonability edits in ESS.

7 SUBMISSION PROGRESS REPORT

This **Submission Progress Report** allows the user to view where a state is in the yearly submission process and approve or hold a submission type for transfer into the data repository. The status of submissions can be viewed by State, LEA or School level.

To access the ***Submission Progress Report***, click the ***Submission Progress Report*** hyperlink on the Navigation Bar (Figure 7-1). Initially, the report displays the submission progress for state-level data, but no submission status information is displayed until a school year is selected from the drop-down list. To view the submission progress for LEA and school data, select the appropriate tab at the top of the table (***LEA Data*** or ***School Data*** instead of ***State Data***) and follow the same instructions.

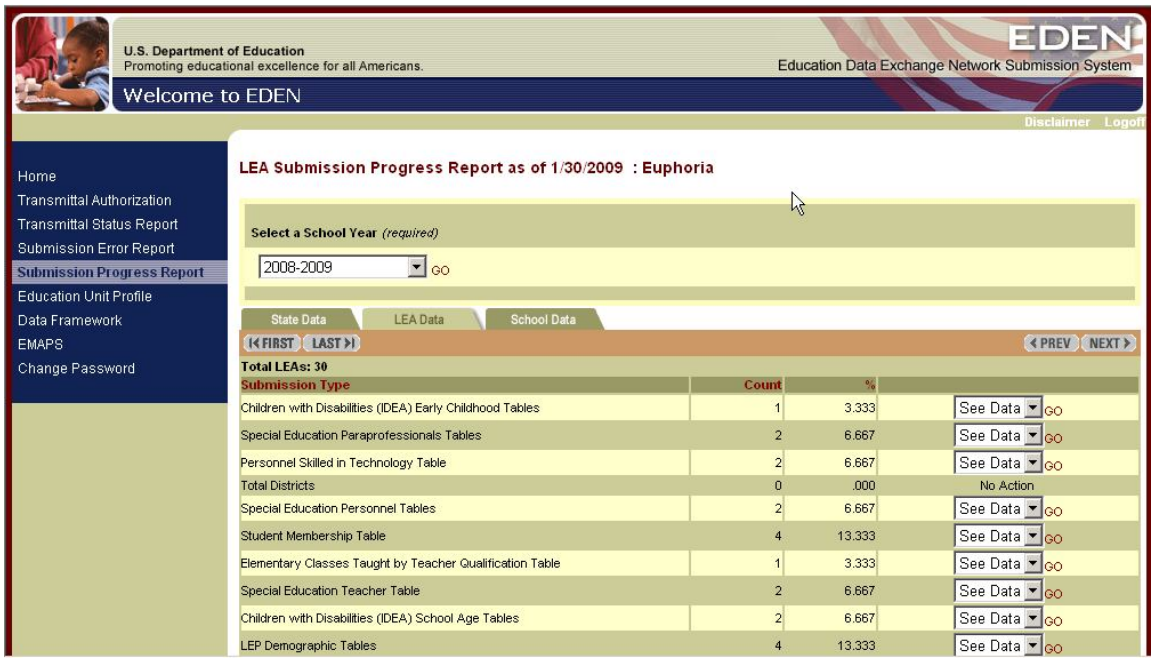
Figure 7-1: State Submission Progress



7.1 Submission Progress Report

Once on the Submission Progress Report page for the desired education unit type (SEA, LEA, School), select the desired School Year from the drop-down list provided and click ***GO***. This will display a report of the submission status for each submission type (Figure 7-2). The submission type corresponds with the table in the ED*Facts* database where the data are stored. If you do not see the report, scroll down to view them.

Figure 7-2: Submission Progress Report (LEA)



Navigation buttons (i.e., ***FIRST/LAST***, ***PREV/NEXT***) are available at the top of the report (they appear below the education level tabs). These navigation buttons operate the same as on the Transmittal Status Report.

The contents of the report can be sorted by the contents of each column. To sort the report, click on a column heading. Clicking once will sort the data in ascending sequence; clicking a second time will sort the data in descending sequence.

Displayed in the top left corner of the report is the total number of the education units selected. At the SEA level, this count should always be one. Figure 7-2 shows the LEA submission progress report. It shows that there are 30 LEAs in the state of Euphoria. For each submission type, the report also shows how many education units (SEA, LEAs, or schools, as appropriate) have been submitted to the staging database.

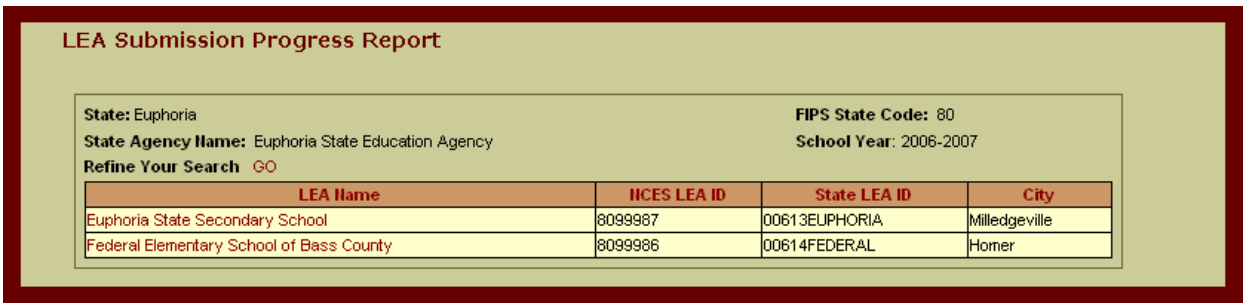
Use the tabs at the top of the report to view submission status for different education unit levels (Click on the ***State Data***, ***LEA Data***, or ***School Data)***.

7.1.1 See Data

If data is available for a submission type, ***See Data*** is available from drop-down list to the right of the Status column. Click the ***GO*** link to activate the ***See Data*** action. The instructions describe the steps involved in accessing data and require the user to select the specific education unit of interest and the data group, data category and permitted value of the data before any data are displayed.

1.* Select the *Education Unit: Clicking ***GO*** on the ***Submission Progress Report*** brings up a pop-up window with the names of all the education units with data for that reporting level (State Agencies, LEAs, or schools). Figure 7-3 shows the two LEAs in Euphoria that have data. Click on the name of an education unit to see its data.

Figure 7-3: List of Education Units (LEAs)


LEA Submission Progress Report

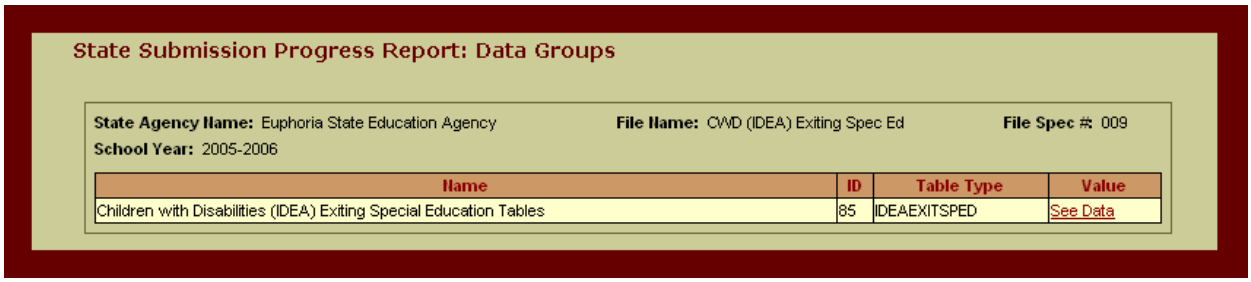
State: Euphoria **FIPS State Code:** 80
State Agency Name: Euphoria State Education Agency **School Year**: 2006-2007
Refine Your Search GO

LEA Name	NCES LEA ID	State LEA ID	City
Euphoria State Secondary School	8099987	00613EUPHORIA	Milledgeville
Federal Elementary School of Bass County	8099986	00614FEDERAL	Homer

Note: Use the ***Back*** function to move to a previous window in the pop-up frame. If there is no ***Back*** function provided, right click and then use the ***Back*** function to move back to a previous window in the pop-up frame. In addition to going backwards to a previous window, right click will also allow you to move forward.

2. Select a Data Group. After clicking ***GO*** for a particular education unit, the next pop-up window lists the data groups available for the submission type and education unit selected (Figure 7-4). This window displays the data group name, ID and file specification numbers.

Figure 7-4: State Data Submission Progress Report: Data Groups


State Submission Progress Report: Data Groups

State Agency Name: Euphoria State Education Agency **File Name:** CWD (IDEA) Exiting Spec Ed **File Spec #:** 009
School Year: 2005-2006

Name	ID	Table Type	Value
Children with Disabilities (IDEA) Exiting Special Education Tables	85	IDEAEXITSPED	See Data

3. **Select a Category Set.** To access data for this data group, click the ***See Data*** link in the Value column. The next screen lists the Category Sets, Subtotals, and Total, where applicable, associated with the selected data group (Figure 7-5). Subtotals and the Total are listed as Type “Total”, while Category Sets are Type “Detail”.

Figure 7-5: State Data Submission Progress Report: Children with Disabilities (IDEA) Exiting Special Education Tables (Category Sets)

State Submission Progress Report: Children with Disabilities (IDEA) Exiting Special Education Tables

State Agency Name: Euphoria State Education Agency **File Name:** CWD (IDEA) Exiting Spec Ed **File Spec #:** 009
School Year: 2005-2006

CategorySet	Type	
Age (Exiting Special Ed), Basis of Exit, Disability Category (IDEA)	Detail	See Data
Basis of Exit, Gender	Detail	See Data
Basis of Exit, LEP Status (Both)	Detail	See Data
Basis of Exit, Race/Ethnicity	Detail	See Data
Age (Exiting Special Ed), Basis of Exit	Total	See Data
Total for Children with Disabilities (IDEA) Exiting Special Education Tables	Total	See Data

4. View Data. Clicking the ***See Data*** link from a category sets page lists, in alphabetical order, the permitted values for the selected category set. Clicking on the ***See Data*** link for a category set (on the right hand side of the screen) allows you to view the results of the submissions that are currently available (Figure 7.6).

Figure 7-6: State Data Submission Progress Report (Permitted Values)

State Submission Progress Report

State: Euphoria **School Year:** 2005-2006
State Agency Name: Euphoria State Education Agency **State Agency Number:** 01 **FIPS State Code:** 80

Age	Basis of Exit	Disability Category	StudentCount	Percentage
Age 14	Received a certificate	Autism	100	24.39%
Age 15	Graduated with regular high school diploma	Deaf-blindness	100	24.39%
Age 18	Died	Hearing impairment	10	2.44%
Age 21	Transfer to regular education	Orthopedic impairment	100	24.39%
22 years old and older	Received a certificate	Specific learning disability	100	24.39%

8 EDUCATION UNIT PROFILE

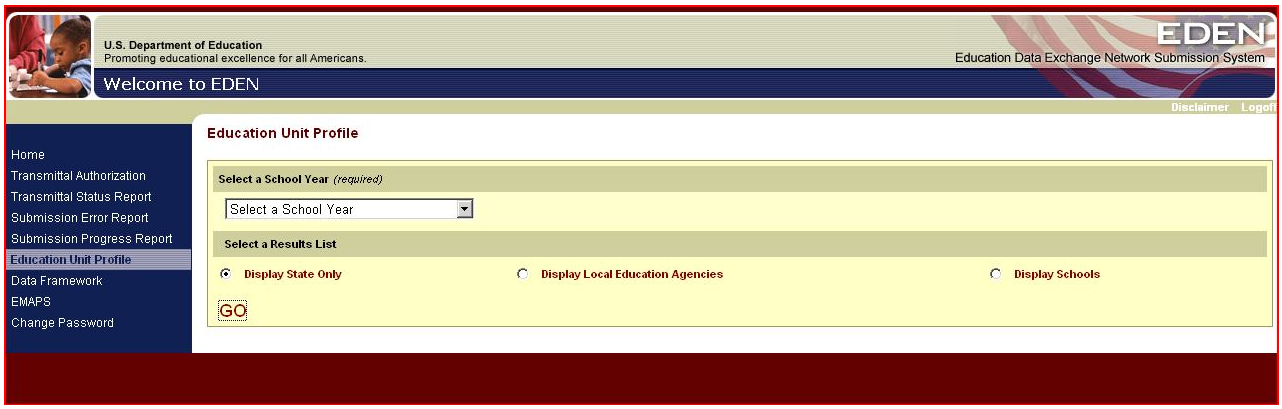
8.1 Purpose of the Education Unit Profile

The Education Unit Profile allows you to view and verify State, LEA, and School level data.

To invoke the Education Unit (EU) Profile, click on the ***Education Unit Profile*** hyperlink from the Navigation Bar. This will display the page shown in Figure 8-1.

8.2 Accessing State Data

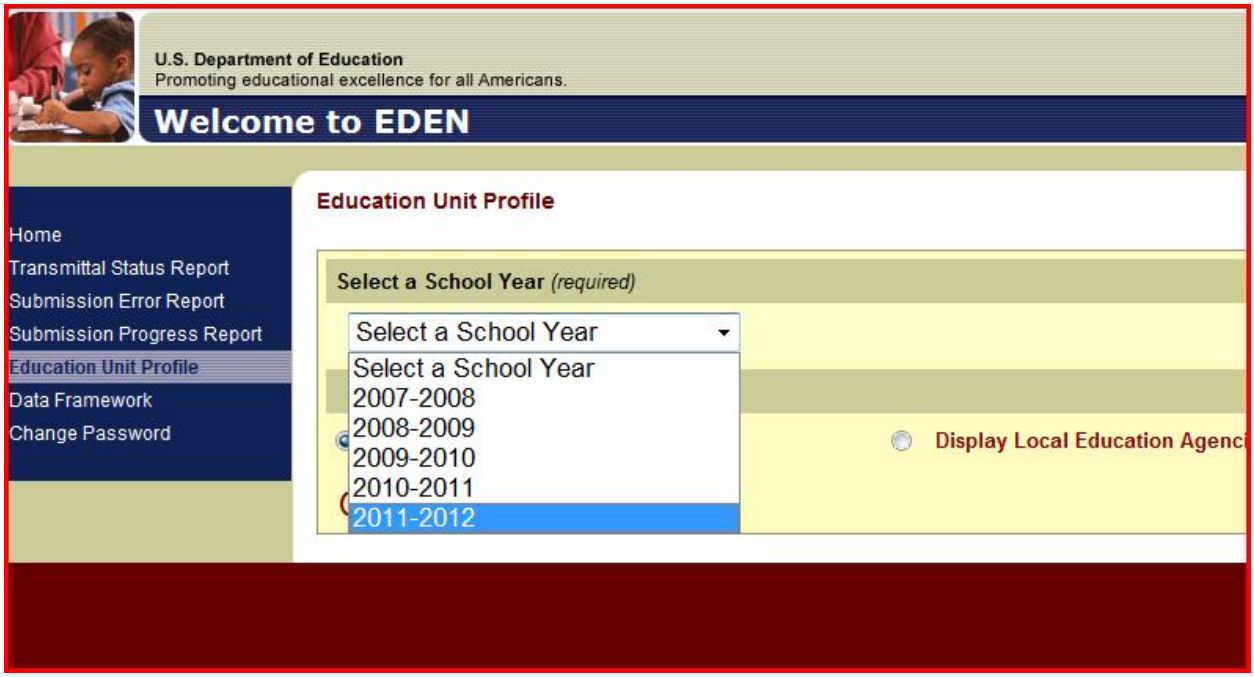
Figure 8-1: Education Unit Profile



To access state level data, mark the ***Display State Only*** button at the bottom of the page, under the Select a Results List area. Note that ***Display State Only*** is the default EU level.

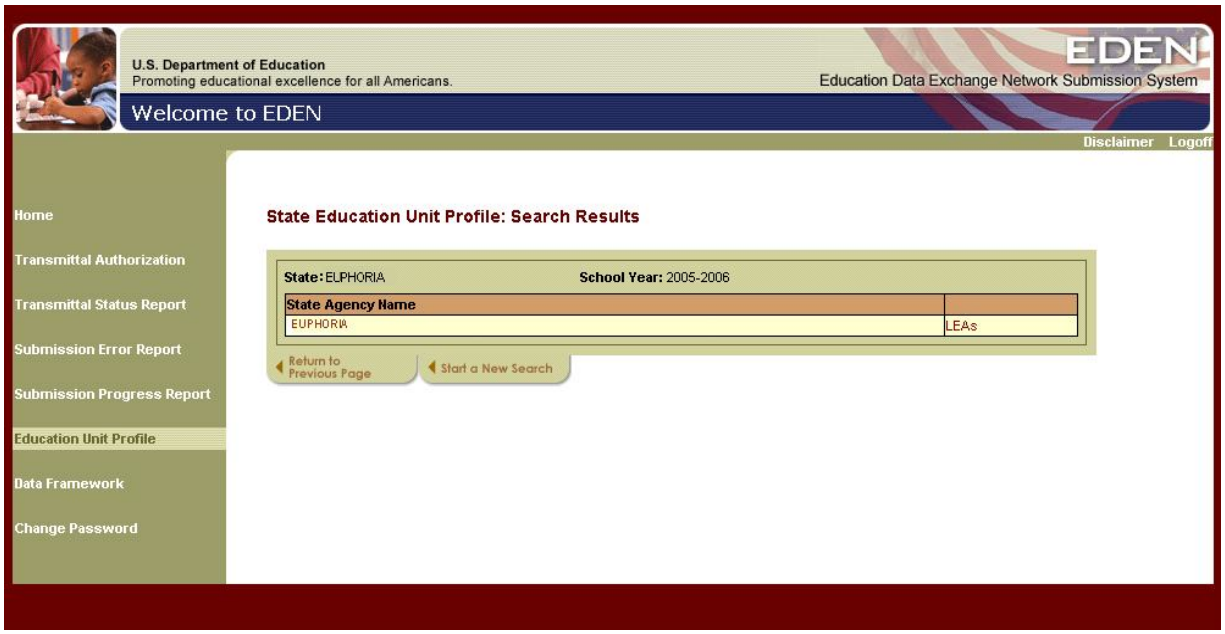
You also must select a school year from the ***Select a School Year*** drop-down list (Figure 8-2) and click ***GO***.

Figure 8-2: Education Unit Profile



After you click ***GO***, the next screen is the State Education Unit Profile: Search Results page (Figure 8-3). Click on the ***State Agency Name*** hyperlink to access your state level data by file submission. Note that at this time, there is only one State Agency in ESS for each state.

Figure 8-3: Education Unit Profile: Search Results

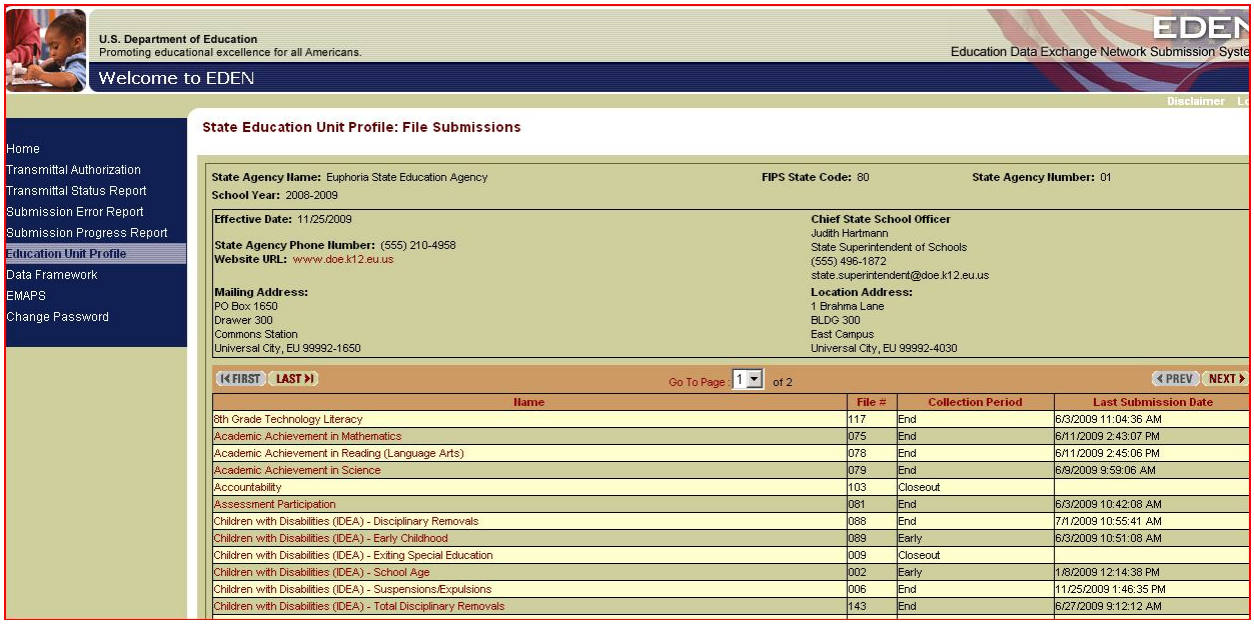


Use the navigation tabs at the bottom of the page to ***Return to Previous Page*** or to ***Start a New Search***. With the exception of the main Education Unit Profile page, these navigation buttons appear at the bottom of all pages.

You can also access your LEA data from the State Education Unit Profile: Search Results page by clicking the ***LEAs*** hyperlink to the right of the SEA name. However, it is recommended that you access LEA data using the ***Display LEAs*** portal on the main Education Unit Profile page. Section 8-3 contains more information about accessing your LEA data.

Clicking on the ***State Agency Name*** hyperlink takes you to the *State Education Unit Profile*: File Submissions page (Figure 8-4). In alphabetical order by name, this page lists all of the files collected by EDFACTS for that school year. It also lists the file number, data collection period, and the date and time of your most recent submission for the selected school year. Clicking on a file heading sorts the list of files by that characteristic.

Figure 8-4: Education Unit Profile: File Submissions



The *State Education Unit Profile*: File Submissions page also displays information about your SEA including its name and address, Chief State School Officer (CSSO) information, Web address, etc. If the effective date was not submitted through an SEA directory submission, the default effective date (10/01/2003) is displayed.

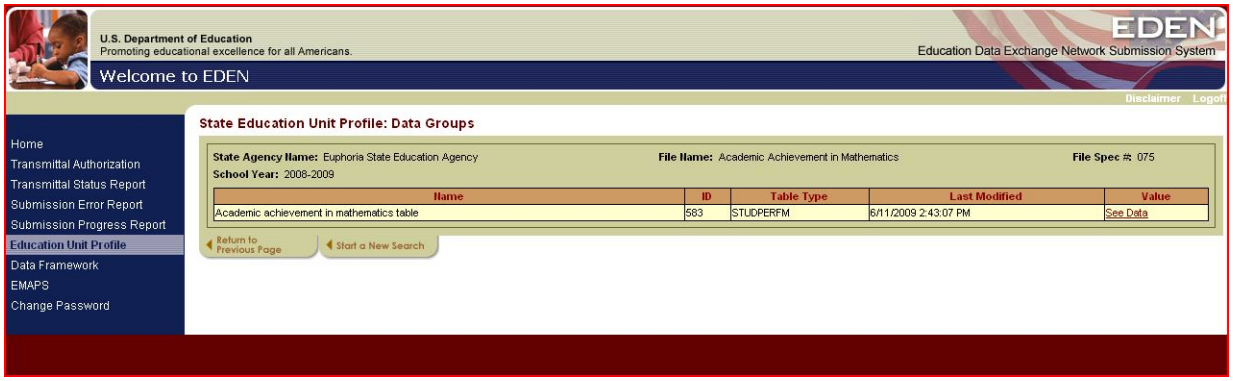
To view your data, click the name of the file you want to access. If the last submission date is blank, no data were submitted and therefore are not available for viewing.

Clicking on the file name takes you to the *State Education Unit Profile*: Data Groups page (Figure 8-5). Information at the top of the page describes the selections you have made so far: your SEA's name, the school year selected, and the name and number of

the file selected. This description is followed by a list of the data groups in the specification for this file, the date and time your data were most recently modified, and the ***See Data*** hyperlink. Click the ***See Data*** hyperlink for the data group you want to view.

You can also access historical information found in the Directory file from the *State Education Unit Profile*: Data Groups page by clicking the ***Directory*** file name. Section 8.5 has more information about accessing historical Directory information.

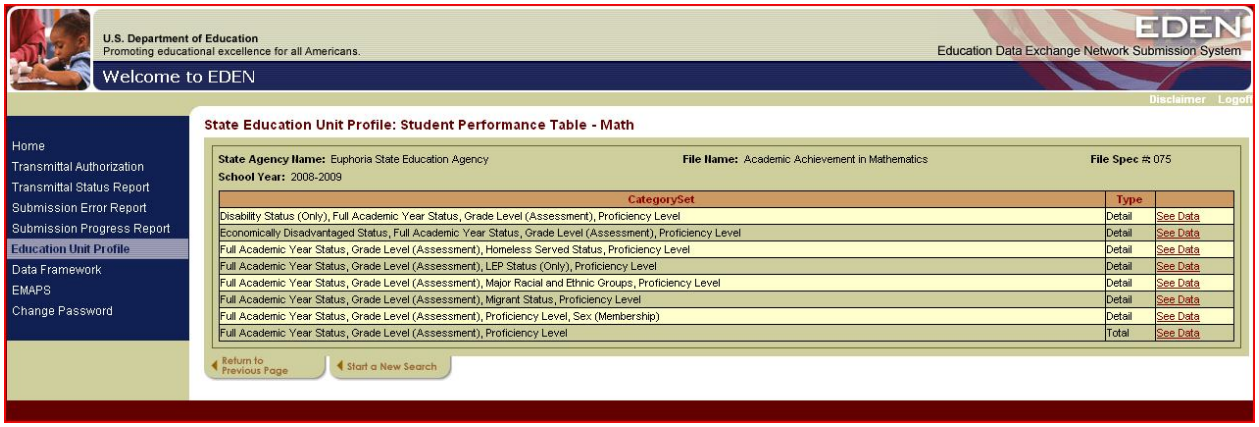
Figure 8-5: Education Unit Profile: Data Groups



Clicking the ***See Data*** hyperlink takes you to an alphabetical list of all the data category sets for the selected data group. Clicking on a file heading sorts the list of files by that characteristic.

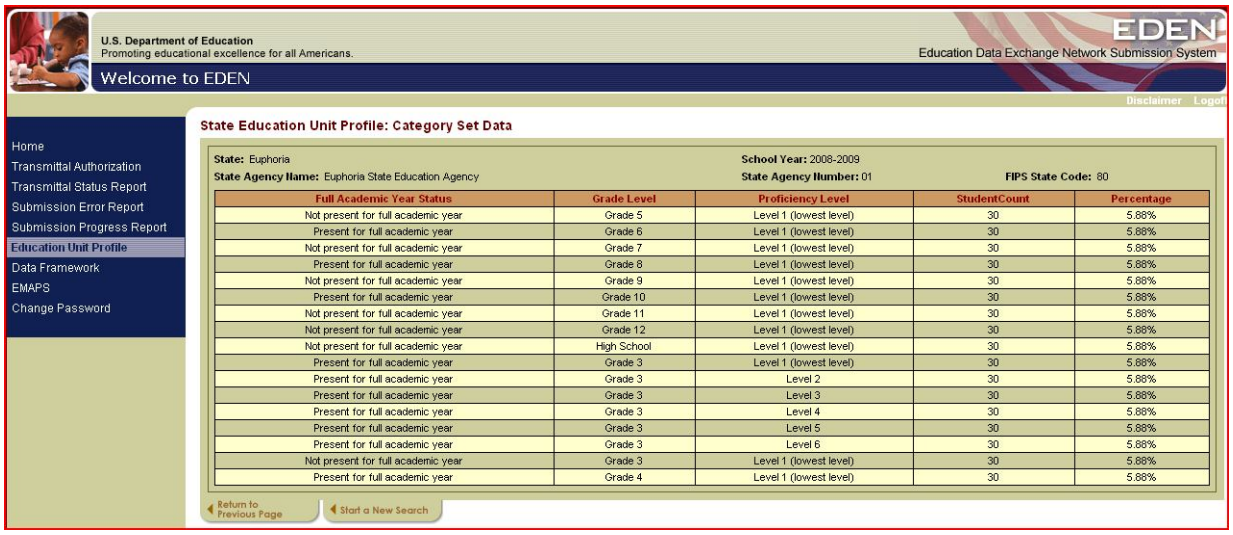
The name of the selected data group is listed at the top of the display. Figure 8-6 shows the category sets for data group 85, Children with Disabilities (IDEA) Exiting Special Education Tables. To access data for a specific category set, click the ***See Data*** link to the right of the category set name.

Figure 8-6: Education Unit Profile: Data Categories



After you click the ***See Data*** hyperlink, your data are displayed for each combination of permitted values in the selected category set. Figure 8-7 shows the data for the Basis of Exit, Gender category set. These data can be sorted by clicking on the column headings.

Figure 8-7: Education Unit Profile Data

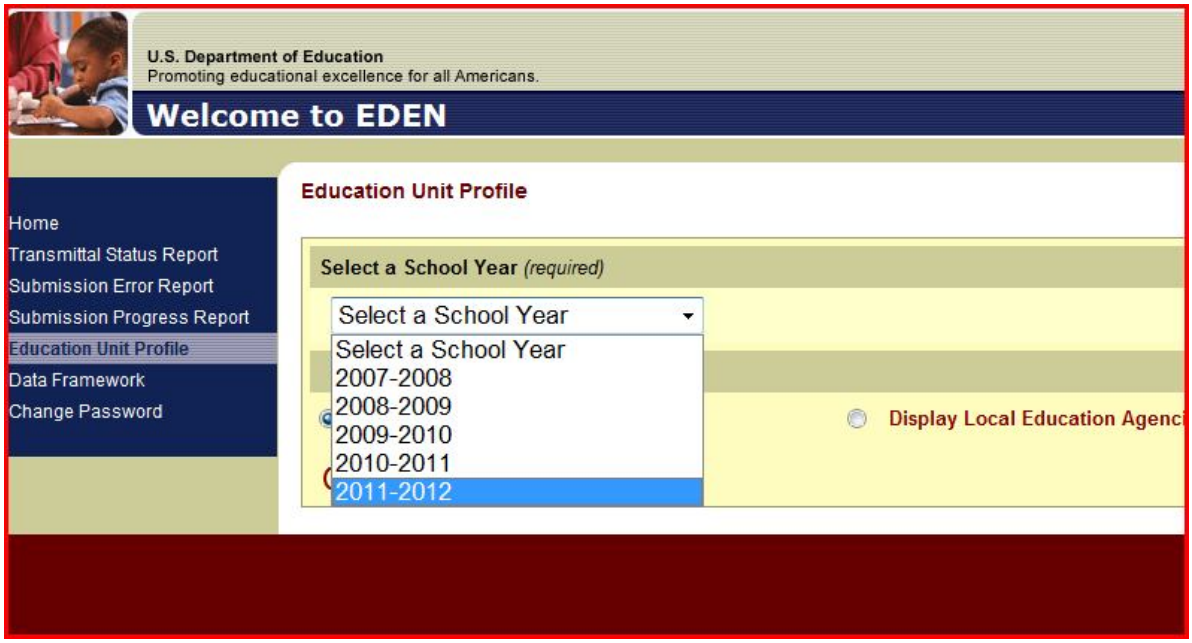


8.3 Accessing Local Education Agency (LEA) Data

The steps for accessing your LEA data are very similar to those for accessing your SEA data, with a few more options to specify an LEA if you choose to do so. To access LEA level data, mark the ***Display Local Education Agencies*** button at the bottom of the main Education Unit Profile page, under the Select a Results List area.

You must also select a school year period from the ***Select a School Year*** drop-down list (Figure 8-8) and then click ***GO***.

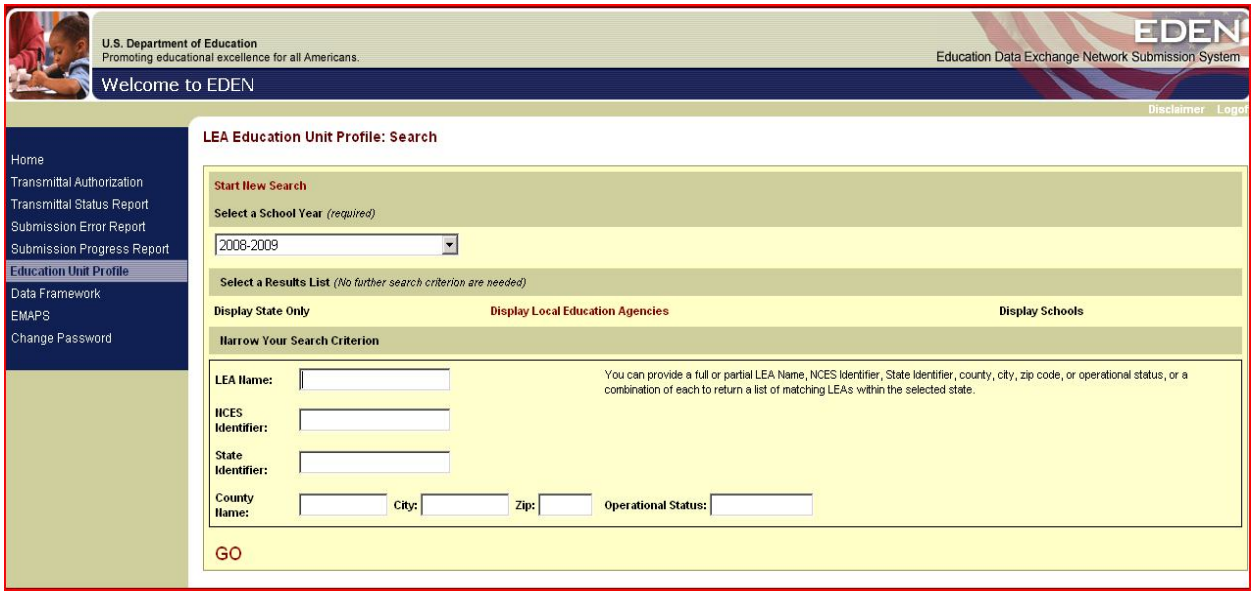
Figure 8-8: Education Unit Profile



After you click ***GO***, the next screen is the Education Unit Profile Search page (Figure 8-9) where you can drill down to access specific LEAs or all LEAs within your state.

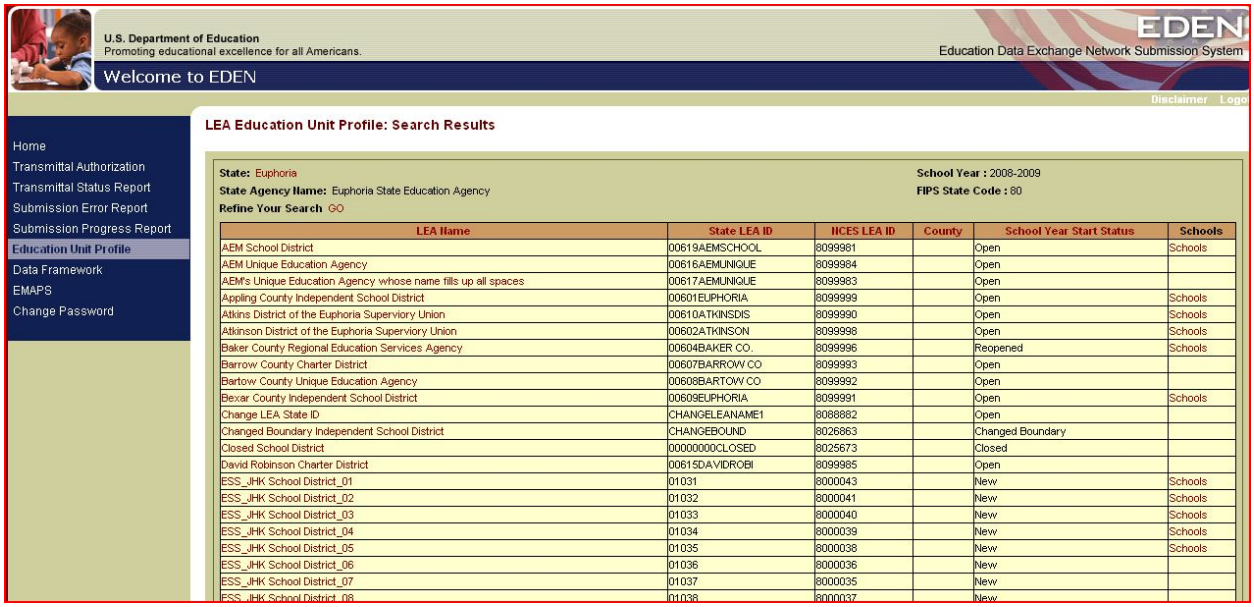
On the *LEA Education Unit Profile Search* page, either click the ***Display Local Education Agencies*** hyperlink to display all LEAs in your state or use ***Search*** criteria to access specific LEAs. As shown in Figure 8-9, search criteria include LEA name, NCES identifier, State identifier, county name, city, zip code, or operational status. Click ***GO*** after you enter your search criteria.

Figure 8-9: LEA Education Unit Profile Search Page



After you click ***GO***, the Education Unit Profile: Search Results page (Figure 8-10) displays an alphabetical list of all LEAs that met your search criteria. This page displays the LEA Name, State LEA ID, NCES LEA ID, County, and Operational Status. You can sort the list of LEAs by clicking on any of these column headings.

Figure 8-10: LEA Education Unit Profile Search Results



LEA Name	State LEA ID	NCES LEA ID	County	School Year Start Status	Schools
AEM School District	00619AEMSCHOOL	8099981		Open	Schools
AEM Unique Education Agency	00616AEMUNIQUE	8099984		Open	
AEM's Unique Education Agency whose name fills up all spaces	00617AEMUNIQUE	8099983		Open	
Appling County Independent School District	00601EUPHORIA	8099999		Open	Schools
Atkins District of the Euphoria Superviory Union	00610ATKINSDIS	8099990		Open	Schools
Atkinson District of the Euphoria Superviory Union	00602ATKINSON	8099998		Open	Schools
Baker County Regional Education Services Agency	00604BAKER CO.	8099996		Reopened	Schools
Barrow County Charter District	00607BARROW CO	8099993		Open	
Bartow County Unique Education Agency	00608BARTOW CO	8099992		Open	
Bexar County Independent School District	00609EUPHORIA	8099991		Open	Schools
Change LEA State ID	CHANGELEANAME1	8088882		Open	
Changed Boundary Independent School District	CHANGEBOUND	8026863		Changed Boundary	
Closed School District	00000000CLOSED	8025673		Closed	
David Robinson Charter District	00615DAVIDROBI	8099985		Open	
ESS_JHK School District_01	01031	8000043		New	Schools
ESS_JHK School District_02	01032	8000041		New	Schools
ESS_JHK School District_03	01033	8000040		New	Schools
ESS_JHK School District_04	01034	8000039		New	Schools
ESS_JHK School District_05	01035	8000038		New	Schools
ESS_JHK School District_06	01036	8000036		New	
ESS_JHK School District_07	01037	8000035		New	
ESS_JHK School District_08	01038	8000037		New	

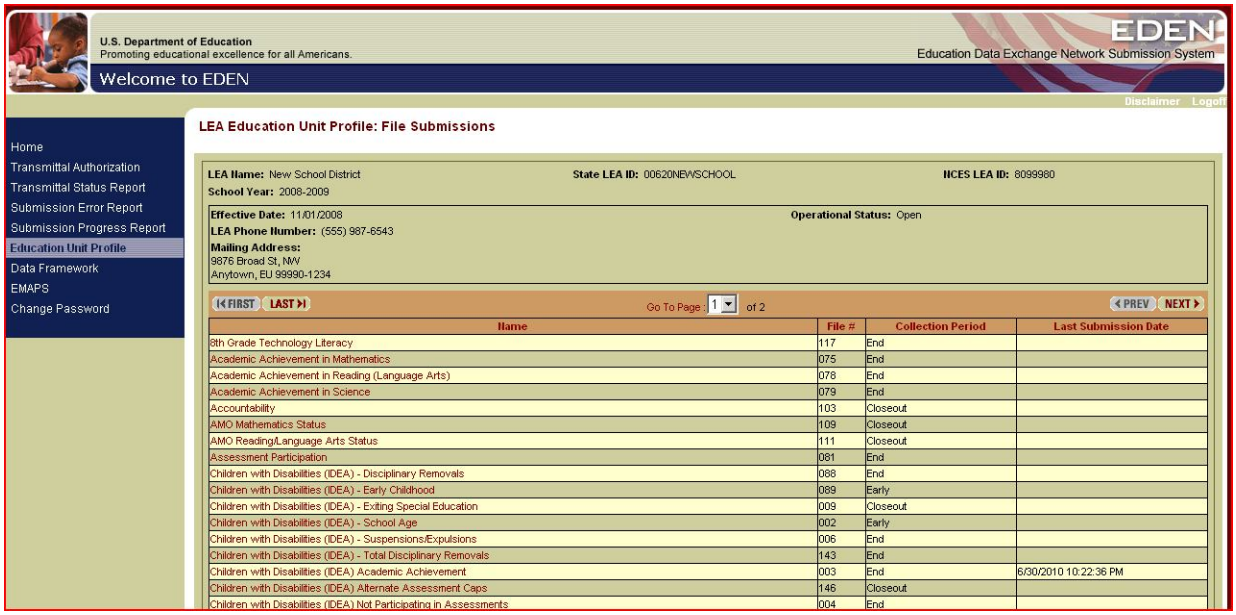
To view the data for a particular LEA, click on the LEA name.

You can also access the list of all schools for an LEA from the LEA Education Unit Profile: Search Results page by clicking the ***Schools*** hyperlink to the right of the LEA

name. However, it is recommended that you access school data using the ***Display Schools*** portal on the main *Education Unit Profile* page. Section 8.4 contains more information about accessing school data.

After you select an LEA by clicking on its name, you will reach the LEA Education Unit Profile: File Submissions page (Figure 8-11). In alphabetical order by name, this page lists all of the files collected by ED*Facts.* It also lists the file number, data collection period, and the date and time of your most recent submission for the selected school year. Clicking on a file heading sorts the list of files by that characteristic.

Figure 8-11: LEA Education Unit Profile File Submissions



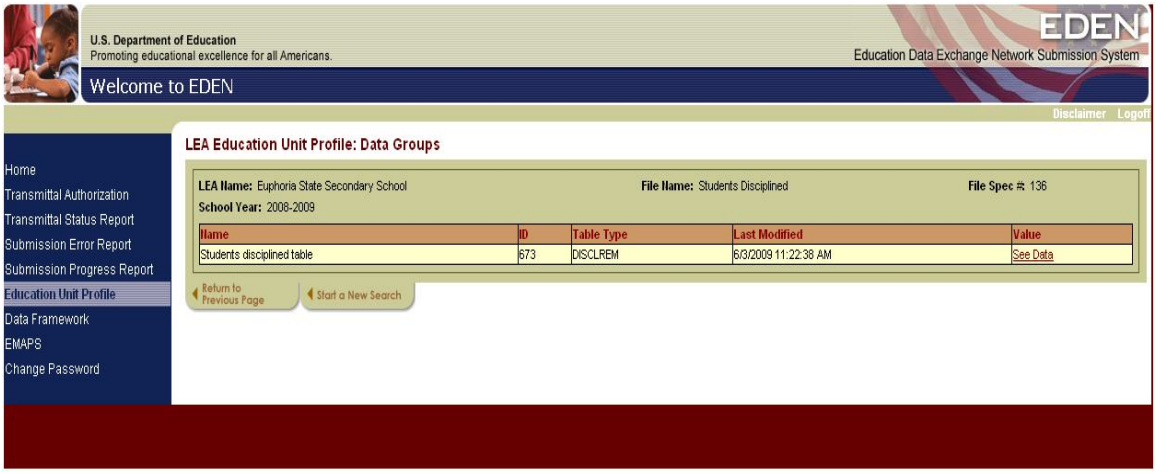
The *LEA Education Unit Profile*: File Submissions page also displays information about the specific LEA you selected (e.g., name and address, telephone number, Operational Status). If the effective date was not submitted through an LEA directory submission, a default effective date is displayed.

To view your data, click the name of the file you want to access. If the last submission date is blank, no data were submitted and therefore are not available for viewing.

Clicking on the file name takes you to the *LEA Education Unit Profile*: *Data Groups* page (Figure 8-12). Information at the top of the page describes the selections you have made so far: the LEA's name, the reference period selected, and the name and number of the file selected. This description is followed by a list of the data groups in the specification for this file, the date and time your data were most recently modified, and the ***See Data*** hyperlink. Click the ***See Data*** hyperlink for the data group you want to view.

You can also access historical information found in the Directory file from the LEA Education Unit Profile: Data Groups page by clicking the ***Directory*** file name. Section 8.5 has more information about accessing historical Directory information.

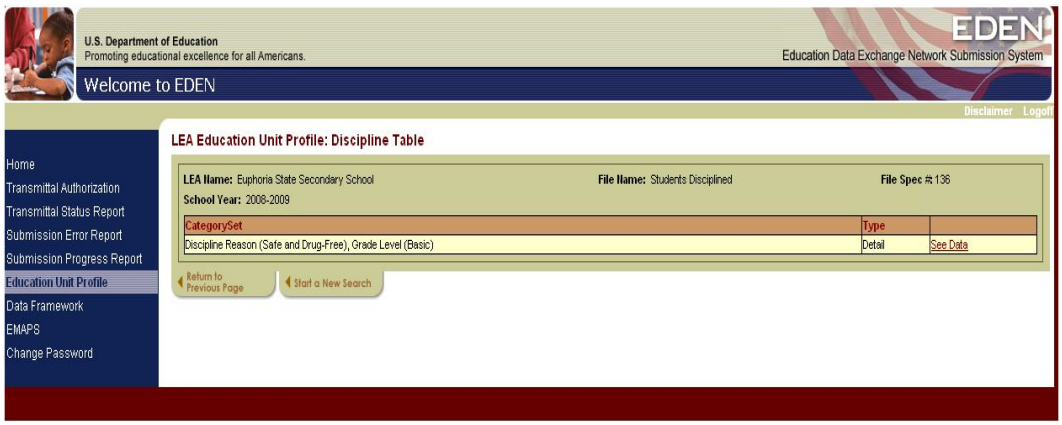
Figure 8-12 LEA Education Unit Profile Data Groups



Clicking the ***See Data*** hyperlink takes you to an alphabetical list of all the data category sets for the selected data group. Clicking on a file heading sorts the list of files by that characteristic.

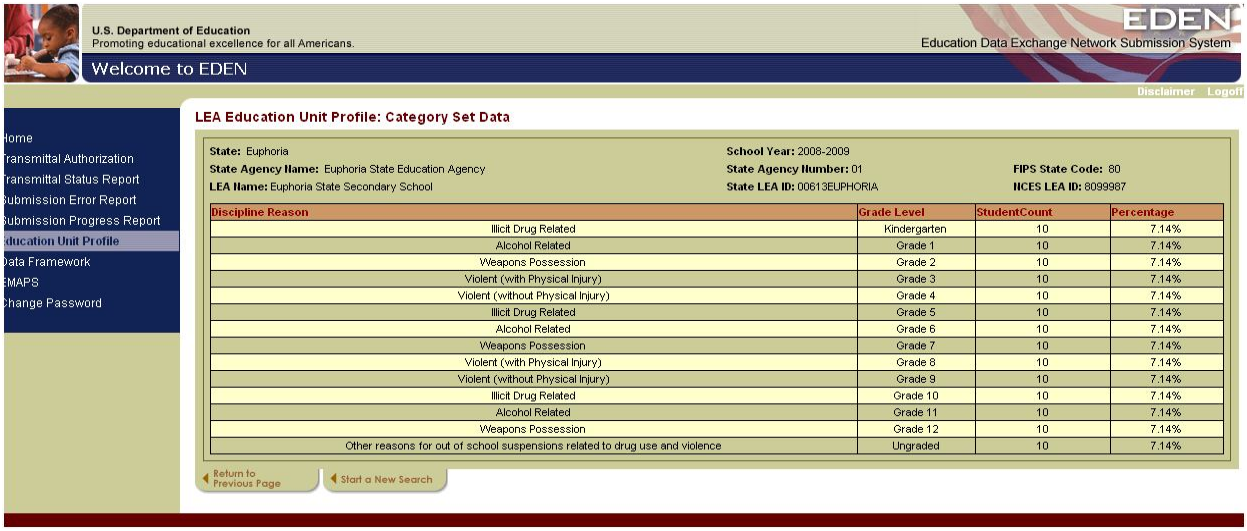
The name of the selected data group is listed at the top of the display. Figure 8-13 shows the category sets for data group 673, Students Disciplined Table. To access data for a specific category set, click the ***See Data*** link to the right of the category set name.

Figure 8-13 LEA Education Unit Profile Data Categories



After you click the ***See Data*** hyperlink, your data are displayed for each combination of permitted values in the selected category set. Figure 8-14 shows the data for category set Discipline Reason. Data can be sorted by clicking on the column headings.

Figure 8-14: LEA Education Unit Profile Data



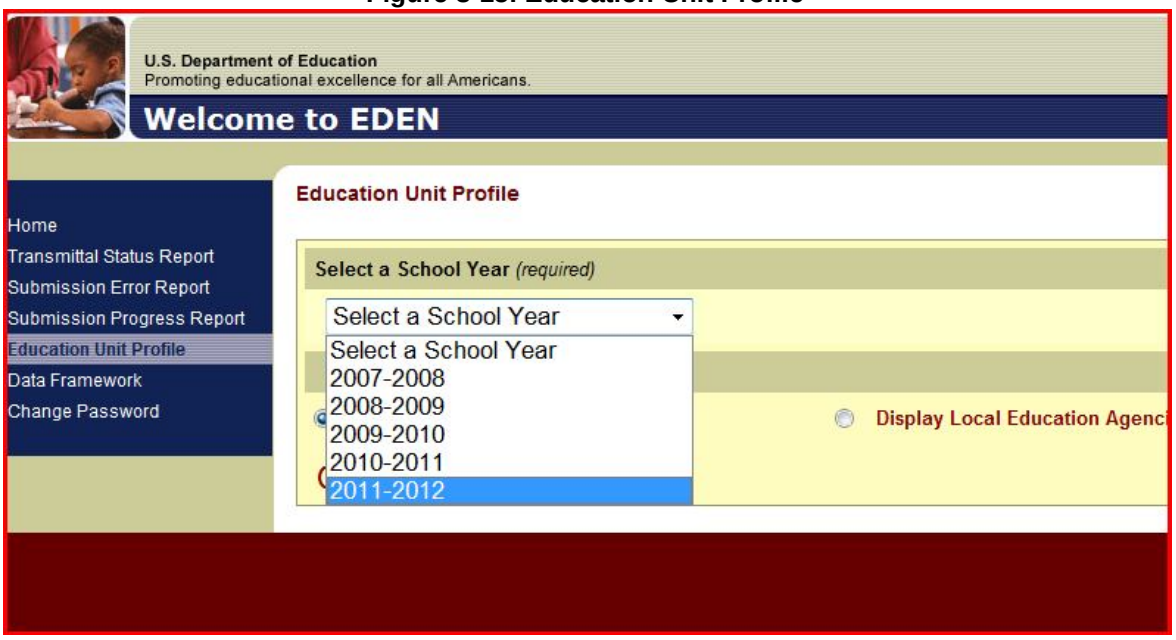
Discipline Reason	Grade Level	StudentCount	Percentage
Illicit Drug Related	Kindergarten	10	7.14%
Alcohol Related	Grade 1	10	7.14%
Weapons Possession	Grade 2	10	7.14%
Violent (with Physical Injury)	Grade 3	10	7.14%
Violent (without Physical Injury)	Grade 4	10	7.14%
Illicit Drug Related	Grade 5	10	7.14%
Alcohol Related	Grade 6	10	7.14%
Weapons Possession	Grade 7	10	7.14%
Violent (with Physical Injury)	Grade 8	10	7.14%
Violent (without Physical Injury)	Grade 9	10	7.14%
Illicit Drug Related	Grade 10	10	7.14%
Alcohol Related	Grade 11	10	7.14%
Weapons Possession	Grade 12	10	7.14%
Other reasons for out of school suspensions related to drug use and violence	Ungraded	10	7.14%

8.4 Accessing School Level Data

The steps for accessing your school level data are very similar to those for accessing your LEA data and with similar options. To access school level data, mark the ***Display Schools*** button at the bottom of the main Education Unit Profile page, under the ***Select a Results List*** area.

You must also select a school year from the ***Select a School Year*** drop-down list (Figure 8-15) and then click ***GO***.

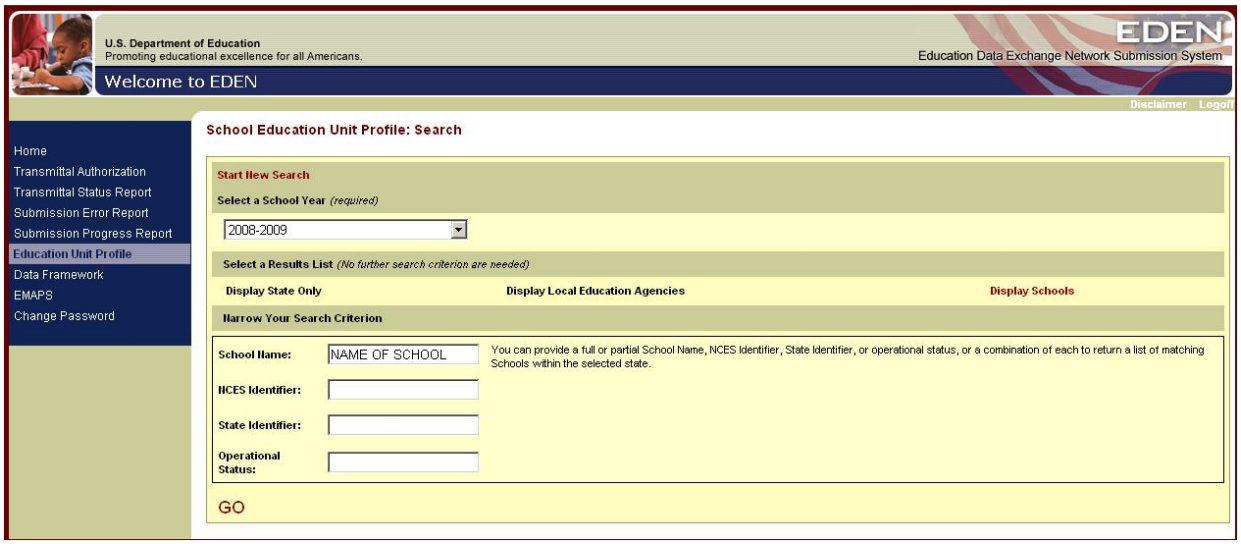
Figure 8-15: Education Unit Profile



When you click ***GO,*** you will be taken to the School Education Unit Profile Search page (Figure 8-16) where you can drill down to access a specific school or view data for all schools in your state.

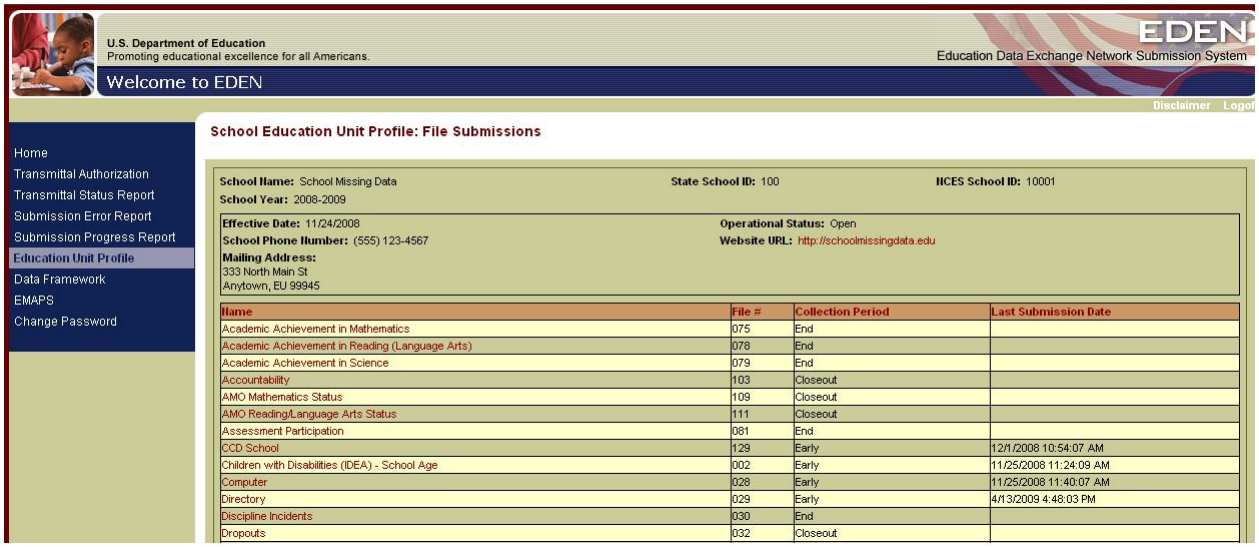
On the School *Education Unit Profile* Search page (Figure 8-16), either click the ***Display Schools*** hyperlink to display all schools in your state or use search criteria to access a specific school. As shown in the Figure, search criteria include School Name, NCES identifier, SEA Identifier or Operational Status. Click ***GO*** after you enter your search criteria.

Figure 8-16: School Education Unit Profile Search Page



After you click ***GO***, the *School Education Unit Profile*: *File Submissions page* (Figure 8-17) lists all of the files collected by EDFACTS. It also lists the file number, data collection period, and the date and time of your most recent submission for the selected school year. Clicking on a file heading sorts the list of files by that characteristic.

Figure 8-17: School Education Unit Profile File Submissions



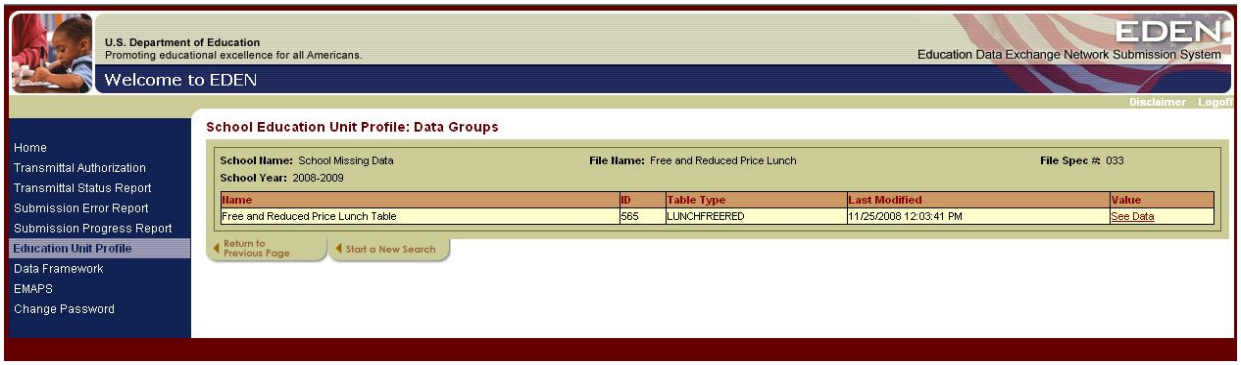
The *School Education Unit Profile: File Submissions* page also displays information about the specific school you selected (e.g., name, address, telephone number, Operational Status). If the effective date was not submitted through a School directory submission, a default effective date is displayed.

To view your data, click the name of the file you want to access. If the *last submission date* is blank, no data were submitted and therefore are not available for viewing.

Clicking on the file name takes you to the *Education Unit Profile: Data Groups* page (Figure 8-18). Information at the top of the page describes the selections you have made so far: the school's name, the reference period selected, and the name and number of the file selected. This description is followed by a list of the data groups in the specification for this file, the date and time your data were most recently modified, and the ***See Data*** hyperlink. Click the ***See Data*** hyperlink for the data group you want to view.

You can also access historical information found in the Directory file from the *Education Unit Profile: Data Groups* page by clicking the ***Directory*** file name. Section 8.5 contains more information about accessing historical Directory information.

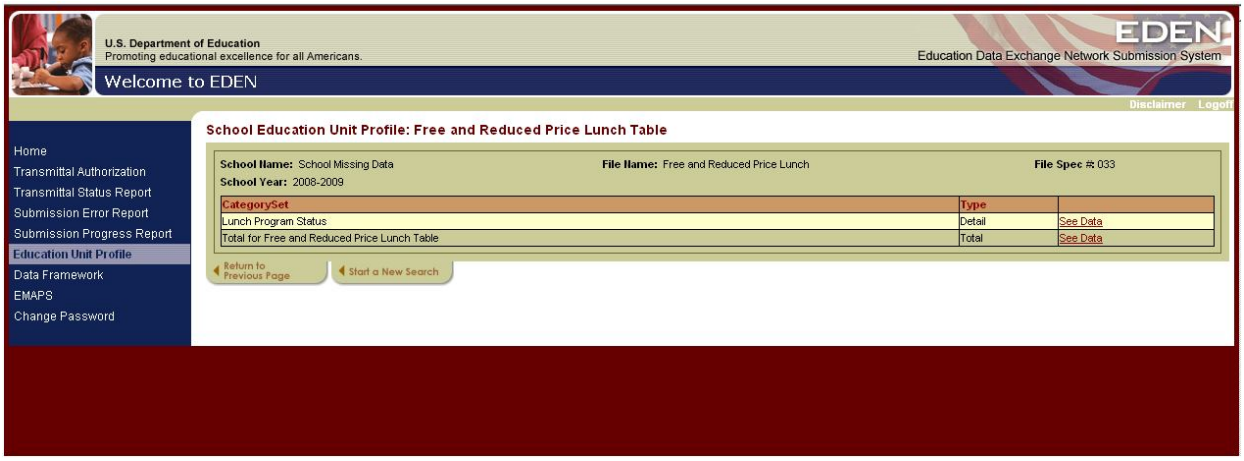
Figure 8-18: School Education Unit Profile Data Groups



Clicking the ***See Data*** hyperlink takes you to an alphabetical list of all the data category sets for the selected data group. Clicking on a file heading sorts the list of files by that characteristic.

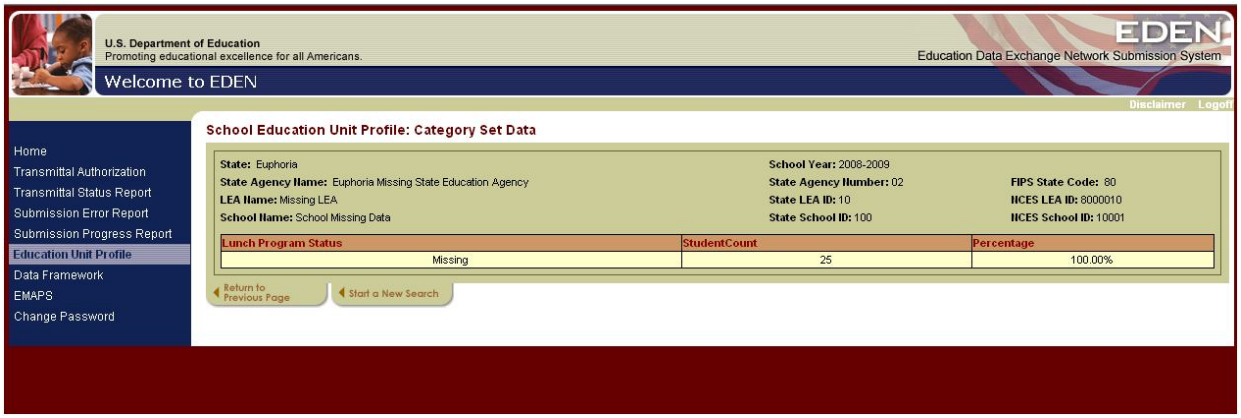
The name of the selected data group is listed at the top of the display. Figure 8-19 shows the category sets for data group 565, Free and Reduced Price Lunch Table. To access data for a specific category set, click the ***See Data*** link to the right of the category set name.

Figure 8-19 School Education Unit Profile Data Categories



After you click the ***See Data*** hyperlink, your data are displayed for each combination of permitted values in the selected category set. Figure 8-20 shows the data for Lunch Program Status category set. Data can be sorted by clicking on the column headings.

Figure 8-20: School Education Unit Profile Data



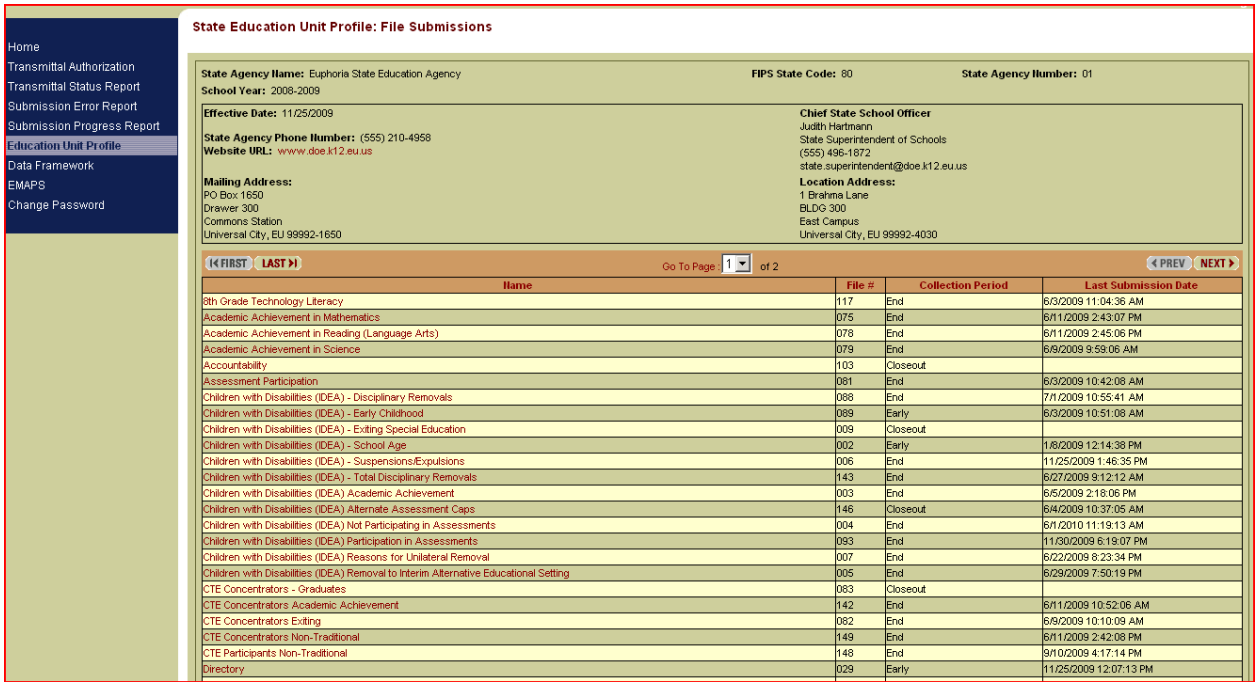
8.5 Accessing Historical Directory Information

You can access historical directory information to see previous information on selected directory data groups. For example, this feature will enable you to see when and how the Chief State School Officer or address of the SEA have changed, or the operational status, address, or NCES IDs have changed at the LEA or school level. To see directory information, click on the applicable ***Directory*** hyperlink for the educational unit level desired.

- *State Education Unit Profile: File Submissions* (Figure 8-21)
- *LEA Education Unit Profile: File Submissions*
- School Education Unit Profile: File Submissions

Section 8.2 provides information on accessing the *SEA level File Submission* page. Section 8.3 provides the same information for the *LEA level File Submission* page and Section 8.4 for the *school level File Submission* page.

Figure 8-21: State Education Unit Profile: File Submission



Clicking the ***Directory*** hyperlink takes you to an alphabetical list of all the data groups within the Directory. Clicking on a column heading sorts the list of data groups by that characteristic.

Figure 8-22: State Education Unit Profile: Directory Data Group

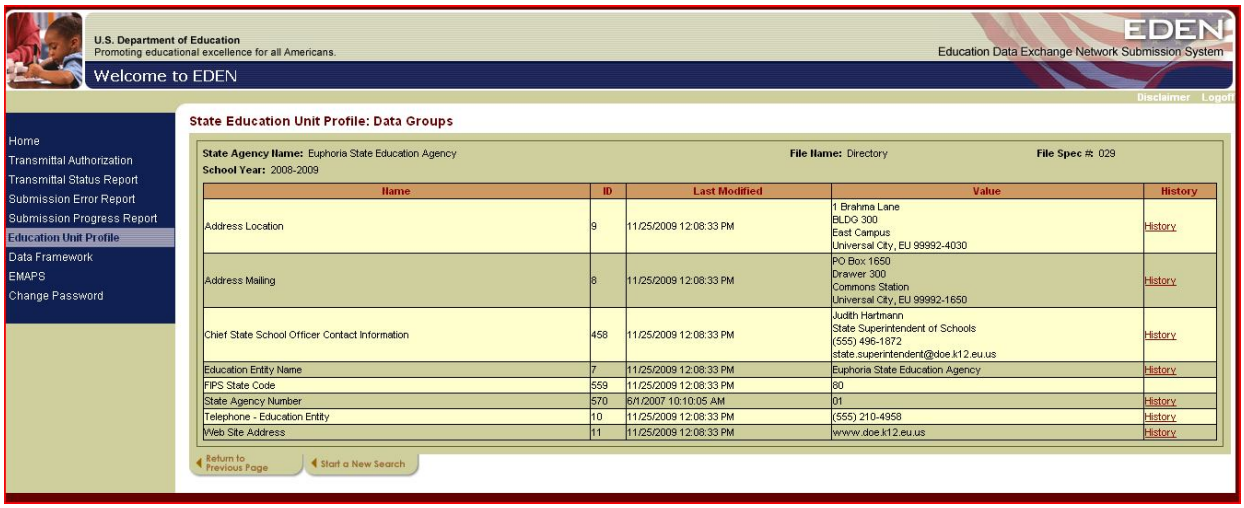
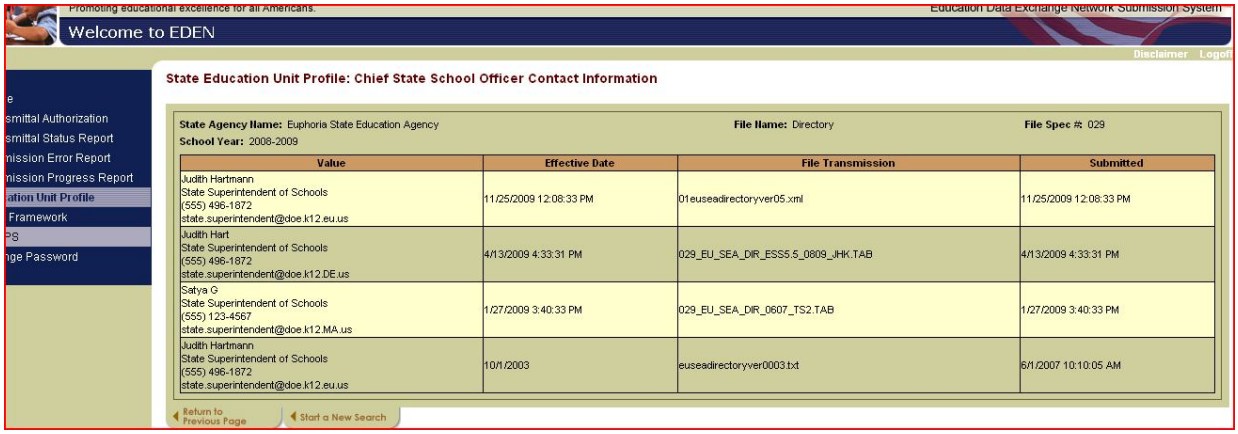


Figure 8-22 shows the data groups in the Directory at the SEA level. To access the history of any of the data groups, click the ***History*** link to the right of the data group name.

After you click the ***History*** link, your data are displayed. For example, Figure 8-23 shows data for the Chief State School Officer Contact Information for the state of Euphoria.

Figure 8-23: State Education Unit Profile: Chief State School Officer Contact Information



9 DATA FRAMEWORK

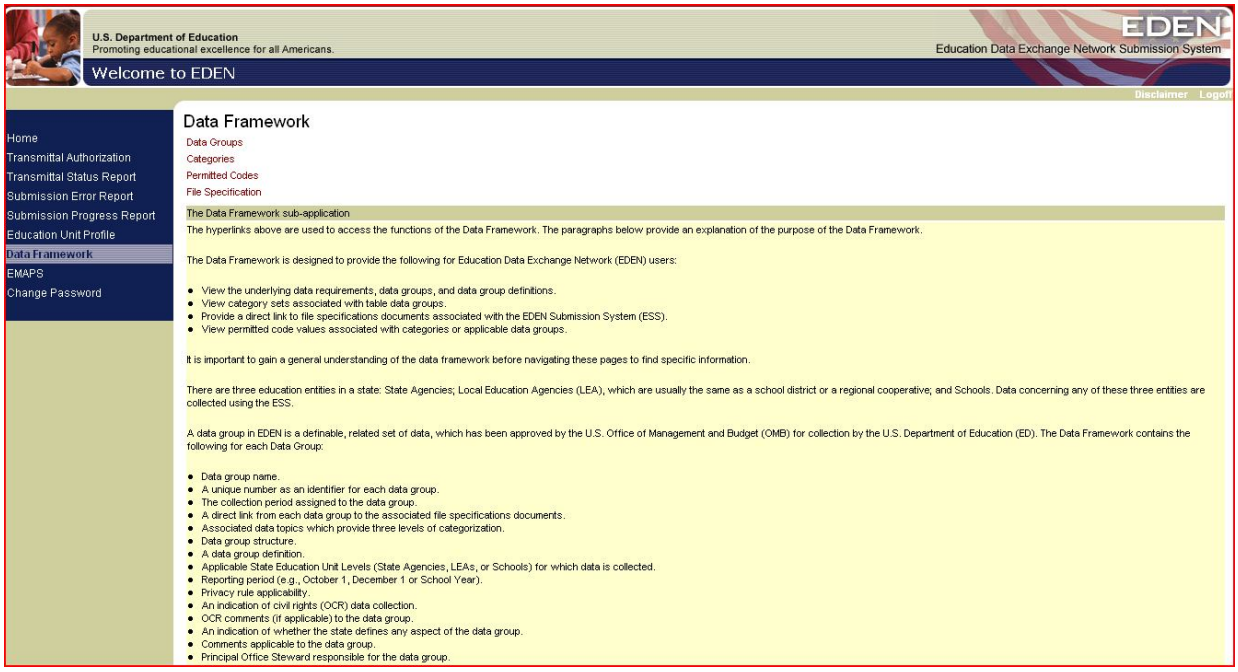
9.1 Purpose of Data Framework

The Data Framework sub-application provides the ability to view the underlying data requirements, data groups and definitions, category sets associated with table data groups, and permitted code values associated with categories or applicable data groups. This area also provides a direct link to online file specification documentation associated with the ED*Facts* Submission System (ESS).

9.2 Accessing the Data Framework

To invoke the Data Framework sub-application, click on the ***Data Framework*** left menu option. This will display the *Data Framework* page as shown in Figure 9-1. On the Data Framework page, you can select ***Data Groups, Categories, Permitted Codes, or File Specification.***

Figure 9-1: Data Framework



9.3 Using the Data Framework Sub-application

This section provides instructional information pertaining to the Data Framework sub-application and specifically highlights the interrelationships between all areas within the data framework. The terms used in this section are the terms that are currently used in the application. The display will then show the associations list to allow you to view the following information.

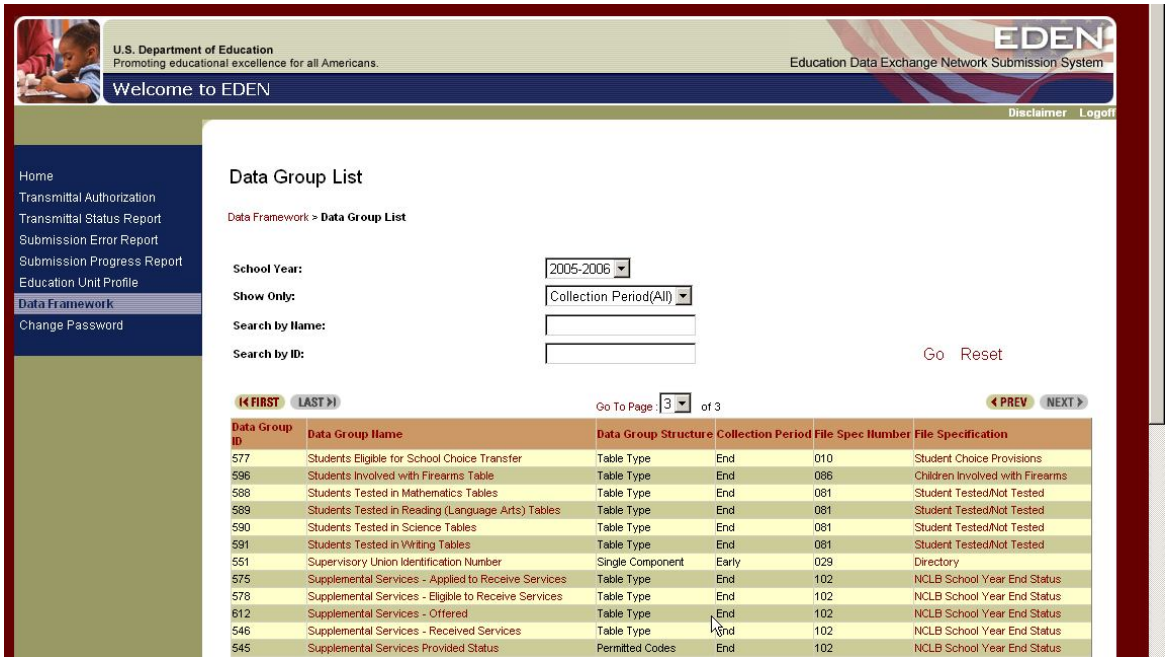
9.3.1 Data Groups

A data group in ED*Facts* is a definable, related set of data, which has been approved by the U.S. Office of Management and Budget (OMB) for collection by the U.S. Department of Education (ED). Access the Data Groups by clicking on the ***Data Groups*** hyperlink; this will display the ***Data Groups List*** page (Figure 9-2). The system will take you to the upper section of the page to filter the data groups into more manageable sections. The following is a list of search options:

- **School Year:** You must select one school year.
- **Show Only*:*** Allows you to search by all school years or a specific School Year AND all file types or a specific file type.
- **Search**: Allows you to conduct a free form field search. Note: Partial searches are accepted. For example, if you enter "St", you will be provided a list of all Data Groups with "st" in the name. There are two specific search options:
    - **Search by Name**: Allows you to search the data group name for specific text strings.
    - **Search by ID**: Using this option allows you to search for the unique identifier for each data elements.

After refining each of the first two required search criteria in the list above (***School Year*** and ***Show Only***), you may provide more specific selection criteria (***Search By Name*** or ***Search By ID***) to further narrow down your results. Click on the ***GO*** to view results once all search criteria are defined. If you need to change your selection criteria, click ***Reset*** to reset the search panel to all default values and you may customize your criteria again.

Figure 9-2: Data Group Search

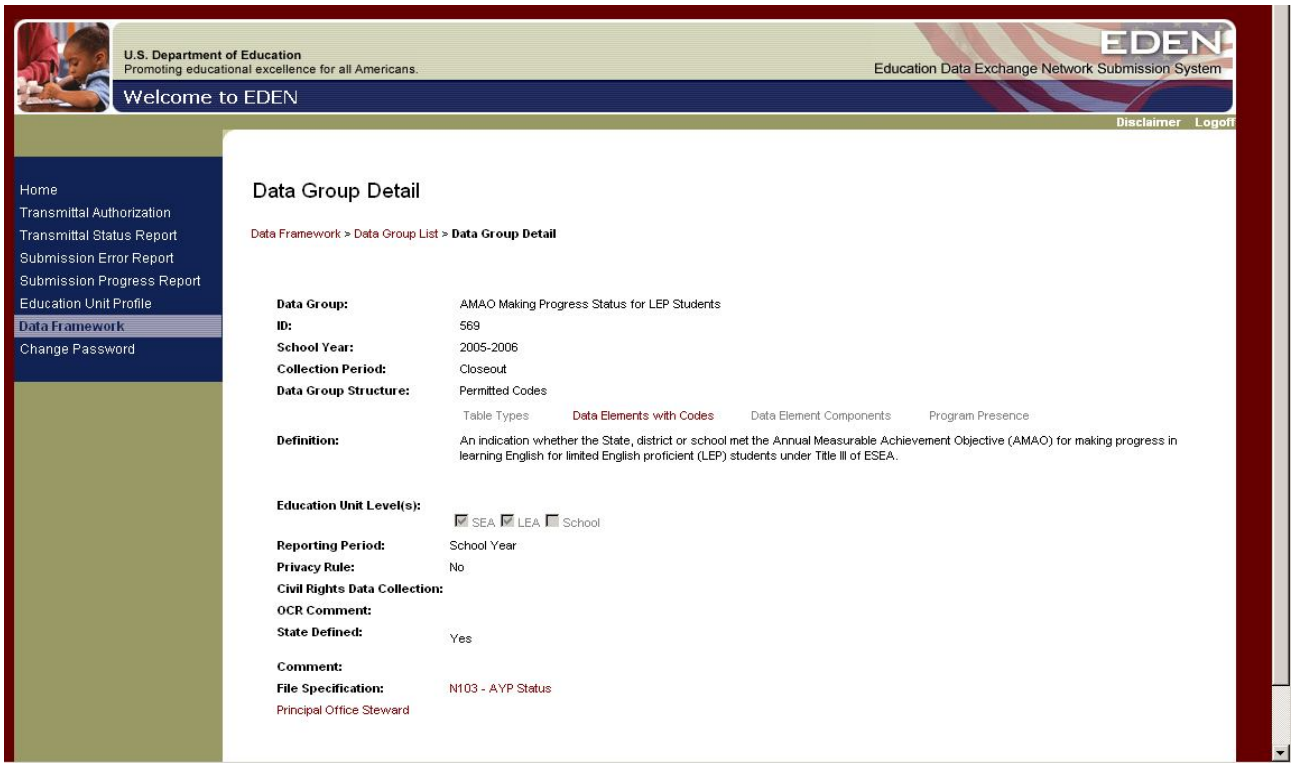


Once ***GO*** is clicked, you are provided with a list of data groups that fit the selection criteria. From this screen (Figure 9-2), you can view the ***Data Group ID***, ***Data Group Name, Data Group Structure, Collection Period (e.g., End, Early, Closeout)*** and ***File Specification Number***. You can also link from each data element to the associated ***File Specification*** documentation.

Once you find the data group of interest, click the ***Data Group Name*** hyperlink for more information (Figure 9-3). The Data Group contains the following for each Data Group:

- **Data Group**: Data element name.
- **ID**: A unique number as an identifier for each data element.
- **School Year**: the school year of the collection that contains this data group.
- **Collection Period**: The collection period assigned to the data element (i.e., Beginning, End).
- **Data Group Structure**: Links to Permitted Codes, Table Types and Data Elements with Codes, Data Element Components, and Program Presence.
- **Definition**: A data element definition.
- **Education Unit Level**: Indicates education unit levels (SEAs, LEAs, or schools) for which data is collected.
- **Reporting Period**: The period for which the data element is reported. Data elements are usually reported for the entire school year (cumulative) or as a snapshot on or close to a specific data (i.e., November 1 or December 1).
- **Privacy Rule**: An indicator of whether Privacy Rule applies.
- **Civil Rights Data Collection**: An indicator of whether the data element applies to the Office of Civil Rights (OCR) data collection.
- **OCR Comment**: If applicable, comments pertaining to the Civil Rights Data Collection.
- **State Defined**: An indicator of whether the state defines any aspect of the data element.
- **Comment**: General comments applicable to the data element.
- **File Spec Number**: The number of the file specification that links to that data group.
- **Principal Office Steward**: Clicking on the ***Principal Office Steward*** hyperlink will show the Principal Office Steward responsible for the data element.

Figure 9-3: ESS Data Element Information



9.3.2 Categories

Return to the main *Data Framework page* and click on the ***Categories*** hyperlink page to display the ***Categories*** page (Figure 9-4). The system will take you to the upper section of the page to filter the data groups into more manageable sections.

A Category characterizes a count, dollar value, rate, or program presence for the table entries of a Table or List ED*Facts* Data Element. A Category is a grouping that a SEA uses to aggregate data before the SEA sends the data to ED.

Below are some of the specific categories that are used for student data:

- Grade Level
- Gender
- Age
- Migrant Status
- Homeless Status
- English Proficiency Level

Below are some of the specific categories that are used for staff and teacher data:

- Qualification Status (Teacher)
- Staff Category
- Certification Status

Categories have been defined for other groupings such as programs, assessments, and incidents of discipline.

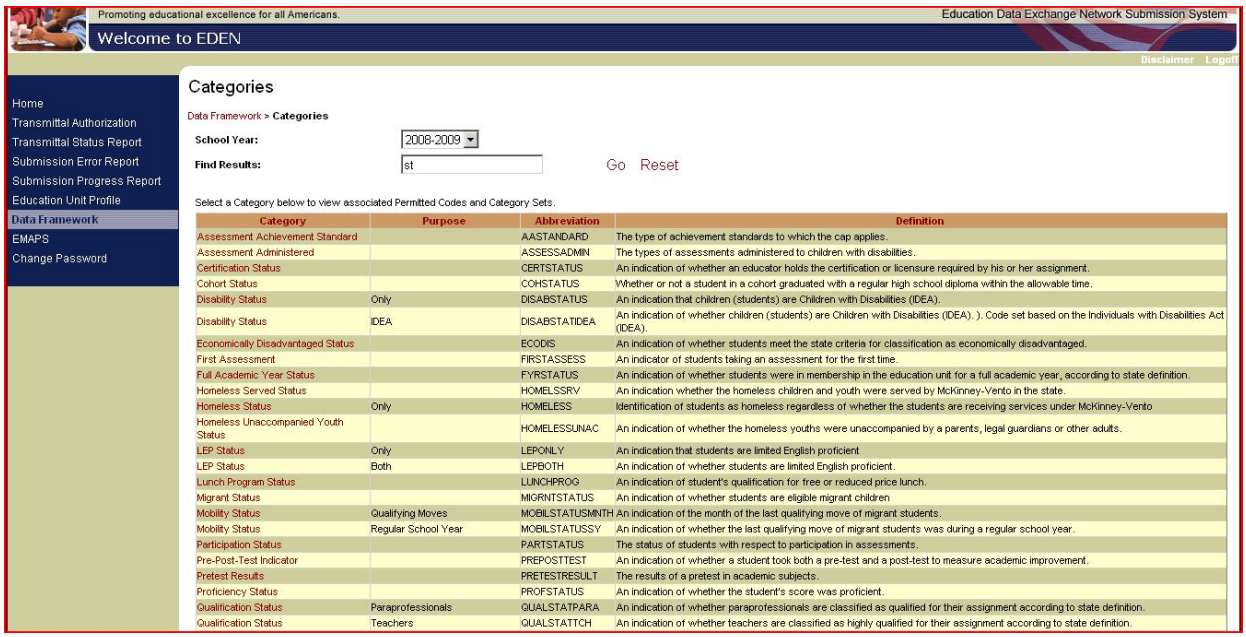
A Category Set is a group or combination of Categories that are used together. For example, the Student Membership Table data group has a category set consisting of the following three (3) categories: Grade Level (membership), Race/Ethnicity, and Gender. ED*Facts* does not accept separate transactions to report such a set of data for a specific education unit, but rather, receives the entire data group from the SEA. In other words, all the data for a complete Student Membership Table for one or more education units is transmitted in a single submission.

The following is a list of search options:

- **School Year:** You must select one school year.
- **Find Results**: Allows you to conduct a free form field search. Note: Partial searches are accepted. For example, if you enter "St", you will be provided a list of all Categories with "ST" in the name.

After entering the selected search criteria, click on the ***GO*** button to view results.

Figure 9-4: ESS Categories



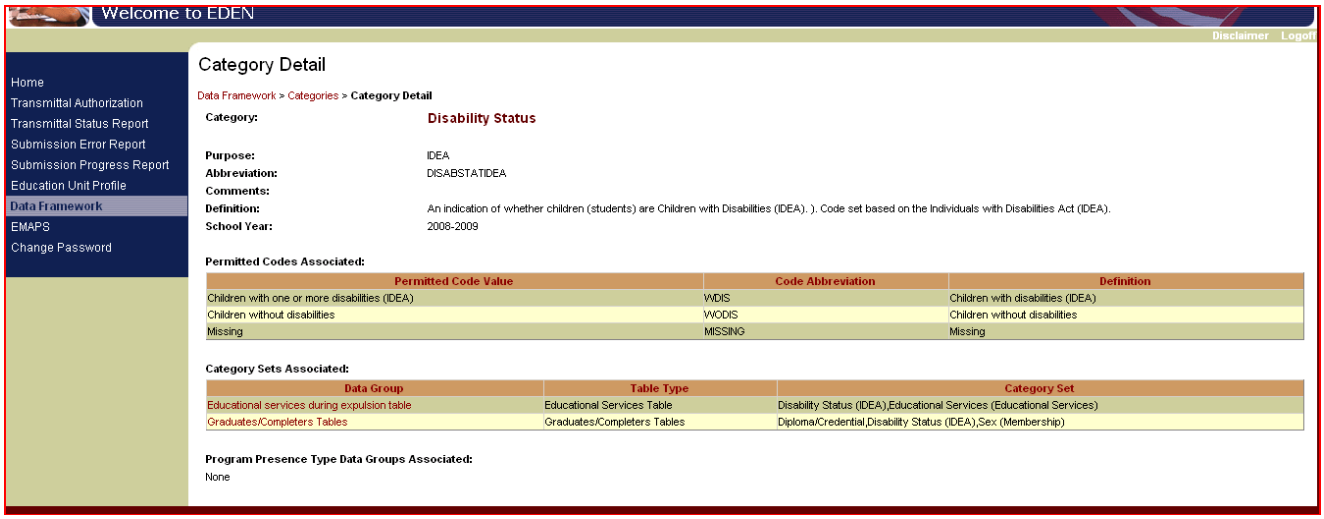
Category	Purpose	Abbreviation	Definition
Assessment Achievement Standard		AASTANDARD	The type of achievement standards to which the cap applies.
Assessment Administered		ASSESSADMIN	The types of assessments administered to children with disabilities.
Certification Status		CERTSTATUS	An indication of whether an educator holds the certification or licensure required by his or her assignment.
Cohort Status		COHSTATUS	Whether or not a student in a cohort graduated with a regular high school diploma within the allowable time.
Disability Status	Only	DISABSTATUS	An indication that children (students) are Children with Disabilities (IDEA).
Disability Status	IDEA	DISABSTATIDEA	An indication of whether children (students) are Children with Disabilities (IDEA).). Code set based on the Individuals with Disabilities Act (IDEA).
Economically Disadvantaged Status		ECODIS	An indication of whether students meet the state criteria for classification as economically disadvantaged.
First Assessment		FIRSTASSESS	An indicator of students taking an assessment for the first time.
Full Academic Year Status		FYRSTATUS	An indication of whether students were in membership in the education unit for a full academic year, according to state definition.
Homeless Served Status		HOMELSSRV	An indication whether the homeless children and youth were served by McKinney-Vento in the state.
Homeless Status	Only	HOMELESS	Identification of students as homeless regardless of whether the students are receiving services under McKinney-Vento
Homeless Unaccompanied Youth Status		HOMELESSUNAC	An indication of whether the homeless youths were unaccompanied by a parents, legal guardians or other adults.
LEP Status	Only	LEPONLY	An indication that students are limited English proficient
LEP Status	Both	LEPBOTH	An indication of whether students are limited English proficient.
Lunch Program Status		LUNCHPROG	An indication of student's qualification for free or reduced price lunch.
Migrant Status		MIGRNTSTATUS	An indication of whether students are eligible migrant children
Mobility Status	Qualifying Moves	MOBILSTATUSMNTH	An indication of the month of the last qualifying move of migrant students.
Mobility Status	Regular School Year	MOBILSTATUSSY	An indication of whether the last qualifying move of migrant students was during a regular school year.
Participation Status		PARTSTATUS	The status of students with respect to participation in assessments.
Pre-Post-Test Indicator		PREPOSTTEST	An indication of whether a student took both a pre-test and a post-test to measure academic improvement.
Pretest Results		PRETESTRESULT	The results of a pretest in academic subjects.
Proficiency Status		PROFSTATUS	An indication of whether the student's score was proficient.
Qualification Status	Paraprofessionals	QUALSTATPARA	An indication of whether paraprofessionals are classified as qualified for their assignment according to state definition.
Qualification Status	Teachers	QUALSTATTCH	An indication of whether teachers are classified as highly qualified for their assignment according to state definition.

Once ***GO*** is clicked, you are provided a list of categories that fit the selection criteria. From this screen (Figure 9-4), you can view the Category, Purpose, Abbreviation, and Definition.

Once you find the data group of interest, click the name of a ***Category*** hyperlink from the Data Framework page for more information (Figure 9-4). You will then be taken to a

screen that will provide Category Details (Figure 9-5). You can view the Permitted Code Value, Code Abbreviation, and Definition.

Figure 9-5: ESS Category Details



At the bottom portion of the screen, hyperlinks are provided under ***Category Sets Associated*** to other data groups that use this category.

9.3.3 Permitted Codes and Associations

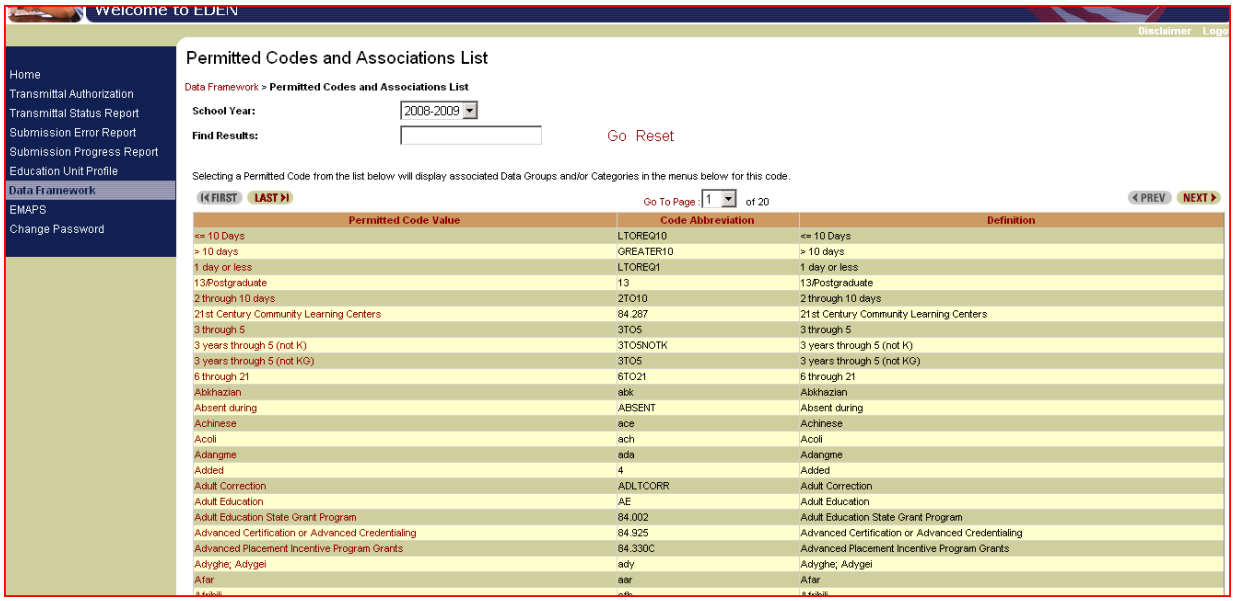
Return to the main Data Framework page and click on the ***Permitted Codes*** hyperlink to display the ***Permitted Codes*** page (Figure 9-6). The system will take you to the upper section of the page to filter the data groups into more manageable sections. The following is a list of search options:

Permitted Code, also referred to as Permitted Value, is a possible value that can be reported for certain data associated with a Data Element. For Count Types, a Category will have Permitted Codes. Example: Gender has Permitted Codes of Male and Female.

- ***School Year*:** You must select one school year.
- ***Find Results***: Allows you to conduct a free form field search. Note: Partial searches are accepted. For example, if you enter “St”, you will be provided a list of all Permitted Codes with “st” in the name.

After entering the selected search criteria, click on the ***GO*** button to view results.

Figure 9-6: Permitted Value Codes



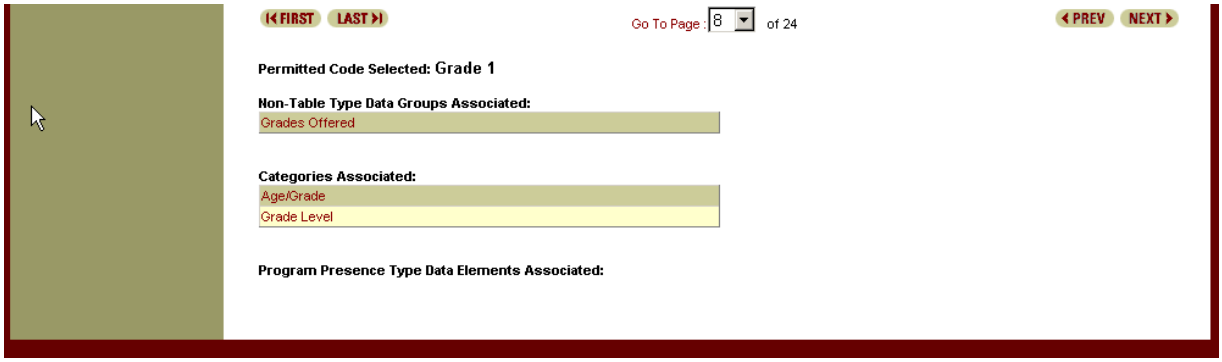
Permitted Code Value	Code Abbreviation	Definition
<= 10 Days	LTOREQ10	<= 10 Days
> 10 days	GREATER10	> 10 days
1 day or less	LTOREQ1	1 day or less
13/Postgraduate	13	13/Postgraduate
2 through 10 days	2TO10	2 through 10 days
21st Century Community Learning Centers	84.287	21st Century Community Learning Centers
3 through 5	3TO5	3 through 5
3 years through 5 (not K)	3TO5NOTK	3 years through 5 (not K)
3 years through 5 (not KG)	3TO5	3 years through 5 (not KG)
6 through 21	6TO21	6 through 21
Abkhazian	abk	Abkhazian
Absent during	ABSENT	Absent during
Achinese	ace	Achinese
Acoli	ach	Acoli
Adangme	ada	Adangme
Added	4	Added
Adult Correction	ADLTCORR	Adult Correction
Adult Education	AE	Adult Education
Adult Education State Grant Program	84.002	Adult Education State Grant Program
Advanced Certification or Advanced Credentialing	84.925	Advanced Certification or Advanced Credentialing
Advanced Placement Incentive Program Grants	84.330C	Advanced Placement Incentive Program Grants
Adyghe; Adygei	ady	Adyghe; Adygei
Afar	aar	Afar

Once you find the Permitted Code of interest, click on its name for more information (Figure 9-6). Scroll to the bottom of the screen to see the information associated with the Permitted Code. This information includes:

- Non-Table Type Data Elements Associated.
- Categories Associated.
- Program Presence Type Data Elements Associated.

This information will vary according to Permitted Code; Figure 9-7 shows the information displayed for the Permitted Code "Grade 1".

Figure 9-7: Permitted Value Codes Associations

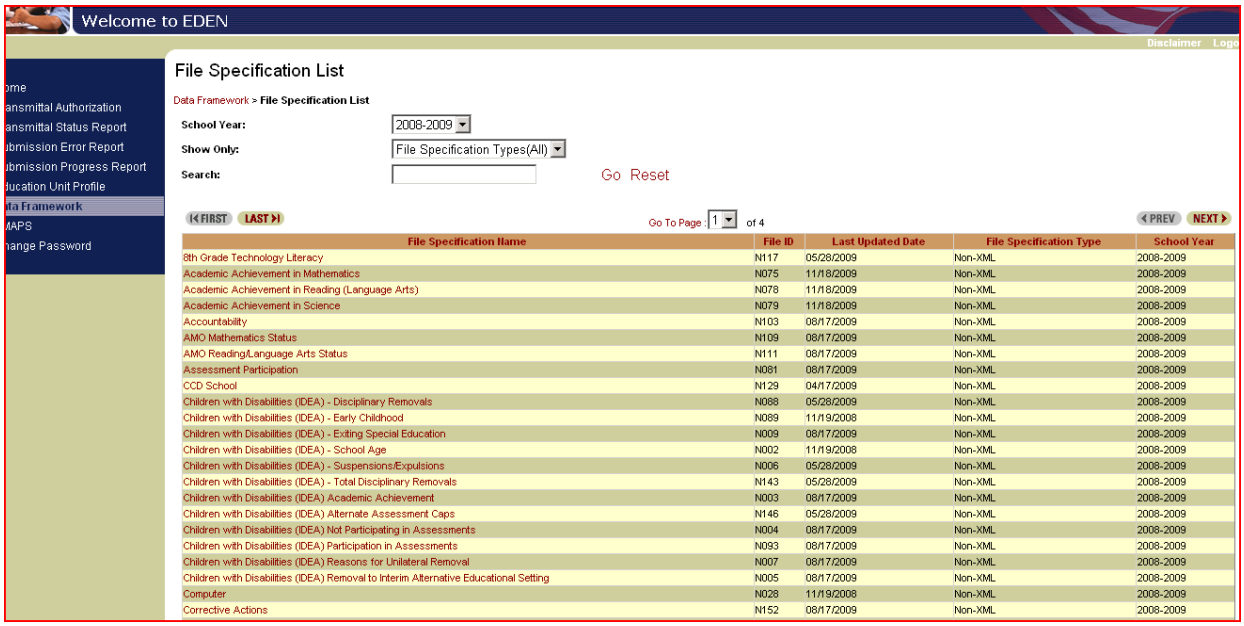


9.3.4 File Specifications

This section provides online access to the most up-to-date file specifications for the

school year selected. To access this section of ESS, return to the main Data Framework page and click on the ***File Specification*** hyperlink to display the list of file specifications (Figure 9-8).

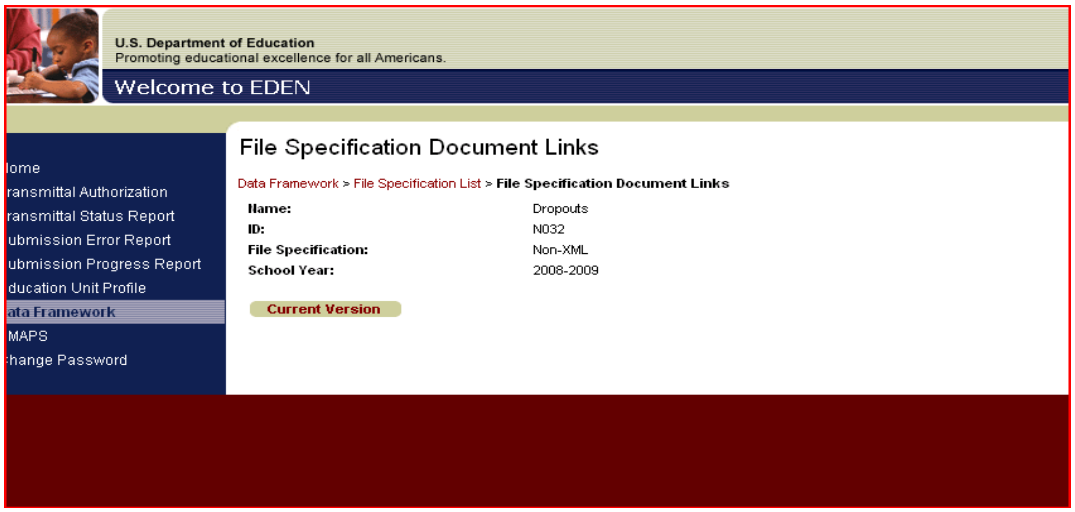
Figure 9-8: ESS File Specifications



File Specification Name	File ID	Last Updated Date	File Specification Type	School Year
8th Grade Technology Literacy	N117	05/28/2009	Non-XML	2008-2009
Academic Achievement in Mathematics	N075	11/18/2009	Non-XML	2008-2009
Academic Achievement in Reading (Language Arts)	N078	11/18/2009	Non-XML	2008-2009
Academic Achievement in Science	N079	11/18/2009	Non-XML	2008-2009
Accountability	N103	08/17/2009	Non-XML	2008-2009
AMO Mathematics Status	N109	08/17/2009	Non-XML	2008-2009
AMO Reading/Language Arts Status	N111	08/17/2009	Non-XML	2008-2009
Assessment Participation	N081	08/17/2009	Non-XML	2008-2009
CCD School	N129	04/17/2009	Non-XML	2008-2009
Children with Disabilities (IDEA) - Disciplinary Removals	N088	05/28/2009	Non-XML	2008-2009
Children with Disabilities (IDEA) - Early Childhood	N089	11/19/2008	Non-XML	2008-2009
Children with Disabilities (IDEA) - Exiting Special Education	N009	08/17/2009	Non-XML	2008-2009
Children with Disabilities (IDEA) - School Age	N002	11/19/2008	Non-XML	2008-2009
Children with Disabilities (IDEA) - Suspensions/Expulsions	N006	05/28/2009	Non-XML	2008-2009
Children with Disabilities (IDEA) - Total Disciplinary Removals	N143	05/28/2009	Non-XML	2008-2009
Children with Disabilities (IDEA) Academic Achievement	N003	08/17/2009	Non-XML	2008-2009
Children with Disabilities (IDEA) Alternate Assessment Caps	N146	05/28/2009	Non-XML	2008-2009
Children with Disabilities (IDEA) Not Participating in Assessments	N004	08/17/2009	Non-XML	2008-2009
Children with Disabilities (IDEA) Participation in Assessments	N093	08/17/2009	Non-XML	2008-2009
Children with Disabilities (IDEA) Reasons for Unilateral Removal	N007	08/17/2009	Non-XML	2008-2009
Children with Disabilities (IDEA) Removal to Interim Alternative Educational Setting	N005	08/17/2009	Non-XML	2008-2009
Computer	N028	11/19/2008	Non-XML	2008-2009
Corrective Actions	N152	08/17/2009	Non-XML	2008-2009

Clicking on the name of a file specification will display the *File Specification Document Links page* (Figure 9-9), which contains a link to the most current version of the file specification for that year. To view the specification, click on the ***Current Version*** link at the bottom of the page. This will open the file specification in a pop-up window.

Figure 9-9: File Specification Document Links



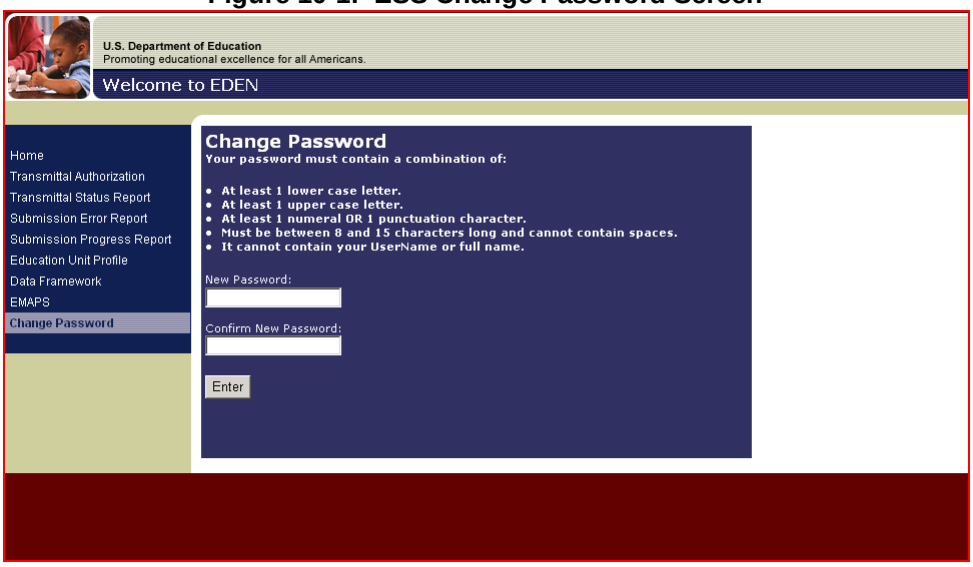
10 CHANGING PASSWORDS

10.1 How to Change Passwords

Please Note: Department of Education users will use their network password, and should contact EDUCATE in order to have their password reset.

For security reasons, state users are encouraged to change their password as soon as possible after they receive their initial password assignment from ED. (As mentioned below, passwords must age at least 24 hours.) To initiate a password change, click on ***Change Password*** on the navigation bar. This will display the Change Password screen (Figure 10-1).

Figure 10-1: ESS Change Password Screen



Type the new password in the ***New Password*** window, then re-type the new password in to ***Confirm New Password*** window and click on the ***Enter*** button.

The following are ED rules for passwords:

- Maximum password age is 90 days. Users will be prompted to change their password once it has expired.
- Minimum password age is 24 hours. This means that when you change your password, you must wait at least 24 hours before you can change it again.
- Password uniqueness - The system will remember the previous five passwords. This means that a user will not be able change their password and then automatically change back to the original password.
- Minimum password requirements – The password must be at least 8 characters, but not more than 15 characters. The password must not contain your user name or any part of your full name. Passwords are also not allowed to include any spaces.

The new password also must contain a mix of characters from the four types listed below. It must contain at least three of the types, but it can contain all four types.

- Passwords must contain characters from at least three of the following four types:
  - One or more English upper case letter (A through Z).
  - One or more English lower case letter (a through z).
  - One or more Arabic numerals (0 through 9).
  - One or more "special characters", such as (% @ # & $ *).
- Examples of Valid Passwords and why they are correct:
  - King1Queen (contains Uppercase, Lowercase, and Numeral).
  - King&Queen (contains Uppercase, Lowercase, and Non-alphanumeric).
  - MyDogSkip99 (contains Uppercase, Lowercase, and Numeral).
  - G0NEF1$H1NG (contains Uppercase, Numeral, and Non-alphanumeric).
  - out2lunch% (contains Lowercase, Numeral, and Non-alphanumeric).
  - L84Work2 (contains Uppercase, Lowercase, and Numeral).

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