

eScholar Data Manager[™] v 3.0 Application User's Guide

Table of Contents

WHAT IS THE ESCHOLAR DATA MANAGER SYSTEM™?	1
THE ESCHOLAR DATA MANAGER™ SYSTEM PROCESS	1
ACCESSING THE SYSTEM.....	2
Login	2
Why Do I Need My Own Login?.....	2
Logout	2
HOME PAGE.....	2
FILE MANAGER	5
UPLOADING FILES.....	5
Via eScholar Data Manager	5
Assumptions	6
REVIEWING FILES.....	6
VIEWING FILE DETAILS	8
VIEWING FILE CONTENT	10
DOWNLOADING FILES	12
DELETING FILES	12
ADDING FILES TO A BATCH.....	13
VIEWING A BATCH.....	14
PROCESSING A BATCH	15
BATCH MANAGER	16
THE BATCH PROCESS	16
BATCH MANAGER PAGE	16
BATCH DETAILS.....	18
BATCH FILE DETAILS & VIEWING ERROR FILES	20
REMOVE BATCH FROM LIST.....	24
APPENDIX A – FILE NAMING CONVENTIONS	26
FILE NAMING CONVENTIONS	26
APPENDIX B – BATCH AND FILE STATUS DEFINITIONS	27
BATCH STATUS AND DEFINITIONS.....	27
FILE STATUS AND DEFINITIONS	27
APPENDIX C – TERMINOLOGY	28
TERMINOLOGY.....	28

A Note on This Manual

Objective

The objective of this manual is to provide application-related information about the eScholar Data Manager™ (also referred to as **eDM** or **System**™ throughout this document). This manual contains the details about application screens, various fields and keywords, and buttons used throughout the System, v.3.0 and later.

What is the eScholar Data Manager System™?

eScholar Data Manager™ (eDM), a component of the eScholar Complete Data Warehouse™, provides a self-service enabled secure web interface to authorized users of the eScholar Complete Data Warehouse™ (district or state users) to guide and control data as it moves through the data Extract, Transform, and Load (ETL) process.

It provides visibility to the process by which data is validated against the eScholar Complete Data Warehouse™ (also referred to as **Data Warehouse**).

eScholar Data Manager™ enables authorized users to:

- Upload input data files that have already been extracted from the source system (SIS, Human Resources, etc.)
- View the status of files received by the system.
- Create and process a batch of files that have been successfully transferred for loading into the Verification Warehouse.
- Monitor the batch as it is processed and review any errors when the processing is complete.
- Refresh the eScholar Complete Data Warehouse™ with validated data from the Verification Warehouse.

THE eSCHOLAR DATA MANAGER™ SYSTEM PROCESS

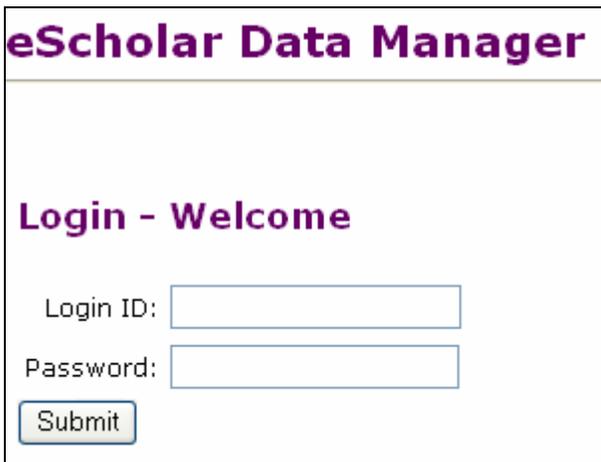
eScholar Data Manager™ helps you to automatically manage the data upload process between your district or state and eScholar's Complete Data Warehouse. The following steps explain eScholar Data Manager's regular processing and are explained in depth throughout this guide:

1. Extract data from the source system(s).
2. Upload files to eDM via web browser.
 - Initial file validation process
 - Review files using File Manager
 - Assignment of batch (which includes selection of files for a batch)
 - Create batch
3. Processing of files in a batch
4. Review data errors produced during processing.
5. Fix possible errors in source file and re-submit files for processing
6. Repeat process until no errors are found
7. Validate that the data is correct.

ACCESSING THE SYSTEM

Login

Authorized users of the System can access the system using the Login ID and password assigned to them. This allows you to identify yourself to eDM. Enter your assigned ID and password in the **LOGIN ID** and **PASSWORD** fields and click **SUBMIT**



eScholar Data Manager

Login - Welcome

Login ID:

Password:

Why Do I Need My Own Login?

Security of data is extremely important. eScholar Data Manager implements role-based security. This means that, based on your ID and the role assigned to it, the System determines:

- The files and batches you are permitted to process
- The available System features

Upon successful login, the *eScholar Data Manager Home* page displays. This is the main and starting page of eDM.

Logout

When you are finished using eDM logout by clicking on the **Logout** function on the sidebar of the eDM **Home** page. The **Login** page redisplay.

HOME PAGE

The eDM Home page displays when you have successfully logged in. This is the beginning and main page of eDM. The Home Page always displays the **User** and the **District**. The **User** is the ID of the current user. This information defaults from the Login Screen.

The **District** is the **District** to which the current user belongs.

User: jdougherty_supr
District: 000 - Public Education
Department
Change District

Home
File Manager
Batch Manager
Logout

Admin Functions
Broadcast Messages
Collection Manager
Data Migration
Metadata Manager
System Properties
Validation Manager

External Links
Uniq-ID for Students
Uniq-ID for Staff

Home

Date	Subject	Message
2007-08-09	Data Submission	Please send all data before the beginning of the school year. The report date is 7/15/2007.

Current Status: Active

Allowed Report Dates:

Collection Period	Reporting Date	Start Date	End Date
Processing Statistics for the Entire System (From the Last 25 Days) :			
Files Uploaded	26		
Batches Processed	8		

The following information displays:

User - The ID of the current user. This information defaults from the *Login Screen*. In the example above, the **User** is *jdougherty_supr*.

District - The **District** of the current user displays. In the example above, the **District** is *000-Public Education Department*.

Message Box - The message box displays a list of messages that have been posted for users including the date the message was posted, the subject and the message itself.

Current Status – Indicates the status of the current district. A district may have one of three status states: Active, Inactive or Approved.

Active – the user is able to upload and process files

Inactive – the user is unable to upload and process files

Allowed Report Dates – This information is critical to the data loading process. The Collection Periods determine whether or not you can upload or process files. The collection windows consist of a starting ending date and reporting dates.

If you have no dates listed here, you will not be able to upload or process any files.

Reporting Date - Another important piece of information on this screen is the **Reporting Date**. If you are submitting any eScholar Snapshot or date specific templates, the snapshot key must match one of the reporting dates listed for the collection window. If they do not match, the file(s) will be rejected.

The links to other EDM pages are located along the left hand side of the Home Page. There you will see links to the **File Manager**, **Batch Manager** and **Logout** pages. In addition, you will see a place for **External Links** that the state may have activated on the Home Page.



NOTE: *The left-hand navigation menu will not be displayed on the remaining sample screenshots in this document but please note that this menu does display on every screen in eDM.*

File Manager

The **File Manager** page enables you to manage files by limiting your view based on a set of dates or file status.

The following functions can be completed from the **File Manager** page:

- Upload files to eDM
- Review files that have been uploaded to eDM including viewing file details
- Download files
- Delete files
- View, create and process batches

eScholar Data Manager ?

File Manager

Date From:

Date To:

File Status:

Find File: by File ID by File Name

Refresh Page

Upload Files

	File ID	Template	File Name	Uploaded Time	Status**	Actions
<input type="checkbox"/>	36	LOCATION	111_LOCATION_200506061207.CSV	2007-07-05 09:45	Validation OK	
<input type="checkbox"/>	35	DISTRICT	111_DISTRICT_20050629105.CSV	2007-07-05 09:44	Validation OK	

Displaying 1 to 2 of 2

**Only files with a status of 'Validation OK' OR 'Validation Warning' can be added to a batch

Refresh Page

UPLOADING FILES

The first step in using eDM is to upload data files so they can move through the data loading process in order to be loaded into the eScholar Complete Data Warehouse.

Via eScholar Data Manager

To start the upload process click on the **Upload Files** button from the **File Manager** page.

eScholar Data Manager

File Upload

<input type="text"/>	<input type="button" value="Browse..."/>

The **File Upload** screen provides a simple interface for this process. Click the **Browse** button in order to find the file(s) you want to upload. When all the desired files have been entered into the filename windows the **Upload** button can be clicked to begin the process of moving the files to eDM.



NOTE: If there is a validation error in one of the files being uploaded all the files on the list will be unable to load.

Assumptions

The input files must be named as per the pre-defined file naming convention (see Appendix A – File Naming Conventions for additional information).

REVIEWING FILES

After your data files have been received by eDM, the next step is to review the status of these files and ensure they have passed validation.

eScholar Data Manager

File Manager

Date From: 06/10/2007 
Date To: 07/05/2007 
File Status: All 

Find File: by File ID by File Name

 File ID	Template	File Name	Uploaded Time	Status**	Actions
<input type="checkbox"/> 36	LOCATION	111_LOCATION_200506061207.CSV	2007-07-05 09:45	Validation OK	   
<input type="checkbox"/> 35	DISTRICT	111_DISTRICT_20050629105.CSV	2007-07-05 09:44	Validation OK	   

Displaying 1 to 2 of 2

**Only files with a status of 'Validation OK' OR 'Validation Warning' can be added to a batch

Click **File Manager** at any time to review the files that have been transferred. It is critical to review files that have a **Failed Validation** status. The errors in these files must be corrected in the source file and re-submitted to eDM before the file can be included in a batch for upload to the Verification Warehouse.



NOTE: Files with a **Validation Warning** status should also be reviewed.

A list of files and their statuses can be reviewed at any time. Begin this process at the **File Manager** window.



NOTE: This window displays all files available in the system that have been uploaded and validated during the current File Processing window. The last file received is the first on the list.

The following information displays on the **File Manager** page:

Filter by Date From – Enter a date (MM/DD/YYYY) to restrict the display of files by a date range. You may also select the oldest date by clicking the calendar image under this field.

Filter by Date To – Enter a date (MM/DD/YYYY) to restrict the display of files by a date range. You may also select the most recent date by clicking the calendar image under this field.

Filter by File Status – Select a file status from the drop down list by which to filter the display of files. Only those files with the selected status display. **All** is the default selection. Refer to **Appendix B File Status Definitions** for additional details.

The full list of filter options is:

- **All** (default) – displays all files.
- **Received** – displays files that have been successfully transferred but are still in the process of validation. These files cannot be reviewed until validation is complete.
- **Failed Validation** – displays files that have failed the validation process. These files are not able to be processed in a batch.
- **Validation Warning** – displays files that have completed validation and had errors within the file. Errors that result in warnings do not prohibit the file from being processed, but the warnings should be reviewed.
- **Validation OK** – displays files that have passed the initial Validation Process. The file can now be considered for inclusion in a batch for upload to the Verification Warehouse.

Find File by File ID or File Name – You can search for a specific file from the list of uploaded files by either File ID or File Name.

Refresh Page – Enables the user to refresh the page at any time.

Upload Files – Navigates to the **File Upload** page.

For each file listed on the **File Manager** page the following information displays:

File ID - The System-assigned ID of the file. This value is used to uniquely identify each file.

Template – The name of the eScholar Template with which this file is associated.

File Name – The name of the file that has been uploaded to eDM.

Uploaded Time – The date (YYYY-MM-DD) and time (HH:MM:SS) the file was received.

Status – The status of the file indicated by an icon and a description. Status states include: **Received, Failed Validation, Validation Warning and Validation OK.**

Action – There are three actions that can be performed on a file. File Details can be viewed, files can be downloaded in compressed format and files can be downloaded in original source format.

VIEWING FILE DETAILS

To view file details click the **View** icon  in the **Action** column next to a file name on the **File Manager** page. The **File Details** window displays.

eScholar Data Manager

File Details

Filename: 111_LOCATION_200506061207.CSV
Associated Template: LOCATION
File ID: 36
Uploaded Time: 2007-07-05
Header Record Present: Yes
Delimiter: ,
Total Number of Records: 2873
Status: Validation OK 

Validation Information

Uploaded By: jdougherty_supr
Uploaded Time: 2007-07-05 09:45
Uploaded Via: HTTP
Last Modified By: jdougherty_supr
Last Modified Time: 2007-07-05 09:45
Total Validation Time: 2.513 seconds

Archive Information

Archived: No
Archived Time:

Files

Source File	Records	Last Modified Date	View File Content
111_LOCATION_200506061207.CSV	2873	2007-07-05 09:45	

The following information displays about the selected file:

Filename – The name of the template file that was uploaded to the system.

Associated Template – The name of the eScholar Complete Data Warehouse Template to which these records are to be uploaded.

File ID - The identifier assigned by eDM for the uploaded file. This value is used to uniquely identify each file in eDM and can be used as search criteria on the File Manager page.

Uploaded time – The date and time when the file was received by eDM.

Header Records Present – Indicates whether the file contains a lead or header row that contains the column headers for the template but no real data.

Delimiter – Indicates which character is used to separate the columns within each template file.

Total Number of Records – Indicates the total count of all data records identified in the file.

Status – Indicates the file status (Validation OK, Validation warning, etc.)

Validation Information – Details concerning the Uploading, Modification and Validation of the file are displayed.

Archive Information – Indicates whether the file is archived and when it was archived.

Files – The name of the source file, the number of records and the date the file was last modified are listed at the bottom of the **File Details** page.

If there were any validation issues with your uploaded file, an error log will be displayed. eDM will not let any individual records that fail validation pass through the Data Loading process. You will have a details button for each validation error file.

The buttons at the bottom of this window enable the user to:

Add to Batch – Add this file to a batch.

Delete – Delete this file from eDM.

Cancel – Return to the **File Manager** window.

VIEWING FILE CONTENT

The records within a file can be reviewed at any time. It is especially important to review files with a **Validation Failed** status. The errors in these files must be corrected in the source system, then the template must be re-extracted and re-submitted to eDM before the file can be included in a Batch for upload to the Verification Warehouse. Files with a status of **Validation Warning** should also be reviewed. Although these files can be uploaded to the Verification Warehouse, the issues raised during the validation process may cause problems later in the data loading process.

Click the **View File Content** icon  on the **File Details** page to display the **File Content** window.

eScholar Data Manager

File Content

Filename: 111_LOCATION_200506061207.CSV
Associated Template: LOCATION
File ID: 36
Uploaded Time: 2007-07-05
Header Record Present: Yes
Delimiter: ,
Total Number of Records: 2873
Action: Download File   

File Snapshot

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

601	0103	New Appling Cou	New Appling County High School						
601	0177	Appling County	Appling County Elementary School	680 Blackshear Highway	Baxley	GA	31513	912	
601	0195	Appling County	Appling County Middle School	2997 Blackshear Highway	Baxley	GA	31513	912	
601	0198	Appling County	Appling County Learning Center	302 East Allen Street	Baxley	GA	31513	912	
601	0277	Appling County	Appling County Primary School	678 Blackshear Highway	Baxley	GA	31513	912	
601	1050	Altamaha Elemen	Altamaha Elementary School	344 Altamaha School Road	Baxley	GA	31513	912	
601	2050	Appling County	Appling County High School	482 Blackshear Highway	Baxley	GA	31513	912	
601	3050	Appling County	Appling County Junior High School						

The following information displays about the currently viewed file:

Filename – The name of the file.

Associated Template – The name of the eScholar Complete Data Warehouse Template to which these records are to be uploaded.

File ID - The system-assigned ID of the selected file. This value is used to uniquely identify each file in eDM.

Uploaded Time – The date and time when the file was received by eDM.

Header Records Present – – Indicates whether the file contains a lead or header row that contains the column headers for the template but no real data.

Delimiter – Indicates which character is being used to separate the columns within each template file.

Total Number of Records – Indicates the total count of all data records identified in the file.

Action – Indicates the possible actions that can be taken with the file being viewed.

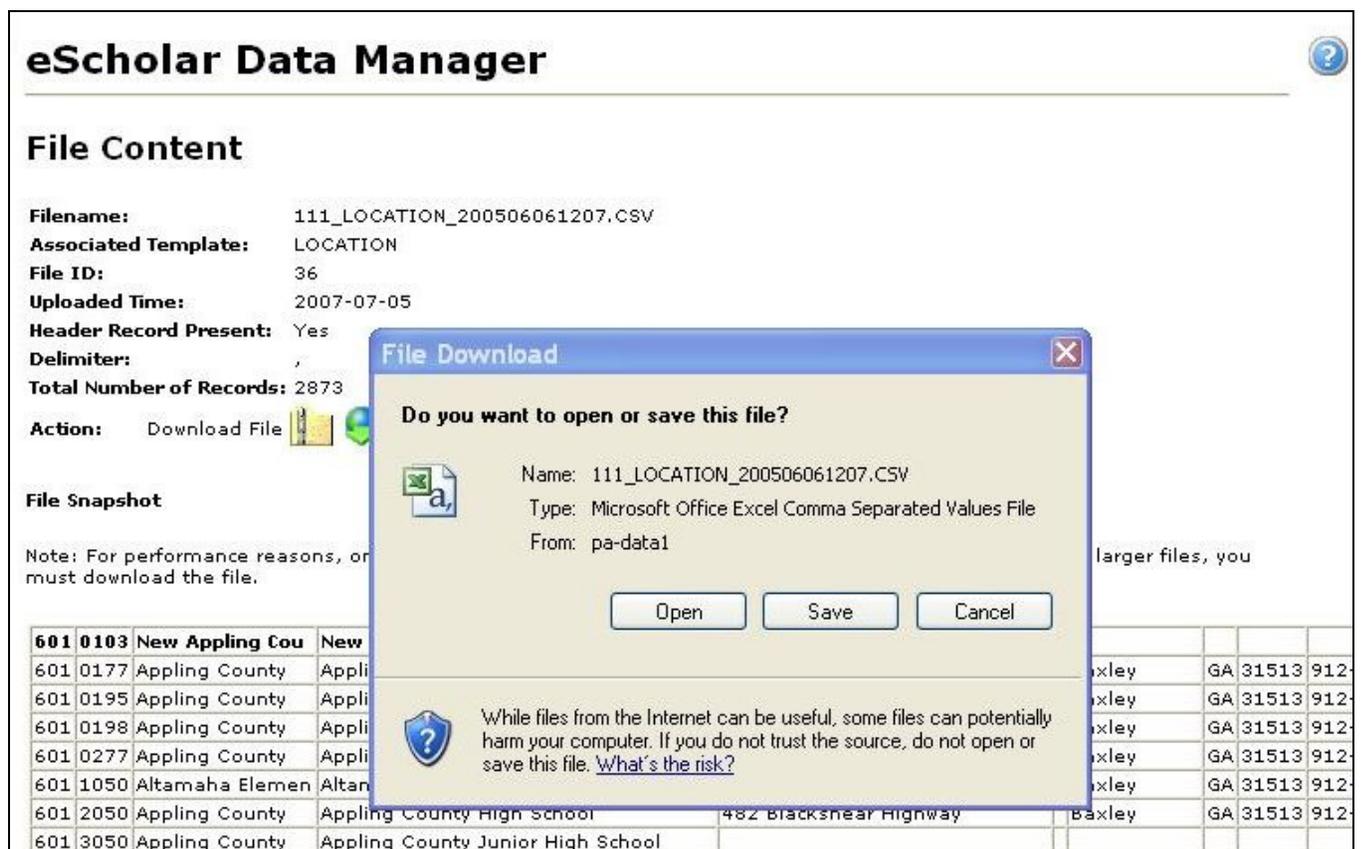
File Snapshot – The first 100 records of the data file are displayed. If you want to view all the records in the file, you must download the file.

From the **File Content** page you can navigate back to the **File Manager** page using the links on the left hand side of the window.

DOWNLOADING FILES

File can be downloaded from the **File Manager** window or the **File Content** window in either compressed or original source format. When you click on either one of the download icons

( ) the **File Download** pop up window displays.



eScholar Data Manager

File Content

Filename: 111_LOCATION_200506061207.CSV
Associated Template: LOCATION
File ID: 36
Uploaded Time: 2007-07-05
Header Record Present: Yes
Delimiter: ,
Total Number of Records: 2873

Action: Download File  

File Snapshot

Note: For performance reasons, or larger files, you must download the file.

File Download

Do you want to open or save this file?

Name: 111_LOCATION_200506061207.CSV
 Type: Microsoft Office Excel Comma Separated Values File
 From: pa-data1

Open Save Cancel

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

601	0103	New Appling Cou	New					
601	0177	Appling County	Appli					
601	0195	Appling County	Appli					
601	0198	Appling County	Appli					
601	0277	Appling County	Appli					
601	1050	Altamaha Elemen	Altan					
601	2050	Appling County	Appling County High School	482 Blackshear Highway	Baxley	GA	31513	912-
601	3050	Appling County	Appling County Junior High School					

You can either **Open** the file for immediate viewing or **Save** it to view at a later time.

To navigate back to the **File Manager** page you can use the link on the left hand navigation menu (not shown in this screen shot).

DELETING FILES

There are a few reasons that you may need to delete files from **File Manager**. You may have mistakenly uploaded the wrong file or a file may have a status of **Failed Validation** in which case the file needs to be deleted and the data fixed at the source before that file can be processed. You can delete a file while it is in any of the status states except **Received**.

To delete a file from the **File Manager** page, select the file(s) that you want to delete by clicking in the small box to the left of the File ID, then click the **Delete** button at the bottom of the page. The **Delete File(s)** window appears.

eScholar Data Manager ?

Delete File(s)

To delete the 1 file(s) listed, press the 'Delete' button below:

The following file(s) will be removed from the system.
Press 'Delete' to continue or 'Cancel' to abort.
Please review the list of files below before deleting them:

File ID	Template	File Name	Received Time	Status	Actions
<input type="checkbox"/> 36	LOCATION	111_LOCATION_200506061207.CSV	2007-07-05 09:45	Validation OK	   

Displaying 1 to 1 of 1

To delete the 1 file(s) listed, press the 'Delete' button below:

If you have reviewed the files on the **Delete** list and are sure you want to proceed with the delete, then click either **Delete** button (there is one at the top of the page and one at the bottom) to delete the file(s) from eDM. The **File Manager** page reappears with the deleted file removed.

If there are files on the **Delete File(s)** page which, after review, you have decided should not be deleted, then you can remove the file from the Delete list by selecting the file and clicking on the **Remove From List** button. The **Delete Files(s)** page refreshes with the file(s) removed.

ADDING FILES TO A BATCH

Files with a status of **Validation OK** or **Validation Warning** can be added to a batch for loading into the data warehouse. To add files to a batch select the files that you want to add from the **File Manager** page and click the **Add to Batch** button at the bottom of the page.

eScholar Data Manager ?

File Manager

Date From:

Date To:

File Status:

Refresh Page

Find File: by File ID by File Name

Upload Files

File ID	Template	File Name	Uploaded Time	Status**	Actions
<input checked="" type="checkbox"/>	36 LOCATION	111_LOCATION_200506061207.CSV	2007-07-05 09:45	Validation OK	
<input checked="" type="checkbox"/>	35 DISTRICT	111_DISTRICT_20050629105.CSV	2007-07-05 09:44	Validation OK	

Displaying 1 to 2 of 2

**Only files with a status of 'Validation OK' OR 'Validation Warning' can be added to a batch

Refresh Page

The **File Manager** page refreshes with the **View Batch** button now added at the bottom of the page. Click the **View Batch** button in order to view the files that have been assigned to the batch.

VIEWING A BATCH

The **View Batch** page enables you to associate comments with a batch, remove files from the batch and begin processing the batch.

eScholar Data Manager ?

View Batch

Add optional comments below or
To create a batch with the 1 file(s) in the cart,
press the 'Process Batch' button below:

Process this batch for the following School Year:

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

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

File ID	Template	File Name	Received Time	Status	Actions
<input type="checkbox"/> 35 DISTRICT		111_DISTRICT_20050629105.CSV	2007-07-Validation 05 09:44 OK	✓	

Displaying 1 to 1 of 1

To create a batch with the 1 file(s) in the cart, press the 'Process Batch' button below:

Add comments to the batch by entering relevant information in the Add comments window. The comments that you enter can help you find batches in the future. The Batch Manager page provides a search that allows users to search by comments.

You can also remove files from the batch before processing by selecting the file(s) you want to remove and then clicking the **Remove From Batch** button. The **View Batch** page refreshes with the selected files removed.

PROCESSING A BATCH

After you have confirmed that the files listed are the ones you want to process in the batch, then click the **Process Batch** button.

The **Batch Manager** window opens from which you can monitor the progress of the batch. eScholar Data Manager will sort the files within a batch according to the predefined dependency order. For example, the system will not try to load a Student Grades template before a Student template as long as they are in the same batch.

Batch Manager

THE BATCH PROCESS

What does it mean to process a batch with eScholar Data Manager?

When a batch is created, each eScholar template is processed one at a time. During this process, the data is being checked for validity and dependencies while it is being loaded into eScholar's Complete Data Warehouse.

BATCH MANAGER PAGE

The **Batch Manager Page** lists the batches that have been directed to begin processing. A list of batches and their statuses can be reviewed at any time. Begin this process at the **Batch Manager** window.



NOTE: This window displays all batches available in the system. The last batch received is the first on the list.

eScholar Data Manager

Batch Manager

Date From:
06/10/2007

Date To:
07/05/2007

Batch Status:
All

Batch Type:
All Filter

Find Batch: by Batch ID by Comments

Search

Refresh Page

	Batch ID	Batch Type	Comments	Modified Time	Batch Status	Data Status	Actions
<input type="checkbox"/>	27	Data Load		2007-07-04 12:57	Complete		
<input type="checkbox"/>	26	Data Load		2007-07-04 12:55	Complete		
<input type="checkbox"/>	25	Data Load		2007-07-04 12:04	Complete		

Displaying 1 to 3 of 12

First Prev Next Last

Remove from list **

Refresh Page

****Removing batches from the list does NOT delete the batches from the system.**

The following information displays on the **Batch Manager** page:

Filter by Date From – Enter a date (MM/DD/YYYY) to restrict the display of batches by a date range. You may also select the oldest date by clicking the calendar image under this field.

Filter by Date To – Enter a date (MM/DD/YYYY) to restrict the display of batches by a date range. You may also select the most recent date by clicking the calendar image under this field.

Filter by Batch Status – Select a batch status from the drop down list by which to filter the display of batches. Only those batches with the selected status display. **All** is the default selection. Refer to **File Status** in Appendix B for additional details.

The full list of filter options is:

- **All** (default) – displays all batches.
- **Ready to Process** – displays batches that are ready to process.
- **Processing** – displays batches that are processing.
- **Complete** – displays batches that have completed processing
- **Failed** – displays batches that did not complete processing.

Filter by Batch Type – Select a batch type from the drop down list by which to filter the display of batches. Only those batches with the selected type will display. **ALL** is the default selection. There is only one batch type available at this time but the functionality is available for possible enhancement in future releases.

- **All** (default) – displays all batch types
- **Data Load** – display batches of type Data Load

Find Batch by Batch ID or Comments – You can search for a specific batch from the list of uploaded batches by either Batch ID or Comments.

For each batch listed on the **Batch Manager** page the following information displays:

Batch ID – The system-assigned ID of the batch. This value is used to uniquely identify each batch.

Batch Type – Identifies the type of the batch. At this time **Data Load** is the only type available.

Comments – Comments entered for this batch display here.

Modified Time – Displays the last time the state of the batch changed in any way such as at batch creation and the start or completion of data loading.

Batch Status – The status of the batch: **Ready to Process, Processing, Complete or Failed.**

Data Status – Indicates the status of data in the batch. The possibilities for data status and associated icons include:

Batch Status	Associated Status Icon
Ready to Process	
Processing	
Complete	
Complete with Warnings	
Complete with Errors	
Failed	

Actions – By clicking on this icon under **Actions** you can **View Batch Details**.

BATCH DETAILS

The Batch Status column on the **Batch Manager** page always indicates the status of batches. If you have previously created a batch to process with successfully received files, this field will indicate if the batch is still processing or if the batch has completed processing.

In order to view the details of a completed batch, click on the magnifying glass icon in the **Actions** column for a completed batch on the **Batch Manager** page and the **Batch Details** page will display. This page displays the individual files that make up the batch and the status of each file in the batch.

eScholar Data Manager

Batch Details



Batch ID: 27
Last Modified: 2007-07-04
Batch Status: Complete
Data Status: 

Comments

File ID	Template	File Name	Uploaded Time	Batch Status	Data Status	Actions
32	LOCATION	111_LOCATION_200506291058.CSV	2007-07-04	Plan Complete		

Displaying 1 to 1 of 1

First Prev Next Last

The information that is displayed on the **Batch Details** page includes:

Batch ID - The system-assigned ID of the batch. This value is used to uniquely identify each batch.

Last Modified - The date the batch was last modified.

Batch Status - The current status of the batch.

Data Status - The status of the data in the batch. The possibilities for data status include **Ready to Process, Processing, Complete, Complete with warnings, Complete with errors and Failed.**

Comments - If there are comments attached to the batch they will be displayed.

For each file assigned to a batch the following information displays:

File ID - The System-assigned ID of the file. This value is used to uniquely identify each file.

Template - The name of the eScholar template with which this file is associated.

File Name - The name of the file uploaded to eDM.

Uploaded Time - The date (YYYY-MM-DD) and time (HH:MM:SS) the file was received.

Batch Status - The status of the load plan for each file in the batch.

Data Status – The status of the data that was loaded for each file in the batch

Actions – Enables the user to view the details of the data load/errors for each file.

BATCH FILE DETAILS & VIEWING ERROR FILES

To view the details about a specific file click on the magnifying glass in the **Actions** column next to the file you wish to view. The **File Details** window is displayed.

The File Details page displays the following information:

Filename – The name of the file.

Associated Template – The name of the eScholar Complete Data Warehouse Template to which these records are to be uploaded.

File ID - The system-assigned ID of the selected file. This value is used to uniquely identify each file in eDM.

Batch ID – The system-assigned ID for the batch to which this file was assigned.

Uploaded time – The date when the file was received by eDM.

Header Records Present – Whether or not there are header records present in the file

Delimiter – An indication of which type of delimiter was found in the file.

Total Number of Records – A count of the total number of records in the file.

Status – An indication of the batch status for this file.

The data loading Extract, Transfer and Load (ETL) information for the file displays. This provides information concerning summary results of the data load into the warehouse. The following information displays:

ETL Plan Start – The time at which the plan started to execute.

ETL Plan End – The time at which the plan finished executing.

Records Inserted – The number of records that were inserted into the Verification Data Warehouse during the batch processing.

Records Updated – The number of records that were updated in the verification data warehouse during the batch processing.

Records Not Processed – The number of records that were unable to be loaded into the Verification Data Warehouse because errors were encountered during file processing.

The source file that was processed is listed next including the name of the file, the number of records in the file and the date it was last modified. An icon is available for you to click to view the records in the file. In addition, files generated by the data load process are listed including error files and load plan log files. These can be viewed in detail by clicking on the icon located next to each file.

eScholar Data Manager ?

File Details

Filename: 111_LOCATION_200506291058.CSV
Associated Template: LOCATION
File ID: 32
Batch ID: 27
Uploaded Time: 2007-07-04
Header Record Present: Yes
Delimiter: ;
Total Number of Records: 2889
Status: Plan Complete 

Validation Information
Uploaded By: svwhite_supr
Uploaded Time: 2007-07-04 12:56
Uploaded Via: HTTP
Last Modified By: svwhite_supr
Last Modified Time: 2007-07-04 12:56
Total Validation Time: 2.577 seconds

Archive Information
Archived: No
Archived Time:

ETL Information
ETL Plan Start: 2007-07-04 12:56
ETL Plan End: 2007-07-04 12:57
Records Inserted: 0
Records Updated: 2886
Records Not Processed: 3

Files			
Source File	Records	Last Modified Date	View File Content
111_LOCATION_200506291058.CSV	2889	2007-07-04 12:56	

ETL Generated Files			
File	Records	Last Modified Date	View File Content
ERROR_SOURCEFILE_MSG	2	2007-07-04 12:57	
LP_LOCATION.log	2	2007-07-04 12:57	

To review the contents of a source file within eDM, click the **View File Content** icon  to the right of a **Source file** to review the contents of the records that were processed. The **File Content** screen for the selected file displays.

eScholar Data Manager

File Content

Filename: 111_LOCATION_200506061207.CSV
Associated Template: LOCATION
File ID: 36
Uploaded Time: 2007-07-05
Header Record Present: Yes
Delimiter: ,
Total Number of Records: 2873
Action: Download File  

File Snapshot

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

601	0103	New Appling Cou	New Appling County High School						
601	0177	Appling County	Appling County Elementary School	680 Blackshear Highway	Baxley	GA	31513	912-	
601	0195	Appling County	Appling County Middle School	2997 Blackshear Highway	Baxley	GA	31513	912-	
601	0198	Appling County	Appling County Learning Center	302 East Allen Street	Baxley	GA	31513	912-	
601	0277	Appling County	Appling County Primary School	678 Blackshear Highway	Baxley	GA	31513	912-	
601	1050	Altamaha Elemen	Altamaha Elementary School	344 Altamaha School Road	Baxley	GA	31513	912-	
601	2050	Appling County	Appling County High School	482 Blackshear Highway	Baxley	GA	31513	912-	
601	3050	Appling County	Appling County Junior High School						

The following information displays about the currently viewed file:

Filename – The name of the file.

Associated Template – The name of the eScholar Complete Data Warehouse Template to which these records are to be uploaded.

File ID - The system-assigned ID of the selected file. This value is used to uniquely identify each file in eDM.

Uploaded time – The date when the file was received by eDM.

Header Records Present – Whether or not there are header records present in the file

Delimiter – An indication of which type of delimiter was found in the file.

Total Number of Records – A count of the total number of records in the file.

Action – The possible actions that can be taken with the file being viewed. This includes downloading the file in compressed or original source format.

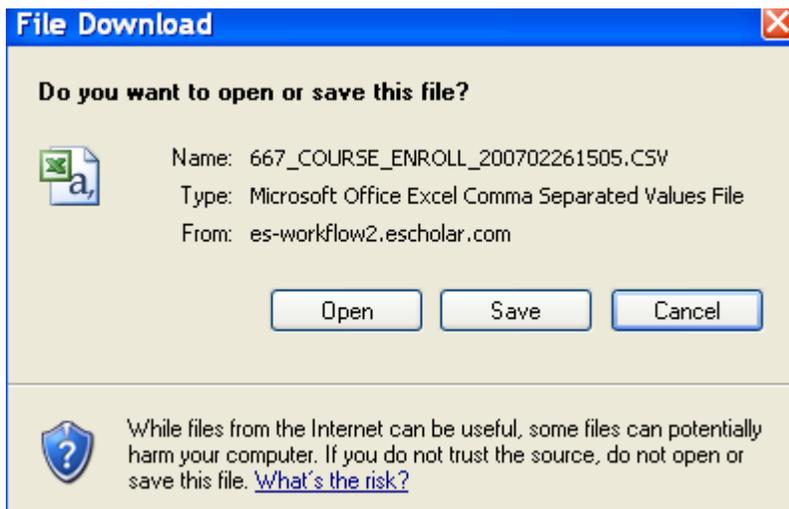
File Snapshot – The first 100 records of the data file are displayed. If you want to view all the records in the file, you must download the file.

You can view each file on the **File Details** page by using the navigation buttons on the top right corner of this page to move from one file to the next.

To download a file for full viewing click on either the icon for compressed format or original source format next to **Actions** on the **File Content** page. The **File Download** popup window displays.



NOTE: eScholar recommends that you first **OPEN** the file containing errors and then save it to your desktop. Click **OPEN** to download and open the file with the default software associated with the file type, i.e. text files open with Notepad, CSV (comma separated) and TAB (tab separated) files may open with Microsoft™ Excel, Text Pad, etc, (The actual program which opens these files depends on the system configuration of your machine).



NOTE: Opening files in Microsoft™ Excel may cause errors in date formats.

Review the details of these records. If the selected file failed to load, you can determine the corrections needed for the failed records by reviewing the information displayed in the **LogFile**.



NOTE: Select **File -> Save As** and select a location on your local hard drive to save the source file to your desktop.

If you are attempting to correct errors in a failed file, the data **must** be corrected in the source file, then re-uploaded and submitted for processing.

To review the contents of an ETL generated file within eDM, click **View File Content** icon to the right of one of the files listed in this section to review the contents of the file. The **File Content** screen for the selected file displays.

eScholar Data Manager

File Content

Filename: ERROR_DUPLICATES

Action: Download File 

File Preview

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

Source Record Number	Duplicate Count	Duplicate Status	(K) District Code	(K) Location Code	Location Short Name	Location Name	Location Address 1	Location Address 2	Location City
1121	2	Passed	605	0189	Baldwin High Sc	Baldwin High School			
1122	2	Rejected	605	0189	Baldwin High Sc	Baldwin High School			
2544	2	Passed	606	0189	Banks County Pr	Banks County Primary School			
2545	2	Rejected	606	0189	Banks County Pr	Banks County Primary School			
1134	2	Passed	607	0193	Bramlett Elemen	Bramlett Elementary School			
1135	2	Rejected	607	0193	Bramlett Elemen	Bramlett Elementary School			
2613	2	Passed	608	0277	Adairsville Mid	Adairsville Middle/High School			
2614	2	Rejected	608	0277	Adairsville Mid	Adairsville Middle/High School			
1285	2	Passed	608	2052	Emerson Element	Emerson Elementary School			
1286	2	Rejected	608	2052	Emerson Element	Emerson Elementary School			

This is an example of a **File Content** screen for an error file. The pertinent information concerning the cause of the error(s) is displayed as well as whether or not the record was rejected. The file can be downloaded for viewing and analysis at a later date.

REMOVE BATCH FROM LIST

Batches listed on the **Batch Manager** page remain on this list as long as they are between the **Date From** and **Date To** dates unless you remove them from the list. To remove a batch from this list, select the batch that you want to remove and click the **Remove from List** button. The page refreshes with the selected batch(es) removed.



NOTE: Removing batches from the list does NOT delete them from the system or delete data loaded by them from the Data Warehouse.

eScholar Data Manager ?

Batch Manager

Date From: 
Date To: 
Batch Status: 
Batch Type: 

Find Batch: by Batch ID by Comments

 Refresh Page

	Batch ID	Batch Type	Comments	Modified Time	Batch Status	Data Status	Actions
<input type="checkbox"/>	43	Data Load		2007-07-07 13:01	Ready To Process		
<input type="checkbox"/>	27	Data Load		2007-07-04 12:57	Complete		
<input checked="" type="checkbox"/>	26	Data Load		2007-07-04 12:55	Complete		

Displaying 1 to 3 of 13

**
  Refresh Page

****Removing batches from the list does NOT delete the batches from the system.**

Appendix A – File Naming Conventions

FILE NAMING CONVENTIONS

It is important to name the files that are uploaded in a particular way so that the system can interpret and process them correctly. Data files that are not named correctly may not be accepted by the system.

The following example illustrates the naming convention used for extracted data files:

DistrictCode_TargetTable_YYYYMMDDHHMM.xxx

Example: 10000009_student_200709051134.csv

- District Code = 9-digit Administrative Unit Number
 - ✓ For example, 10000009
- Target Table (located on template) e.g., "Student"
- Time Stamp (ensures uniqueness for the file) e.g., "200709051134"
 - ✓ This represents the time of day when the file was actually created.
- File Extension (data separator type) e.g., "csv"
 - ✓ csv: comma separated
 - ✓ tab: tab separated
 - ✓ del: other delimiter



NOTE: When submitting Zipped or compressed files, the name of the actual ZIP file does not have to adhere to the file naming convention. However, the files contained within the ZIP file must adhere to the naming convention. The files will be validated as they are extracted. If one file fails validation in a ZIP file the entire ZIP files fails.

Appendix B – Batch and File Status Definitions

BATCH STATUS AND DEFINITIONS

STATUS NAME	ASSOCIATED DATA STATUS ICON	DESCRIPTION
Complete		This batch or individual load plan has completed processing and the system did not encounter any data errors.
Complete with Warnings		This batch or individual load plan has completed processing and the system found Load Plan Warnings. The load plans continue to load these records even though they produce data alerts.
Complete with Errors		This batch or individual load plan has completed processing and the system found data errors that resulted in records not processing. These batches or individual plans should be reviewed carefully to identify the data errors.
Ready To Process		The batch or individual plan has not been picked up by them system yet. This icon indicates a waiting or queued status.
Processing		This batch or individual load plan is currently being processed by the system. The status icon will be changed when it is complete.
Failed		The batch or individual load plan has failed. The template files that were included in this batch should be uploaded and processed again. Please notify your system administrator in this case.

FILE STATUS AND DEFINITIONS

STATUS NAME	ASSOCIATED ICON	DESCRIPTION
Received		The template file has been received by the system. The user cannot do anything with this file until it completes validation
Validation OK		The template file has completed validation and is ready for batch processing
Validation Warning		The template has encountered errors during validation, but not enough to fail the file completely. These templates can still be processed but the system has stripped out the records that did not validate.
Validation Failed		The template file has too many validation errors and it is unusable. The only options for users with these files are to review the error details and delete. The system will not let a user add these files to a batch.

Appendix C – Terminology

TERMINOLOGY

WORD	DEFINITION
Batch	A logical group of files selected by an eDM user to process as a single entity via the ETL Process in order to update the Complete Data Warehouse.
Batch ID	eDM assigns an ID to each Batch. The ID is used to identify the Batch and cannot be modified.
PDE	PA Department of Education.
CDW	eScholar’s Complete Data Warehouse.
ETL	Extract, Transform and Load. Most commonly used in the Data Warehouse environment to represent the Extract (data extracted from source systems), Transform (cleanse and transform the data) and Load (load the data into the CDW) process. eScholar uses the Sagent Data Flow Service software from Group One for ETL processing.
File ID	The eDM assigns an ID to each file that is uploaded successfully. The ID is used to identify the file and cannot be modified.
File	A data file FTPed into the eDM System by the Education Department and District users to update the data in the CDW. Each file is normally associated with a template.
Logical Key	Essential table data, e.g., District, Student, Location, and School Year.
SIS	Student Information System
VDWH	Verification Data Warehouse, i.e., Staging Data Warehouse. In the eScholar Data Warehouse, the data is first loaded into the VDWH. Data in the VDWH must be verified by an eDM user before it may be loaded to the eScholar Complete Data Warehouse.