

Tom Corbett
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PIMS ADMINISTRATORS

REFERENCE GUIDE

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PENNSYLVANIA INFORMATION MANAGEMENT SYSTEM

Welcome to the PIMS team! PIMS, which is an acronym for the Pennsylvania Information Management System, can be challenging. This primer, along with the support of the team at PDE and PIMS Support Services, is designed to assist Local Security or PIMS Application Administrators with overcoming these challenges. More detailed information is available in the PIMS Manuals, eScholar Data Manager™ v3.0 PIMS Application User's Guide, and other documents posted on the PIMS Website at www.education.state.pa.us.

PIMS

OVERVIEW

PIMS is a longitudinal data system (or data warehouse) that the Pennsylvania Department of Education (PDE) uses to collect student, staff, course, and other data from school districts and other local education agencies (LEAs) such as; charter schools, intermediate units, and career and technical centers.

PIMS data is used by PDE to send mandated reports to the federal government and to evaluate Pennsylvania programs. The collection of PIMS data replaces the annual collection of many separate reports by various PDE departments.

PIMS SECURITY

The data collected in PIMS contains confidential information; therefore, to preserve the confidentiality of this data, secure access is required. The PDE Web Portal is the secure gateway to the PIMS applications. The PIMS applications secure access is designed to have

the PIMS Local Security Administrator or PIMS Application Administrator assign users to groups and to associate users with an institution.

There are four types of application security groups within the Web Portal.

📖 Local Security Administrator – The Local Security Administrator group is administered by PDE.

- Responsibilities:
 - Overall Security of the Web Portal for the Institution
 - Administering the Local Application Administrator
 - Administering all Lower Groups in the Hierarchy

📖 Local Application Administrator –

- Responsibilities:
 - Primarily Administering the Application Administrators
 - Administering all Lower Groups in the Hierarchy

📖 Application – Local Administrator –

- Each PDE application will have an Application – Local Administrator group
- Responsible for Administering the Application Groups
 - Example: PIMS – Local Administrator

📖 Application Group -

- Membership in an Application Group provides access to the Application
- Different Groups can Perform Different Functions within the Application

PIMS ACCESS

PIMS data includes confidential information; therefore, a PDE log in and access to a PIMS

Group is required to access PIMS and PIMS Reports. The PDE log in is created by completing and submitting the PDE USER REGISTRATION form. The PDE USER REGISTRATION is required for PIMS application access and INITIAL SECURITY SETUP for the LEA.

INITIAL SECURITY SETUP

An Initial Security Setup is required for new LEAs and an LEA without a Local Security Administrator. The process for INITIAL SECURITY SETUP is:

1. Complete PDE USER REGISTRATION
2. Submit Support Ticket – Request Local Security Administrator Access for the Institution
3. Send Authorization Email to PDE – Must be submitted by the Chief School Administrator for the LEA
4. PDE Reviews Request – PDE may contact the Chief School Administrator for the LEA

PDE USER REGISTRATION

The first step to accessing PIMS or PIMS Reports is to create a PDE Web Portal log in. The USER REGISTRATION must be completed prior to requesting access for any application security group. Follow the instructions below for creating a PDE Web Portal log in:

1. Navigate to www.education.state.pa.us
2. Click REGISTER



The REGISTRATION screen displays.

1. Complete Form
 - a. All fields with a red asterisk (*) are required fields
2. Click REGISTER

The screenshot shows the 'Register' form on the Pennsylvania PDE Web Portal. The form includes the following fields: Name Prefix (dropdown), First Name (text), Last Name (text), Name Suffix (dropdown), Category (dropdown), Title (text), Address1 (text), Address2 (text), City (text), State (dropdown), Zip (text), Phone (text), Fax (text), Email Address (text), User ID (text), Password (text), Confirm Password (text), and Questions (text). A red asterisk (*) is placed to the right of each required field. A red arrow labeled '1' points to the top of the form, and another red arrow labeled '2' points to the 'Register' button at the bottom right. A legend at the bottom right indicates that a red asterisk (*) denotes a required field.

When the request is received by PDE and access is granted, an email is sent to the email address submitted during the USER REGISTRATION process. Therefore, it is vital the email address is accurate.

Once the USER REGISTRATION confirmation email is received, log in to the PDE Web Portal with the USERID and PASSWORD created during the registration process. The USER PROFILE screen must be reviewed and saved before the Local Security Administrator or PIMS Application Administrator can add a user to a group.

SUPPORT TICKET

A SUPPORT TICKET must be submitted when requesting access for a Local Security Administrator. A SUPPORT TICKET should not be submitted if the LEA has a Local Security Administrator.

To submit a SUPPORT TICKET:

1. Go to WWW.EDUCATION.STATE.PA.US
2. Click HELP & SUPPORT



3. Scroll down to HELP & SUPPORT DOCUMENTS

Log In Help	Using Our Site
<p>Log In Help and Tips -Detailed help and tips on how to log into the Pennsylvania Department of Education (PDE) website to access your authorized PDE applications.</p> <p>Change Password, email address or profile information - You can change your password, email address or update your profile information on your user administration page. You will need to log in and then click the 'Update User Account' link.</p> <p>Forgotten Password - If you have forgotten your password you may utilize the forgotten password tool to have a new password emailed to you. Please note that the password will be sent to the email associated with your profile. If the email associated with your profile is incorrect, please submit a Help Desk Support request (see below).</p> <p>Help Desk Support -If you cannot resolve your problem or answer your question through the resources on this page you may open a ticket with our Help Desk. Fill out the request form and a support person will be in contact with you.</p>	<p>Web Browsers: Although we make every effort on this site to accommodate all web browsers, the PDE web site is best viewed with Microsoft Internet Explorer Version 6.0 or higher, at a resolution of 1024x768. Mac users may experience some incompatibility with certain functions within the PDE website when using the Safari browser.</p> <p>Additionally, some internet browsers require that PDE be labeled a Trusted Site for navigation purposes. Please add the following URL to your Trusted Site list: http://www.portal.state.pa.us.</p> <p>Please note that pop-ups must be enabled on your web browser for this site</p> <p>View an overview of our PDE website.</p> <p>Additional Provided Files: In addition to web pages, the PDE website also contains links to files created in Microsoft Word, Excel, PowerPoint and Adobe PDF.</p>

Complete and Submit the Support and Request Form by selecting:

4. Portal Security and Access
5. Security Administrator
6. No Security Administrator at my Institution

AUTHORIZATION EMAIL TO PDE

If an LEA does not have a Local Security Administrator an authorization email must be sent to PDE by the Chief School Administrator for the LEA. The email request must contain the following information for the person selected as the Local Security Administrator for the LEA:

- 📖 Name
- 📖 UserID
- 📖 Title
- 📖 Phone Number
- 📖 Email Address – Must be Valid and Unique

The valid email must also contain the following information for the Chief School Administrator:

- 📖 Name
- 📖 Title
- 📖 Phone Number

Send the email to: RA-edhubadmin@state.pa.us

NOTE: Multiple PIMS users must submit a different email address for each user at the same LEA. PIMS users affiliated with multiple institutions must have a different UserID and email address for each location.

Example: CEO operating multiple Charter Schools

PDE REVIEWS REQUEST

Once the request is submitted, PDE will review the request, and if additional information is required, will contact the Chief School Administrator. An email notification is sent from PDE when the request has been approved, and the person selected as the Local Security Administrator for the LEA has been added to the group.

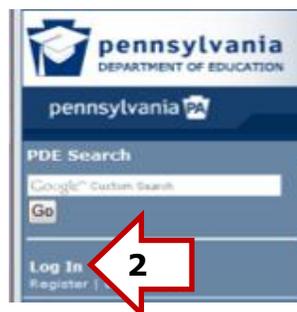
USER PROFILE

A USER PROFILE is required to obtain a PDE log in and to be granted access to PIMS applications. The USER PROFILE information is used by PDE for telephone and email correspondence, which includes; system availability, collection information, security for resetting a password, and other pertinent information. Therefore, it is essential for the USER PROFILE to contain accurate information.

The USER PROFILE screen must be viewed and saved before the Local Security or PIMS Application Administrator can add the user to a group.

To view or update the USER PROFILE:

1. Navigate to www.education.state.pa.us
2. Click LOG IN



3. Click MY PDE
4. Click MY PROFILE



5. Update USER PROFILE
6. Click SAVE



NOTE: PDE and PIMS Support Services cannot update USER PROFILE information.

AUTHORIZATION/ACCESS

The PDE Web Portal is the gateway to access all of PIMS's applications. The initial access to PDE's Web Portal is established through PDE's Help Desk; however, access to a PIMS application, frequently referred to as ADDING A USER TO A GROUP, is established by the Local Security Administrator or the PIMS Application Administrator.

LOCAL SECURITY OR PIMS APPLICATION ADMINISTRATOR

After gaining access to the PDE Web Portal, the LEA's Local Security Administrator or the PIMS Application Administrator must grant access to the PIMS application. Each LEA must have at least one, but preferably two, Local Security Administrators to maintain the security and accuracy of the application through:

- 📖 Add a User to Group – Granting user security access to PDE applications
- 📖 Review Registration Requests – Email to Local Security or PIMS Application Administrator requesting access to a group
- 📖 Delete Users from Groups – Remove user security access to PDE applications

There are two methods of notifying the Local Security Administrator to grant access to a PDE application.

1. Directly notify Local Security or PIMS Application Administrator – PDE Preferred Method
2. Register for a Group – (See PDE Website Help and Support Documents)

GROUP OVERVIEW

There are three (3) components to a Group and there are three (3) Category Types. The components of a Group are:

- 📖 Category Type - Application
- 📖 Group Category – Abbreviation of the Application
- 📖 Group Name – User Role Within the Application

The Category Types are:

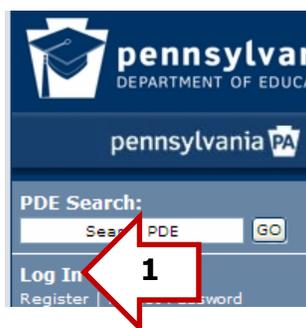
- 📖 Education Directory – Contains Security Administrator groups
 - Security Administrator Types include:
 - Local Security Administrator
 - Local Application Administrator
 - Application Administrator
- 📖 Application – Contains Application Groups (Roles)
 - Group Category – Application Abbreviation
 - Group Name – Application Role
- 📖 Portal Community – Groups Associated with Education Communities

LOCAL SECURITY OR PIMS APPLICATION ADMINISTRATOR – ADD USERS TO GROUPS

The Local Security Administrator or the PIMS Application Administrator can add a user to a group after the user has obtained a PDE log in.

To add a user to a group:

1. Log in to the PDE Web Portal



2. Click My PDE
3. Click USER/GROUP ADMINISTRATION



NOTE: If USER/GROUP ADMINISTRATION is not displayed, access was not granted by the Local Security Administrator to a Security Administration Group.

The MY ADMINISTRATIVE GROUPS screen displays.

To search for a group:

1. Enter KEYWORDS
2. Click SEARCH

Home >> My PDE >> User/Group Administration >> Groups

Groups



To view current members or to add new members to a group:

3. Click MANAGE USERS

Category Type	Group Category	Group Name	Description	
Education Directory	Chief Administrator	Chief	The chief executive officer and primary advisor to the board of education	Info Edit Group Manage Users
Education Directory	Chief Administrator	Future Chiefs	Future chief executive officer and primary advisor	Info Edit Group Manage Users

The MANAGE GROUP MEMBERSHIPS screen displays. To add a new user to a group:

1. Click ADD EXISTING USER

Manage Group Memberships

Group Information:
 Group Type: Application
 Group Category: Driver Education
 Group Name: DriverEd Local User

Group Memberships:

First Name: Last Name:

User ID: Institution:

There are 4 members.

	User ID	First Name	Last Name	Institution		
<input type="checkbox"/>	vps00000001	John	Smith	CentralHighSchool	Edit	Delete
<input type="checkbox"/>	vps00000002	John	Smith	CentralHighSchool	Edit	Delete
<input type="checkbox"/>	vps00000003	John	Smith	CentralHighSchool	Edit	Delete
<input type="checkbox"/>	vps00000004	John	Smith	CentralHighSchool	Edit	Delete

NOTE: Users can belong to multiple applications, but cannot have multiple roles.

STEP 1 – ADD USERS TO GROUP

The ADD USERS TO GROUP screen is displayed. This is the first of three steps to add a user to a group.

To begin the process:

1. Enter USERID

Or

2. FIRST and LAST NAME
3. Click SEARCH

Or

4. Select ADD from the list of users

Add Users to Group

1 → 2 → 3

Please identify the appropriate user for the group association. Search for the appropriate user below.

Group Information:

Group Type: Application
 Group Category: Driver Education
 Group Name: DriverEd

User Search:

Please enter search criteria in order to display results below.

User ID: First Name: Last Name: Search

Groups: Institutions:

There are 8 users available.

User ID	First Name	Last Name	Group	Institution	
[User ID]	Christopher	Rosing	Content Editor	PDE	Add
[User ID]	Christopher	Rosing	CWOPA User	PDE	Add
[User ID]	Christopher	Rosing	DriverEd Local User	[Redacted]	Add
[User ID]	Christopher	Rosing	IUUser	[Redacted]	Add
[User ID]	Christopher	Rosing	Local Application Administrator	[Redacted]	Add
[User ID]	Christopher	Rosing	Master MyApps Administrator	PDE	Add
[User ID]	Christopher	Rosing	PDE Administrator	PDE	Add
[User ID]	Christopher	Rosing	PDE Security Administrator	PDE	Add

The Select an Institution screen displays.

STEP 2 - SELECT AN INSTITUTION

The SELECT AN INSTITUTION is the second step in adding a user to a group. There are two

methods to add a user to a group. If the correct institution appears in the USE AN EXISTING EDUCATIONAL INSTITUTION AFFILIATION section:

1. Click SELECT

If there is no institution, or the incorrect institution is displayed, search for NEW EDUCATION INSTITUTION by keyword(s):

2. Enter INSTITUTION NAME
3. Click SEARCH

Locate the institution from the search results:

4. Click SELECT – (NOT SHOWN – Is available when search criteria is displayed)

Select an Institution

① → ② → ③

Please identify an institution for the group association. Select either an existing affiliation, or search for a new institution below.

Current Group Information:

User Name: Christopher Rosing
 Group Type: Application
 Group Category: Driver Education
 Group Name: DriverEd Local User

Use an existing educational institution affiliation:

There are 3 affiliated institution(s) available.

Institution Name	
[Redacted]	Select
[Redacted]	Select
[Redacted]	Select

Or search for a new education institution:

Please enter search criteria in order to display results below.

Search by keyword(s):

Category: County:

The GROUP MEMBERSHIP PROFILE screen displays.

NOTE: If the new user is not located, verify the user has a PDE Web Portal log in, that the user has logged into the PDE Web Portal, and the USER PROFILE was reviewed and saved.

STEP 3 - GROUP MEMBERSHIP PROFILE

The GROUP MEMBERSHIP PROFILE is the final step in the process. This screen provides the ability to add group attributions, if applicable. To finalize the process:

1. Click CREATE MEMBERSHIP

Group Membership Profile

1 → 2 → 3

Please complete the membership by editing the attributes below.

Group Information:

User Name: Christopher Rosina
Group Type: Application
Group Category: Driver Education
Group Name: DriverEd Local User
Institution: University of Pennsylvania

Group Attributes:

There are no attributes defined for this group.

Create Membership Cancel

LOCAL SECURITY OR PIMS APPLICATION ADMINISTRATOR - SEARCH

When the Local Security or PIMS Application Administrator is unknown, but needs to be notified to add a user to a group, or update an email address, a search can be performed from the PDE Web Portal. To conduct a search for the Local Security Administrator(s):

1. Log in to the PDE Web Portal

pennsylvania DEPARTMENT OF EDUCATION

pennsylvania PA

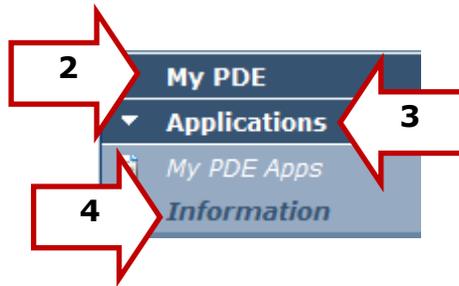
PDE Search:

Search PDE GO

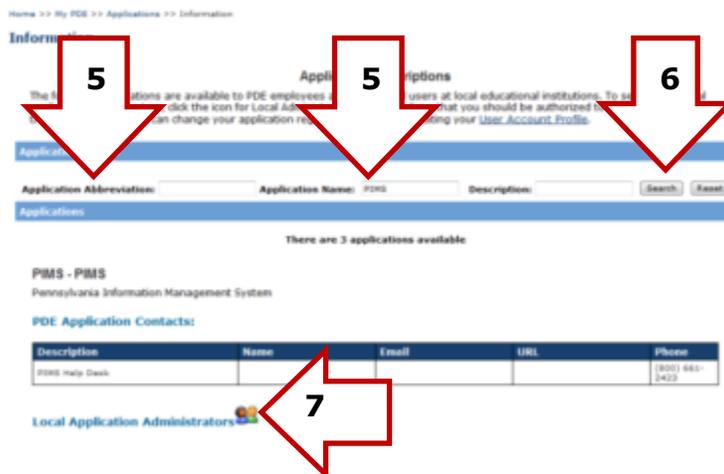
Log In Register word

LOCAL SECURITY OR PIMS APPLICATION ADMINISTRATOR

2. Click My PDE
3. Click APPLICATIONS
4. Click INFORMATION



5. Enter
 - a. APPLICATION ABBREVIATION (PIMS)
 - OR
 - b. APPLICATION NAME (PIMS)
6. Click SEARCH
 7. Click PIMS APPLICATION ADMINISTRATORS



LOCAL SECURITY OR PIMS APPLICATION ADMINISTRATOR

The Security Administrators are displayed. To search for the Local Security or PIMS Application Administrator for a specific LEA:

8. Enter INSTITUTION NAME
9. Click SEARCH

Information

Local Application Administrator(s)

You are currently viewing the local administrators associated with the application that you have selected on the PDE Apps screen. You can search the local administrators by institutions.

Local Application Administrator(s)

Institution Name:

Name	Role	Institution	Email	Phone
Jon Marsh	Local Application Administrator	21st Century Cyber CS	jmarsh@21stcenturycyber.org	(484) 875-5454
Joseph Mayo	Local Security Administrator	21st Century Cyber CS	jmayo@21ccc.org	(484) 237-5266
Jon Marsh	PIMS - Local Administrator	21st Century Cyber CS	jmarsh@21stcenturycyber.org	(484) 875-5454

The list of Local Security or PIMS Application Administrators for the selected LEA is displayed along with contact information. After receiving notification, the Local Security or PIMS Application Administrator can directly add a user to a group.

Local Application Administrator(s)

You are currently viewing the local administrators associated with the application that you have selected on the PDE Apps screen. You can search the local administrators by institutions.

Local Application Administrator(s)

PIMS

Institution Name:

Name	Role	Institution	Email	Phone
Jon Marsh	Local Application Administrator	21st Century Cyber CS	jmarsh@21stcenturycyber.org	(484) 875-5454
Joseph Mayo	Local Security Administrator	21st Century Cyber CS	jmayo@21ccc.org	(484) 237-5266
Jon Marsh	PIMS - Local Administrator	21st Century Cyber CS	jmarsh@21stcenturycyber.org	(484) 875-5454
Scott Bossung	Local Application Administrator	A W Beattie Career Center	scott_bossung@beattitech.com	(412) 366-2800
Joe Miller	Local Security Administrator	A W Beattie Career Center	jmiller@beattitech.com	(412) 366-2800
Scott Bossung	PIMS - Local Administrator	A W Beattie Career Center	scott_bossung@beattitech.com	(412) 366-2800
Susan Hughes	PIMS - Local Administrator	A W Beattie Career Center	shughes@beattitech.com	(412) 366-2800
Kathryn Ingram	PIMS - Local Administrator	A W Beattie Career Center	kingram@beattitech.com	(412) 366-2800
Maryann Huzvar	Local Security Administrator	Aa to Zz Child Care	maryann@beatoz.com	(717) 566-1488
Joanne Drinkard	Local Security Administrator	Hardyark Child Care and Learning Center Inc	hardyark73@aol.com	(610) 358-8998
Kathleen Coleman	Local Security Administrator	Abington Friends School	kcoleman@abingtonfriends.net	(215) 576-3984

ESCHOLAR DATA MANAGER

eScholar Data Manager™ (eDM), otherwise known as PIMS, is a secure web interface that manages and controls data as it moves through the data Extract, Transform, and Load (ETL) process; or commonly referred to as uploading templates into PIMS. eDM validates specific data submitted in the templates through up-front edits that are pre-determined by PDE.

Templates are files that load data into the PIMS data warehouse. Template specifications as detailed in the PIMS USER MANUAL, VOLUME 1, define the fields required for each file submitted to PIMS. The data for the templates is extracted and uploaded into PIMS by the Local Security or PIMS Application Administrator.

NOTE: PIMS templates are also referred to as files or template files.

There are four methods to create PIMS template files:

1. Student or Staff Information System (Source System) – The software application purchased by the LEA from a software vendor to extract the templates identified in the PIMS USER MANUAL, VOLUME 1.
2. LEA Database - Extract or Export Data in the correct format as indicated in the PIMS USER MANUAL, VOLUME 1.
3. PIMS Access Database – Data-entry tool provided by PDE to create template files after data is entered into the PIMS Access Database.
4. Excel® Spreadsheet or Text Editor – Create PIMS templates manually.

NOTE: Prior to creating or editing PIMS template files in Excel®, contact PIMS Support Services at 1-800-661-2423.

PIMS TEMPLATE NAMES

The PIMS template name is required to be in the following format; AUN_TARGETTABLE_YYYYMMDDHHMM.xxx. The template name format provides the following information:

1. AUN - The 9-DIGIT ADMINISTRATIVE UNIT NUMBER given to the LEA by PDE.
2. TARGET TABLE - The name of the template. This can be found at the beginning of the TEMPLATE SPECIFICATION in PIMS MANUAL VOLUME 1.
3. TIME AND DATE FORMAT YYYYMMDDHHMM is the 4-DIGIT YEAR (YYYY), 2-DIGIT MONTH (MM), 2-DIGIT DAY (DD), 2-DIGIT HOUR (HH) AND 2-DIGIT MINUTE (MM).
4. xxx - FILE EXTENSION
 - a. SOURCE INFORMATION SYSTEM FILE - Typically a TAB DELIMITED (.TAB) FILE
 - b. PIMS ACCESS DATABASE or EXCEL[®] SPREADSHEET - Should be a COMMA DELIMITED (.CSV) FILE.

An example of a file name in:

 TAB DELIMITED FORMAT - 999999999_STUDENT_201103151134.TAB

 COMMA DELIMITED FORMAT - 999999999_STUDENT_201103151134.CSV

NOTE: See HOW TO MANUALLY EDIT A CSV TEMPLATE FILE WITHOUT LOSING FORMATTING document, which is located on PDE Website, PIMS Documents folder, for files created by hand.

DUPLICATE FILE NAME

Each file that is uploaded to PIMS must have a unique file name; therefore, the same file cannot be uploaded twice. For example, the first file uploaded has the unique file name of

999999999_STUDENT_201207121139. If the same file is uploaded again, the file name needs to be revised or the file upload will fail. To prevent the file from failing for a duplicate file name, the MMDDHHMM section of the file name could be changed to: 999999999_STUDENT_201207151245.

FILE NOT PART OF SUBMISSION

If a file that is not part of the DATA SUBMISSION period is uploaded, the PIMS application will generate the FILE NOT PART OF SUBMISSION PERIOD error. If this error is generated, change the DATA SUBMISSION drop-down to the correct submission. If necessary, click HOME to verify which files are available for the data collection submission period.

PIMS TEMPLATE UPLOAD

The upload of the data collection templates begins with the submission of data to PDE. There are three sections to the PIMS template upload process.

1. PIMS HOME PAGE - List the data collections that are open for data submission

PIMS, through eDM, uploads templates in two steps:

2. FILE MANAGER – Templates were successfully uploaded and edits applied, possible errors
3. BATCH MANAGER – Files that passed File Manager edits, are batch processed, and additional edits applied, possible errors
 - a. A batch may consist of 1 template or multiple templates
 - b. A batch with multiple templates must be:
 - i. For the same collection
 - ii. Loaded in proper sequence (See *PIMS User Manual, Volume 1*)

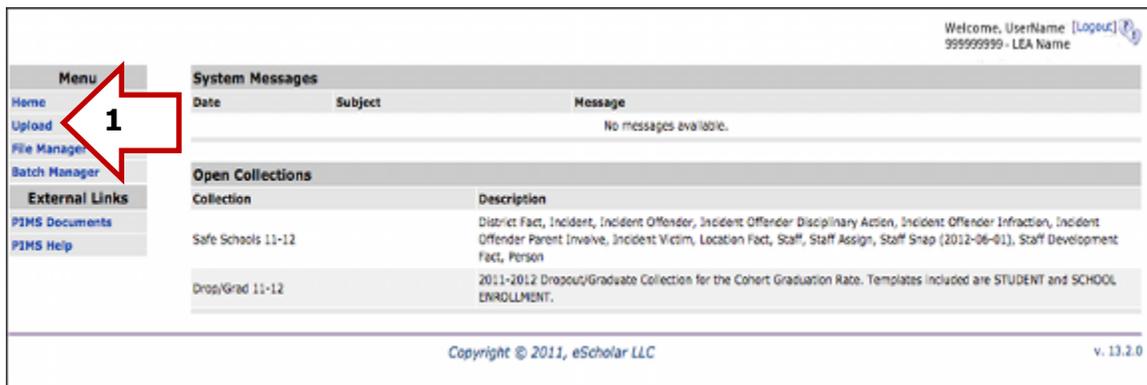
HOME PAGE

The PIMS HOME page is where the process of submitting data begins. The HOME page includes the:

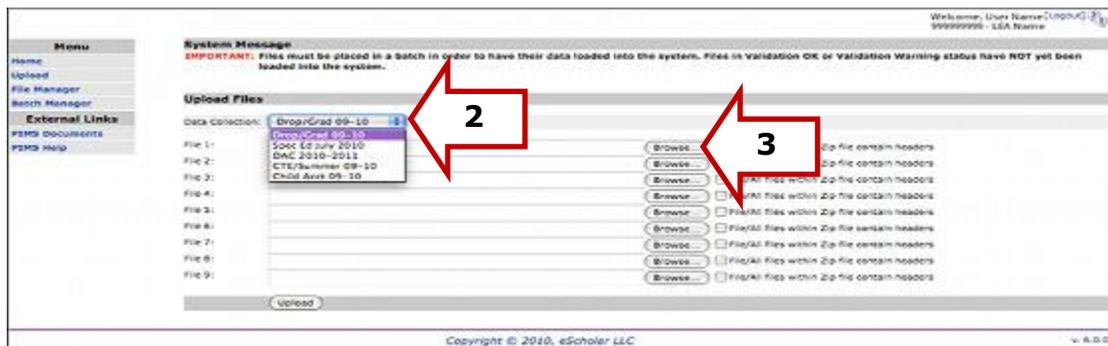
- 📖 Menu
- 📖 External Links
- 📖 System Messages
- 📖 Open Collections

To begin the process of uploading the PIMS templates, from the left menu bar:

1. Click UPLOAD



2. Select a DATA COLLECTION
3. Click BROWSE to locate the file



4. Click the FILE/ALL FILES WITHIN ZIP FILE CONTAIN HEADERS (Only if file contains a header row)
5. Click UPLOAD



If no errors are detected, the file is automatically moved to the FILE MANAGER.

If errors are detected, error messages will appear in:

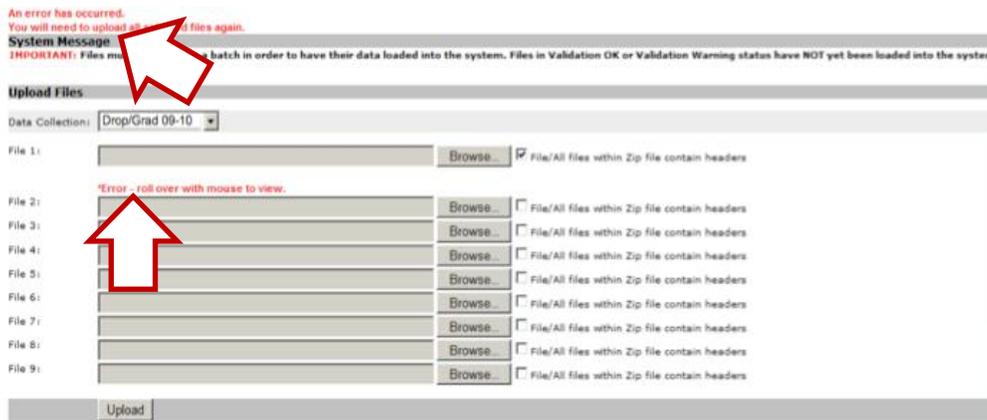
- 📖 SYSTEM MESSAGE FIELD
- 📖 Above SYSTEM MESSAGE FIELD
- 📖 Above FILE NAME

The most common errors are:

- 📖 File Name Incorrect
- 📖 File Name Duplicated
- 📖 File is not part of selected Data Collection

NOTE: Templates must be uploaded in the order specified in the PIMS USER MANUAL VOLUME 1.

The SYSTEM MESSAGE indicates the error, unless the file has advanced to the FILE MANAGER. The error message above the SYSTEM MESSAGE field indicates an error occurred and the selected files need to be corrected and uploaded again. A message will also display above the file with errors. Files with errors are indicated by the message above the file name. The message states: *Error – roll over with mouse to view.*



The errors must be corrected before the file can be uploaded and moved to the File Manager.

NOTE: To maintain data accuracy and consistency, correct data in Student or Staff Information System prior to re-uploading the data file.

FILE MANAGER

The FILE MANAGER is the next step in the eDM (PIMS) process. The FILE MANAGER validates the structure of the file including:

1. PAMSecureIDs
2. Snapshot Date
3. District Codes (File – Column A)
4. Various Code Sets

A file that successfully uploads will automatically move to the FILE MANAGER. The status of the file, indicated below, will change as it is processed through the FILE MANAGER.

FILE STATUS	ICON	DEFINITION
RECEIVED		File Received Validation in Process
VALIDATION OK		Validation Complete No Errors Ready for Batch Processing
VALIDATION WARNING		File Contains Errors, but less than the Threshold Records in Error Removed from the File Remaining Records can be Processed
VALIDATION FAILED		File Contains more Errors than the Threshold File cannot be Processed

The FILE MANAGER screen displays with the RECEIVED status icon. This is the first status in the FILE MANAGER process. The file will remain in the RECEIVED status until the FILE MANAGER validations are processed.

NOTE: To verify the file has completed processing through the FILE MANAGER, the screen must be refreshed.

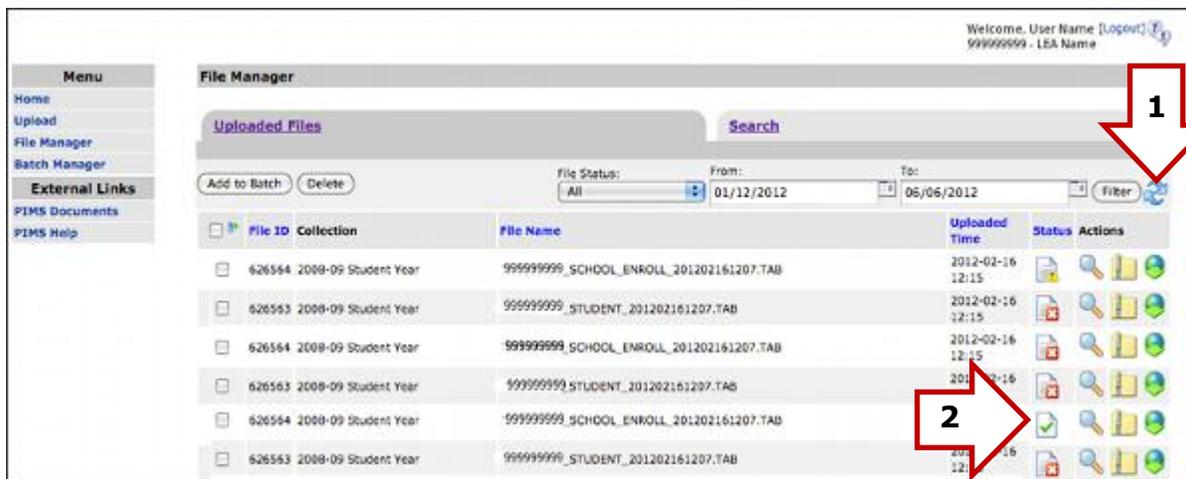
The status of the file does not automatically change when the validation process is complete. To update the status:

1. Click REFRESH  to view status changes

When the file has completed processing through the FILE MANAGER, and if has passed all of the PDE required validations, the VALIDATION OK icon will appear in the STATUS column:

2. VALIDATION OK  indicates the file processed correctly, no errors were found

The file is ready to be added to a BATCH.



The screenshot shows the 'File Manager' interface. At the top right, it says 'Welcome, User Name [Logout] 99999999 - LEA Name'. Below this is a search bar and a 'Filter' button with a refresh icon, indicated by a red arrow labeled '1'. The main area contains a table with columns: File ID, Collection, File Name, Uploaded Time, Status, and Actions. The table lists several files with their respective IDs, collection names, file names, and upload times. The 'Status' column for the last row shows a green checkmark icon, indicated by a red arrow labeled '2'. The 'Actions' column for each row contains icons for file operations like download, delete, and refresh.

If the file failed some of the validations, a validation warning icon will appear in the status field. The failed icon will appear in the status if the file contains more errors than the limit designated by PDE.

NOTE: PDE recommends deleting the files with a warning or failed status and re-submitting, after the records with errors are corrected in the Source System.

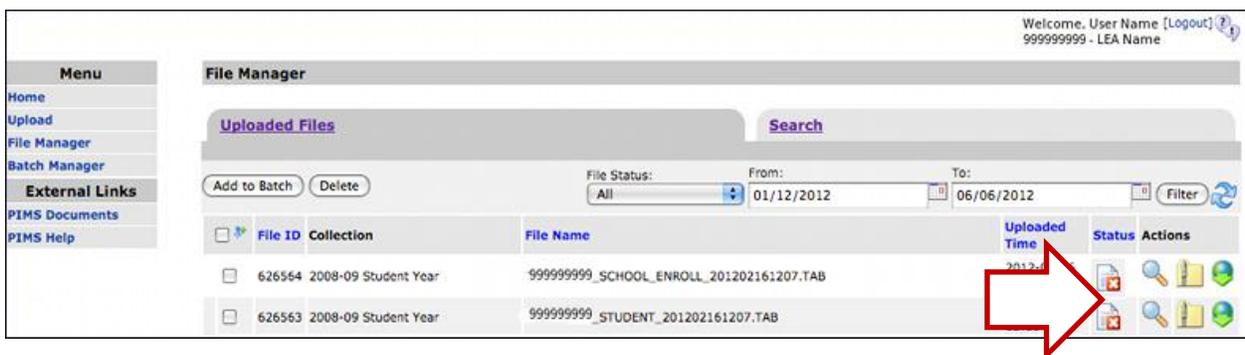
VALIDATION WARNING

A VALIDATION WARNING indicates the file contains some errors but the errors are less than the threshold set by PDE. The file can be added to a batch, but the errors that caused the warnings are removed from the file. The records with errors need to be corrected and re-submitted to PIMS.



VALIDATION FAILED

A VALIDATION FAILED icon indicates the file contains more errors than the threshold set by PDE. The file cannot be processed as a batch. The file must be corrected and re-submitted to PIMS before it can be added to a batch.

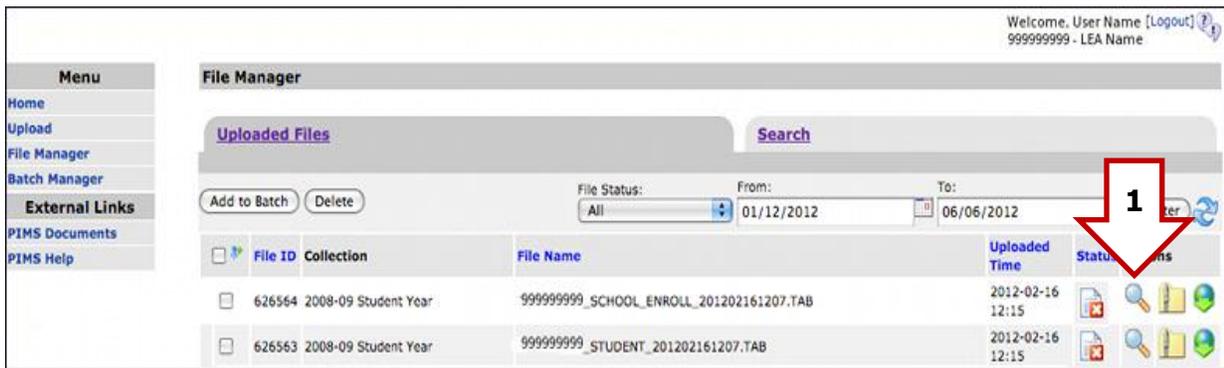


VIEW FILES

The file contents need to be viewed to determine the errors when a VALIDATION WARNING or VALIDATION FAILED icon is displayed.

To view files:

1. Click VIEW 



Welcome, User Name [Logout] ?
99999999 - LEA Name

Menu

- Home
- Upload
- File Manager
- Batch Manager

External Links

- PIMS Documents
- PIMS Help

File Manager

Uploaded Files [Search](#)

Add to Batch Delete

File Status: All From: 01/12/2012 To: 06/06/2012

File ID	Collection	File Name	Uploaded Time	Status	Actions
626564	2008-09 Student Year	999999999_SCHOOL_ENROLL_201202161207.TAB	2012-02-16 12:15	Failed Validation	View File Content
626563	2008-09 Student Year	999999999_STUDENT_201202161207.TAB	2012-02-16 12:15	Failed Validation	View File Content

The page defaults to the GENERAL INFORMATION screen.

2. Click VALIDATION INFORMATION

File Details - File ID: 216552; File Name: 103024603_STUDENT_200906120254.CSV

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

General Information

Filename: 103024603_STUDENT_200906120254.CSV

Associated Template: STUDENT

File ID: 216552

Batch ID: N/A

Uploaded Time: 2009-07-07 14:22

Header Record Present: Yes

Delimiter: ,

File Status: Failed Validation 

Uploaded By: c-dgross

Uploaded Time: 2009-07-07 14:22

Uploaded Via: HTTP

Last Modified By: c-dgross

Last Modified Time: 2009-07-07 14:22

Archived: No

Archived Time:

Source File

File Type	File Name	Records	Last Modified Date	View File Content
Source File	103024603_STUDENT_200906120254.CSV	51	2009-07-07 14:22	

Add to Batch Delete Cancel

reported in the wrong column.

To correct the error(s):

1. Verify SOURCE FILE is in correct format
2. Correct errors and warnings in the SIS
3. Extract the corrected file and upload to PIMS

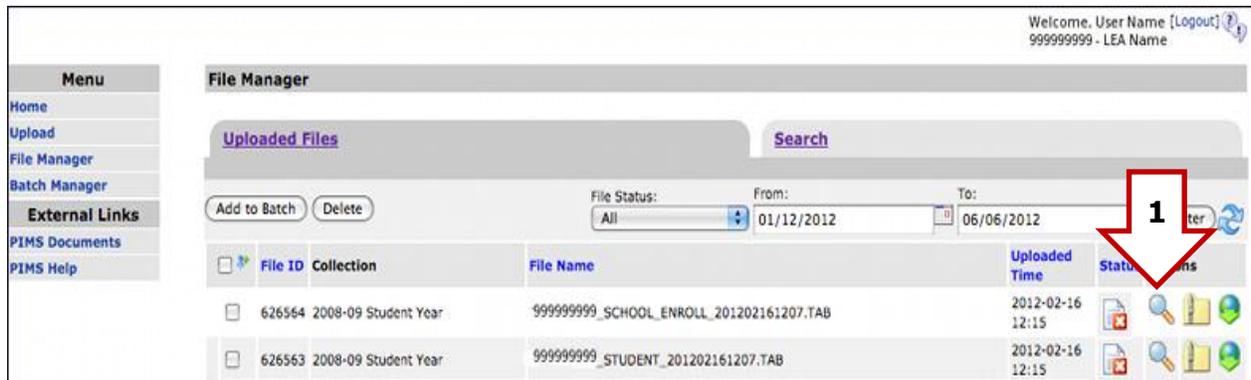
NOTE: The viewing screen is limited to 100 records. Files over 100 records need to be downloaded to view the entire list of errors.

DOWNLOAD FILE ERRORS

If the file has over 100 errors, the file will need to be downloaded to view the complete list of errors.

To download the file:

1. Click VIEW 



The page defaults to the GENERAL INFORMATION screen.

2. Click VALIDATION INFORMATION

File Details - File ID: 216552; File Name: 103024603_STUDENT_200906120254.CSV

General Information | **Validation Information**

Filename: 103024603_STUDENT_200906120254.CSV
 Associated Template: STUDENT
 File ID: 216552
 Batch ID: N/A
 Uploaded Time: 2009-07-07 14:22
 Header Record Present: Yes
 Delimiter: ,
 File Status: Failed Validation 
 Uploaded By: c-dgross
 Uploaded Time: 2009-07-07 14:22
 Uploaded Via: HTTP
 Last Modified By: c-dgross
 Last Modified Time: 2009-07-07 14:22
 Archived: No
 Archived Time:

Source File

File Type	File Name	Records	Last Modified Date	View File Content
Source File	103024603_STUDENT_200906120254.CSV	51	2009-07-07 14:22	

3. Scroll to FILE CONTENTS

4. Locate ERROR.ZIP

a. View number of RECORDS IN ERROR, ERRORS and WARNINGS

5. Click VIEW FILE CONTENT 

File Details - File ID: 216552; File Name: 103024603_STUDENT_200906120254.CSV

General Information | **Validation Information**

Validated Time: 2009-07-07 14:20
 Validation Time: 2009-07-07 14:20
 Total Time: 2.467 seconds
 Number of Applied Validations: 52

File Contents

File Type	File Name	Records	Last Modified Date	View File Content
Source File	103024603_STUDENT_200906120254.CSV	51	2009-07-07 14:22	
File	Records in Error	Errors		
error.zip	51	58		

The FILE CONTENT screen displays in a view similar to an Excel® spreadsheet.

ADD TO BATCH

Once the file has uploaded successfully in the FILE MANAGER, the file can be added to a BATCH. A BATCH may contain one file or multiple files.

NOTE: Files must have a status of VALIDATION OK or VALIDATION WARNING to be added to a BATCH.

To add a file to BATCH:

1. Select the File(s)
2. Click ADD TO BATCH



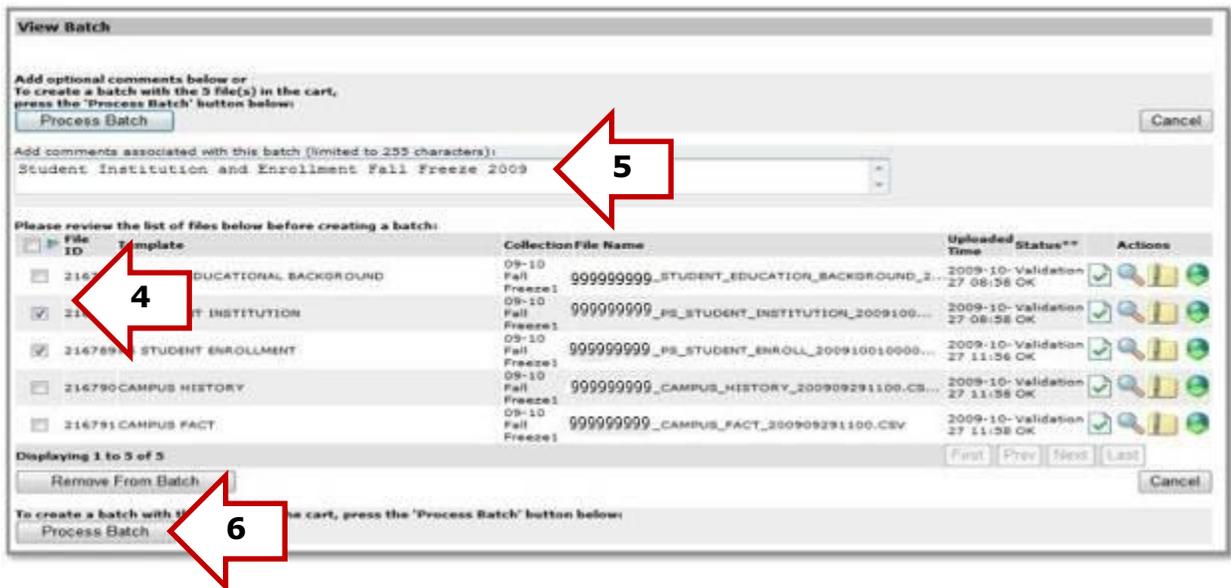
The BATCH can be viewed after the screen refreshes.

3. Click VIEW BATCH



The VIEW BATCH screen displays:

4. Select FILE(S)
5. Add BATCH COMMENTS
6. Click PROCESS BATCH



The BATCH MANAGER screen displays.

NOTE: Add a BATCH COMMENT to make searching for batches easier.

BATCH MANAGER

The BATCH MANAGER checks the contents of the data for validity and dependencies when loading the data into the PIMS Data Warehouse. Files added to a BATCH from the FILE MANAGER screen are processed by the BATCH MANAGER.

Currently, the BATCH MANAGER checks:

-  Required Dependencies – i.e. Student ID not in Student table
-  Various Code Sets – i.e. CIP Codes or State Course Codes
-  Other Validations – i.e. Location Codes of Residence or District Code of Residence

As the files are processed by the BATCH MANAGER the status of the files are indicated by the following icons.

BATCH STATUS	ICON	DEFINITION
READY TO PROCESS		Indicates a Waiting or Queued Status
PROCESSING		Batch Processing
COMPLETE		Processing Complete No Errors Detected
COMPLETE WITH WARNINGS		Processing Complete Load Plan Warnings Generated All Records Loaded

COMPLETE WITH ERRORS		Processing Complete Data Errors Found Records Not Loaded Review Errors
FAILED		Processing Failed System Error – Report to PIMS Support Services

When a file is first added to a BATCH, the file is in the READY TO PROCESS or PROCESSING status. To update the processing status of the file click REFRESH. The VALIDATION OK (green checkmark) indicates the file processed correctly.

NOTE: Files with errors that were removed in File Manager are not included in BATCH PROCESS. The files with errors in FILE MANAGER need to be corrected in the SOURCE SYSTEM, and re-submitted to PIMS.

COMPLETE WITH WARNINGS

There are three categories of warnings in BATCH MANAGER:

1. WARN CHILD ACCOUNTING – Indicates PIMS School Calendar Instructional Minutes Not Between 150 and 240.
 - a. Correction –
 - i. Verify the minutes are correct

2. WARN STAFF – Indicates Course Instructor template has instructors who were not uploaded in the Staff template
 - a. Correction –
 - i. Upload Staff template with instructors in the Course Instructor template
 - ii. Verify Course Instructor and Staff templates have correct PPIDs
3. WARN STUDENT – A record in the Student or Student Snapshot template has a different Last Name and Birth Date with an associated PAMSecureID that already has a record in the PIMS Warehouse
 - a. Correction -
 - i. Verify the PAMSecureID has the correct name and date of birth

COMPLETE WITH ERRORS

VALIDATION ERRORS are generated when the file contains more errors than the maximum set by PDE. A batch with the status of VALIDATION ERROR cannot be processed. The file must be corrected in the Source System and re-submitted to PIMS.



NOTE: COMPLETE WITH ERRORS does not indicate ALL of the files have errors. Individual files without errors may have processed and were inserted into the data warehouse.

COGNOS®

COGNOS, also known as PIMS Reports, is the application used to generate validation, production, and ACS reports. The reports are used to:

-  Verify and Validate Data Submitted to PIMS
-  Review Data in Production prior to Publication
-  Generate the Accuracy Certification Statement (ACS)

NOTE: A signed ACS verifies the data submitted to PIMS is accurate and final to the best of the LEA's ability.

The COLLECTION and the related COGNOS folder for the PIMS reports are listed below.

COLLECTION

COGNOS® FOLDER

 Access for ELLs/End of Year	 LEP Reports
 Child Accounting	 Child Accounting Reports
 Course	 Course Reports
 CTE	 CTE Reports
 Graduate, Dropout, Cohort	 Graduation and Dropout Reports
 HQT	 HQT Reports
 October Student Enrollment	 Enrollment Reports
 PATI	 Low Income Reports
 Precode or PSSA Refresh	 PATI
 Safe Schools	 Precode Reports
 Special Education	 Safe Schools
 Staff	 Special Education Reports
	 Staff Profile Reports

FAQ'S

Q: Why do I get the *SQL 121 Error* when trying to run a report? Actual Error reads: An error occurred while performing operation 'sqlPrepareWithOptions' status='-121'.

A: Cognos has a refresh period two times a day. When an attempt to run a report during a refresh the *SQL 121 Error* is displayed. Sometimes the report will just spin or it might display another SQL error.

NOTE: The refresh occurs twice a day - once from noon to 2:00p.m., and again at 5:00 a.m.

Q: Why do I get the *3rd Party Provider Encountered an Unrecoverable Exception* error when I try to log into Cognos?

A: The *3rd Party Provider* error is a time out issue. Shut down the browser completely and then re-launch it. Then log back into the PDE Website and then back into Cognos.

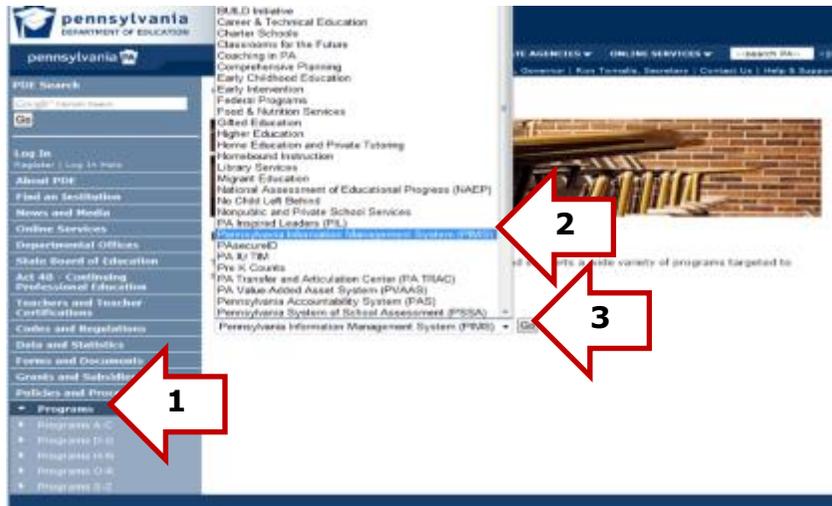
NOTE: If Cognos®, PDE applications, or the PDE Website is left idle for several minutes, an error message is displayed.

PIMS USER MANUAL AND TRAINING GUIDES

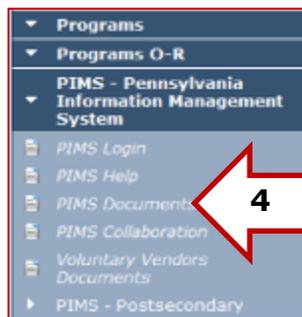
The PIMS USER MANUALS and TRAINING GUIDES provide information on PIMS Collections, template requirements, and PIMS Reports. The USER MANUALS and TRAINING GUIDES are located on the PDE Website www.education.state.pa.us.

To locate the documents:

1. Click PROGRAMS
2. Select PENNSYLVANIA INFORMATION MANAGEMENT SYSTEM (PIMS)
3. Click Go



4. Click PIMS DOCUMENTS



Select the folder icons to view the documents associated with the folder name. It is highly recommended to view the PIMS USER MANUALS, the PIMS HOW TO GUIDES AND TRAINING DOCUMENTS, and the PIMS WEBINARS.

PIMS Documents

This document repository is provided for all documents concerning the PIMS Program. Please select the folder you wish to browse below. You will need to use your browser's "Back" button to return to this page.

PIMS Document Folders	
Name	
 ACS Logs	
 Career and Technical Education	
 HQT	
 Latest PIMS Docs	
 PATL Survey	
 PDE Data Policy	
 PIMS Archived Documents	
 PIMS DataBases	
 PIMS How to Guides & Training Docs	
 PIMS Manuals	
 PIMS Memos and Announcements	
 PIMS PostSecondary	
 PIMS Reporting Dates	
 PIMS Webinars	

NOTE: The PIMS Question & Answer Webinar schedules are located on the PIMS Main page and the Documents page.

PIMS USER MANUALS

The PIMS USER MANUALS contain the information necessary for creating and submitting complete and accurate PIMS collection templates. The PIMS USER MANUAL is comprised of two volumes. VOLUME 1 consists of template details and VOLUME 2 contains the appendices referenced in VOLUME 1.

VOLUME 1

The beginning of the PIMS USER MANUAL VOLUME 1 includes general information such as:

-  Pennsylvania Department of Education Administration
-  Public Education Department PIMS Team
-  PIMS User Manual Change Summary – Volume 1 and Volume 2
-  Students to be Reported in PIMS
-  Staff to be Reported in PIMS
-  Race/Ethnicity: Federal Race and Ethnicity Standards
-  Templates
-  Extracting Data into Template Format
-  Data Manager (eDM)

In addition, the manual provides template specifications and detailed information for each template listed in a PIMS Collection.

- | | |
|--|---|
|  Child Accounting Domain |  Location Domain |
|  Course and Grades Domain |  Survey Domain |
|  Discipline Domain |  Staff Domain |

 District Domain

 Student Domain

 Enrollment Domain

 Career and Technical Education (CTE) Domain

 Groups and Programs Domain

 Special Education Domain

FAQ's

Frequently Asked Questions (FAQ's) are located after each template specification in a collection. In addition, guidance on extracting data into template format and a web link to detailed documentation on DATA MANAGER is provided at the end of THE PIMS USER MANUAL VOLUME 1.

VOLUME 2

The appendices that are referenced in the PIMS USER MANUAL VOLUME 1 are located in the PIMS USER MANUAL VOLUME 2. This includes everything from APPENDIX A – COURSE CODES to APPENDIX AC – PROGRAM PROVIDER TYPE CODES. The codes in the PIMS USER MANUAL VOLUME 2 must be used where indicated in the template specifications listed in the PIMS USER MANUAL VOLUME 1.

PIMS HOW TO GUIDES AND TRAINING DOCUMENTS

The PIMS HOW TO GUIDES and TRAINING DOCUMENTS folder contains a collection of resources that are often overlooked. The various documents provide guidance pertaining to PIMS that can be viewed on-line or downloaded to a computer.

The screen displays:

1. Document Format
2. Document Name
3. Date and Time Created
4. Download Document Icon



Document Name	Created
 2010-11 Staff Report Guide.pdf 2010-11 PIMS Professional Staff Report Guide (Properties)	2/25/11 6:00 PM
 2011 PIMS Professional Staff Webinar for New Submitters.pdf 2011 PIMS Professional Staff Webinar for New Submitters (Properties)	3/2/11 9:21 AM
 2011 PIMS Professional Staff Webinar Part I.pdf 2011 PIMS Professional Staff Webinar Part I (Properties)	3/2/11 9:21 AM
 2011 PIMS Professional Staff Webinar Part II.pdf 2011 PIMS Professional Staff Webinar II (Properties)	3/2/11 9:21 AM
 Cognos Report Primer.pdf Cognos Staff Verification Reports	11/2/10 11:00 AM

NOTE: Click document name to view without downloading document.

EMAIL

PDE frequently communicates with LEAs through emails. Therefore, it is extremely important for the Local Security or PIMS Application Administrator to maintain email addresses in the PDE Web Portal. Accurate email addresses ensure essential information is received.

Emails inform LEAs of:

- 📖 Collection Dates
- 📖 Missing Information
- 📖 Data Errors
- 📖 Webinars
- 📖 Updated/Revised Documents
- 📖 PIMS Maintenance

Local Security or PIMS Application Administrators can maintain email addresses through the PDE Website.

1. Go to WWW.EDUCATION.STATE.PA.US
2. Click HELP & SUPPORT



3. Scroll down to HELP & SUPPORT DOCUMENTS
4. Click Document Name to View



5. Click HELP DESK SUPPORT

NOTE: This is not PIMS Support Services.

Log In Help	Using Our Site
<p>Log In Help and Tips - Detailed help and tips on how to log into the Pennsylvania Department of Education (PDE) website to access your authorized PDE applications.</p>	<p>Web Browsers: Although we make every effort on this site to accommodate all web browsers, the PDE web site is best viewed with Microsoft Internet Explorer Version 6.0 or higher, at a resolution of 1024x768. Mac users may experience some incompatibility with certain functions within the PDE website when using the Safari browser.</p>
<p>Change Password, email address or profile information - You can change your password, email address or update your profile information on your user administration page. You will need to log in and then click the 'Update User Account' link.</p>	<p>Additionally, some internet browsers require that PDE be labeled a Trusted Site for navigation purposes. Please add the following URL to your Trusted Site list: <i>http://www.portal.state.pa.us.</i></p>
<p>Forgotten Password - If you have forgotten your password you may utilize the forgotten password tool to have a new password emailed to you. Please note that the password will be sent to the email associated with your profile. If the email associated with your profile is incorrect please contact a Help Desk Support representative (see 5 below).</p>	<p>Please note that pop-ups must be enabled on your web browser for this site</p>
<p>Help Desk Support - If you cannot resolve your problem or answer your question through the resources on this page you may open a ticket with our Help Desk. Fill out the request form and a support person will be in contact with you.</p>	<p>View an overview of our PDE website.</p> <p>Additional Provided Files: In addition to web pages, the PDE website also contains links to files created in Microsoft Word, Excel, PowerPoint and Adobe PDF.</p>

NOTE: Multiple PIMS users must submit a different email address for each user at the same LEA. PIMS users employed by multiple LEAs must submit a different email address for each LEA.

WEBINARS

Webinars are conducted for the individual PIMS collections, and for Questions and Answer sessions. The webinars are offered at different times and dates to allow LEAs the option to attend a webinar that best fits the LEAs schedule. PDE recommends that LEAs attend one session of each appropriate PIMS collections webinar and the Q & A webinars; or listen to the recording of the webinars.

NOTE: Webinars are limited in the amount of seats available for each session.

The individual PIMS collection webinars provide collection-specific information such as:

-  Collection Schedule
-  Accuracy Certification Statement (ACS) Due Date
-  Best Practices
-  Tips and Techniques

The Question and Answer (Q & A) webinars are open forums that include representatives from each of the PIMS collections. This webinar provides the LEAs an opportunity to ask the representatives questions in regards to any of the PIMS collections.

CURRENT WEBINARS

Current, future, and recorded webinar events are listed on www.pdewebinars.org. This Website allows an LEA to view and select current and future events, register for a webinar, or join a webinar session.

The PDE webinar web page defaults to show a list of current webinars that can be searched by:

1. SEARCH FIELD
2. SCROLL BAR

The screenshot shows the Pennsylvania Department of Education's Webinar Events page. The page has a blue header with the logo and navigation links. The main content area is titled 'Current Webinars' and contains a search field with a 'Search' button. Below the search field, there is a list of webinars. The first webinar is titled '2011-12 Graduate, Dropout, and Cohort Graduation Rates for Non-Graduating LEAs' by Michele Hiester. The description states: 'Description: This Webinar is being provided for LEAs that do not graduate students but submit data that may impact other LEAs cohort Graduation Rates. The focus will be on the data elements that need to be submitted to PIMS via the 2011-12 Student template to ensure the Graduate, Dropout, and Cohort Graduation Rate...'. The target audience is 'LEA Data Collection'. Below the description, there is a table of available sessions.

Available Sessions			
Date	Time	Seats Avail / Total	
July 11, 2012	10:00am - 12:00pm	109 / 125	Register
August 15, 2012	10:00am - 12:00pm	120 / 125	Register

Each webinar listing provides the:

1. Webinar Name
2. Name of Presenter
3. Agency of Presenter
4. Description of Webinar
5. Target Audience
6. Available Sessions
7. Date and Time
8. Total Number of Seats
9. Number of Available Seats
10. More Information
11. Register

The screenshot shows a webinar listing with the following elements:

- 1**: Webinar title: "2011-12 Graduate, Dropout, and Cohort for NonGraduating LEAs Webinar"
- 2**: Presenter name: "Michele Hiester - Pennsylvania Department of Education"
- 3**: Agency name: "Education"
- 4**: Description: "Description: This Webinar is being provided for LEAs that do not graduate students but submit data that may impact other LEAs cohort Graduation Rates. The focus will be on the data elements that need to be submitted to PIMS via the 2011-12 Student template to ensure the Graduate, Dropout, and Cohort Graduation Rate..."
- 5**: Target Audience: "Target Audience: LEA Data Collection"
- 6**: "Available Sessions" section header
- 7**: "Date" column header
- 8/9**: "Time" and "Seats Avail / Total" column headers
- 10**: "More Information" button
- 11**: "Register" buttons for each session

Date	Time	Seats Avail / Total	Register
July 11, 2012	10:00am - 12:00pm	109 / 125	Register
August 15, 2012	10:00am - 12:00pm	120 / 125	Register

NOTE: Registering for a webinar is not required, nor does it guarantee a seat. However, it does provide notice in the rare event a webinar is canceled.

ARCHIVED WEBINARS

Webinars are recorded during the live presentations. The recorded webinars are archived for future reference, and are accessible at www.pdewebinars.org/archives.php or through the navigation bar at the top of the screen.



NOTE: To return to current webinars click CURRENT WEBINARS on the navigation bar.

USEFUL LINKS

PDE recommends that LEAs verify that their computer meet or exceed the minimum system requirements, and that the LEAs test their computer in advance of the webinars. Each web page contains a section that provides access to:

 [Presenter Proposal Form](#)

 [System Requirements](#)

 [Test Your Computer](#)

 [Elluminate Support](#)

Performing these two tasks well in advance of the webinar provides the necessary time to correct the problem and still attend the webinar.

NOTE: This process is not necessary for future webinars unless a new or different computer is used to attend the webinar.