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# Overview

The following instructions are provided as a tool to help you load data into the staff interchange, correct errors, and create an error-free Human Resources snapshot to submit to the Colorado Department of Education.

# Following the links

Wherever something is underlined in this documentation, you can press the [Ctrl] key and click your mouse (over the item). That will bring you to additional information on the item.

# What is the Human Resource snapshot?

In other words: What does it mean to create or re-create a Human Resources snapshot?

Please note: the Human Resources collect all General Education staff employed as of December 1st of the school year by school, district and position. Districts and BOCES complete the Human Resources snapshot process.

Data is extracted from:

* the Staff Profile file
* the Staff Assignment file

And some data is calculated

* + Teaching Level
* Active Colorado License

**IMPORTANT!**

Data is **not** automatically added to or removed from a snapshot!

Updates to the Staff Profile, Staff Assignment files are not automatically reflected in a snapshot

You need to create (or re-create) the snapshot to bring data into it

You cannot edit snapshot data directly.

To reflect changes in the snapshot, you must re-create your snapshot every time you:

* Add staff or assignments to the Staff Profile or Staff Assignment files
* Make any changes to the Staff Profile or Staff Assignment files
* Delete staff from the Staff Profile or Staff Assignment files

# Human Resources Snapshot Criteria

For an EDID to be added to the snapshot it must:

* Be in both the Staff Profile and Staff Assignment files
* Be error free in both those files

***And***

* Meet the following criteria (fields referenced are in the Staff Assignment file):
  + Special Education is marked as 0 (no)
  + Start date is December 1st or prior to December 1st of reporting school year
  + Employment Status code = 11 (Active employment in same position at the school); 12 (Active employment in different position at the school); 13 (Active employment within the district); 23 (Purchased services); or 25 (Intern)
  + Job class codes are not equal to 632 (Temporary/Part-time Worker As Needed) or 634 (Student Worker)

# Checklist of Steps

This is a guideline only; you can modify for any additional steps you perform

* Obtain Educator IDs (EDIDs) for all staff - EDIS
* If applicable, update EDIS for legal name change

|  |
| --- |
| **Staff Interchange** |

* Review documents which show the file layouts and the definitions of the file elements at <http://www.cde.state.co.us/datapipeline/inter_staff>
  + Staff File
  + Staff Assignment File
* There are also templates on that page which have the fields you need to load
* Create or extract from your Staff data source the two Staff files:
  + Staff Profile File
  + Staff Assignment File

All staff should have a unique Educator Identifier (EDID) – separate process, EDIS

See sections below entitled “[Data Files](#_Data_Files)” and “[Naming Conventions](#_Naming_conventions)” for naming conventions and tips to avoid receiving file load errors. That includes backing up a file before you modify it!

* To upload and edit Staff Profile files in Pipeline, you will need to have a role in [Identity Management (IdM)](#_Identity_Management_Roles) : STF~LEAUSER Submit and Modify Role
  + You will need to ask your Local Access Manager (LAM) for the necessary rights if you do not have them

Don’t know who your LAM is? Go to: <https://edx.cde.state.co.us/CDEIdM/districtLAMSupport.jsp> for assistance.

* Access Data Pipeline
  + Are you in production?
    - Production header is in blue
    - QA (for testing/learning) is in red and has “Data Pipeline – TEST System”
* In Data Pipeline, select “Format Checker” and upload the file to check format (will only check 1st record following header row)
  + If errors, fix and re-upload
* First upload your Staff Profile file by selecting “File Upload”

See the “Data Files” section below for what can trigger errors

* Did Staff Profile file upload complete? Wait until complete before checking for errors. How to check? One of these methods:
  + You will receive an email indicating it completed and noting number of records processed and number with errors
  + Under “File Upload” select “Batch Maintenance”
    - [Processed Indicator] on that screen will have “Y” if completed

[Click here for sample email of Staff Profile file completing](#_Demographic_(DEM)_file)

* If the file upload did ***not*** complete the email you received should have the reason.
  + Is there an “Error Details” line near bottom? If yes:
    - Open your file. Go the line number + 1 (1 is the header) and see if you can find the error. There could be an extra comma, incorrect formatting
    - There is an example email below

See section below “[File Error Example Email](#_File_Error_Example_1)”

* + Fix problem and continue at “File Upload” step
* Load the Staff Assignment file

Important! Do not load Staff Assignment file until the Staff Profile load is complete

* Did Staff Assignment file upload complete? Wait until complete before checking for errors. How to check? Same method as for the Staff Profile file

[Click here for sample email of Staff Assignment file completing](#_Student_School_Association)

* Review summary errors (if desired):
  + Data Pipeline -> File Upload -> Validation Report
  + Data Pipeline -> Pipeline Reports –> Error Reports
  + Cognos Report -> Staff Profile ->
    - Staff Profile Error Summary Report
    - Staff Assignment Error Summary Report
* Review individual records with errors or warnings:
  + Data Pipeline -> Pipeline Reports –> Error Reports -> Select specific edits for detailed review
  + Cognos Report -> Staff Profile ->
    - Staff Profile Error Detail Report
    - Staff Assignment Error Detail Report
  + Or use “Edit Record” option in Pipeline to select only records with errors (select [Error Records] = “Yes” from dropdown on that screen

Easiest to download the Cognos Report as “View In Excel 2007 Data”

or use the Error Reports in Pipeline and download into Excel

* Correct Staff Profile and Staff Assignment errors. Some methods:
  + Correct in your system and then download a new file and re-upload
  + Correct in the file
    - **IMPORTANT** – if it is a text file, edit with a text editor, not Excel
* In Data Pipeline -> “Edit Record” to change or delete
* In Data Pipeline -> “Add Record” to add a record

|  |
| --- |
| **Human Resources Snapshot** |

* To create a Human Resources snapshot in Pipeline, you will need to have a role in [Identity Management (IdM)](#_Identity_Management_Roles) of either:
  + HRD~LEAUSER Submit and Modify Role
  + HRD~LEAAPPROVER Approver Role
  + You will need to ask your Local Access Manager (LAM) for the necessary rights if you do not have them
* Create Human Resources snapshot

In Pipeline select Staff Profile -> Snapshot

In most instances, select “Create Snapshot”

Top of screen will show “Snapshot creation triggered and processing. A notification email will be sent upon completion.”

See “[Creating Snapshot](#_Creating_Human_Resources)” section below for information on the “Update Snapshot” option

* Wait until the snapshot completes before reviewing error/warning and other Human Resources reports

How to determine if it completed:

* You will receive an email when it is done
* In Pipeline select Staff Profile -> Status Dashboard -> File Type = Human Resources

If complete, “Data Exists” will be set to Y and “Last Updated Date” will be the date and time you created the snapshot

* Review snapshot level errors **and** warnings
  + Cognos Report -> Human Resources ->
    - Human Resources Error Detail Report
    - Human Resources Error Summary Report
* Corrections, changes, and new IDs?
  + You will need to make corrections in the Staff File and Staff Assignment files using the methods described above (Edit/Add functionality or load files with changes)
  + Be sure the Staff File and Staff Assignment files pass interchange edits before creating a new snapshot-any interchange record with an error will not be included in the snapshot
* Re-create the snapshot every time after corrections, changes, and additions:

**Important!** (Additional information)

**Every time you add a staff, delete a staff, OR make a change to the Staff Profile or Staff Assignment data, you need to re-create the snapshot in order to reflect those changes in the snapshot**

* When corrections and additions are complete (or you can do this step even when they are not done to verify the data): review Human Resource Cognos reports

Cognos Report -> Human Resources ->

Suggest review **all** reports, especially:

* + - Highly Qualified teacher
    - Human Resource Snapshot Records
    - Overall Performance Ratings
    - Special Education Staff Report
    - Summary of Gender by District
    - Summary of Job Classification by District
    - Summary of Job Classification by School
    - Summary of Race/Ethnicity by District
    - Snapshot Records Excluded Due to Profile Errors

What are you looking for/verifying? **Some suggested** starting points are:

* Verify against your district’s files, reports, and data – do your records match CDE report counts? Specifically, summary of (1) Gender, (2) Job Classification, and (3) Race/Ethnicity by District
* Is the HQ teacher report reflecting your core content teachers and paraprofessionals along with their reporting HQ status accurately?
* Are all the expected staff records included in the Human Resources Snapshot Records report?
* Is the special education staff report accurately showing all of your district’s special education staff if reported by your administrative unit? (*Note- this report shows data from the current Special Education December Count snapshot, which may not be finalized data)*

**Not a complete list of what you should check; suggest reviewing and verifying all reports**

* Once **all** data has been verified and you no longer have any errors, submit approval of your data to CDE
  + - The staff member in your district with a role of LEAAPPROVER must do this
    - To submit (approve): select Staff Profile -> Status Dashboard -> Submit to CDE
    - To verify data has been submitted/approved: select Staff Profile -> Status Dashboard
      * Data Exists = Y (yes)
      * Data Locked = Y (yes)
      * Overall Status = S (submitted) or A (state accepted file)
    - See [Status Dashboard Screen example](#_Status_Dashboard_Screen)
* Print the Human Resources verification form for your district (Sign-Off) form:
  + - In Pipeline: Staff Profile -> Status Dashboard -> Download Sign Off Form
    - Your Superintendent will need to sign this

**Signed Human Resources verification form**

* Ask Superintendent of Education to sign the “Verification of Human Resources Data”
* Fax or email signed Human Resources verification form for your district to Annette Severson at 303-866-6888

# Diagram of Adding to Human Resources Snapshot

* ERRORS
* EDIDs in both
* Special Ed Flag = 0
* Employed on Dec 1st

Meets snapshot criteria: add to

**Important!**

**Must create (or re-create snapshot) in order to have an EDID included in the snapshot and have any changes you made reflected in the snapshot**

# Flowchart of process:

**Profile and Assignment:**

**Add/change record**

Record NOT added to or updated in snapshot

**Create or re-create Human Resource snapshot**

Are Profile and Assignment Files Error-free?

No

Yes

Record NOT added to or updated in snapshot

Does record meet criteria for inclusion in snapshot?

No

Yes

Record added to snapshot

Record added/updated in Human Resources snapshot

Is there a snapshot level error? (Warnings OK)

But must correct

Yes

No

# Identity Management Roles

***Note*:** For reporting general education staff, all roles will have the 4 digit LEA code and not a 5 digit administrative unit code.

For uploading and editing files: Submit and Modify Role **LEAUSER**

*Example:*

Staff Profile: WESTMINSTER\_50 PIPELINE-0070-STF~LEAUSER Submit and Modify Role

Human Resources: SILVERTON\_1 PIPELINE-2820-HRD~LEAUSER Submit and Modify Role

Reviewing data only: Read only role (cannot edit data) **LEAVIEWER**

*Example:*

Staff Profile: DOUGLAS\_RE1 PIPELINE-0070-STF~LEAVIEWER Read-Only Role

Human Resources: SHERIDAN\_2 PIPELINE-0123-HRD~LEAVIEWER Read-Only Role

Sign off on Human Resources: Approver Role **LEAAPROVER**

*Example:*

Staff Profile: N/A

Human Resources: BOULDER\_RE2\_BOULDER PIPELINE-07020-HRD~LEAAPPROVER Approver Role

# 

# Data Files

* Pipeline only accepts file extensions of: csv txt xls xlsx
* You need a header row (in first row)
* Pipeline only accepts field delimiters of: , | ~
* Include leading zeros (0) for required fields (for instance 01 or 02 for gender)
* Non-numeric/non-letter characters (except underscore) should not be included in file names as they can cause problems due to the fact that they have special system meanings. # is one of them.
* Spaces should not be in file name
* Do not edit a text file with Excel; you may lose preceding zeros.
* Remove any blank last lines
* Save files for reference and perhaps re-loading
* **Back-up before editing/changing a file**:
  + Can use backup file if you make a mistake (for instance lose preceding zeros)

***Example:***

1. Before making any changes to the staff profile file used for Human Resources, StaffProfile2014\_080114.xlsx on 8/16/14, I create a copy of that file, naming it StaffProfile2014\_081614.xlsx
2. I then modify the latter, StaffProfile2014\_081614.xlsx
3. If I make a major mistake to that file (for instance inadvertently delete LASIDs), I can revert back to StaffProfile2014\_080114.xlsx.
4. Again before I make any changes, I would first rename it to the current date, for instance, StaffProfile2014\_102614.xlsx and edit that new file.

# Naming Conventions

Highly recommended to have a naming convention for all files loaded to the Staff Interchange

Include versioning so you know what changes have been made to the data

***Example:***

StaffProfile2014\_080114.xlsx (the staff profile file is for the 2014 year and was created/modified on 8/01/14.

# 

# Profile file completed sample email:

File Upload Summary Email

-----Original Message-----

From: CDE PROD [mailto:Data\_Pipeline@cde.state.co.us]

Sent: Monday, October 27, 2014 1:11 PM

To: CDE PROD

Cc: Severson, Annette

Subject: Staff Profile: Upload File Successfully Submitted

File Upload Summary Email

Staff Profile & Assignments and Snapshots Data Upload Processed by Data Pipeline for School year 2014-15:

Submission ID: 104633

Date: 10/27/2014 01:03 PM

Collection Type: Staff Demographic Information

Name: Happy Worker

User ID: happyworker@somedistrictschools.org

Email: happyworker@somedistrictschools.org

Phone: ()--

Record Count: 5648

Error Count: 1

Data Pipeline can be accessed here: <https://cdx.cde.state.co.us/pipeline>

# Staff Assignment file completed sample email:

-----Original Message-----  
From: CDE PROD [mailto:Data\_Pipeline@cde.state.co.us]   
Sent: Friday, October 24, 2014 1:16 PM  
To: CDE PROD  
Cc: Severson, Annette  
Subject: Staff Assignment Association: File Successfully Submitted

File Upload Summary Email

Staff Profile & Assignments and Snapshots Data Upload Processed by Data Pipeline for School year 2014-15:

Submission ID: 104303

Date: 10/24/2014 01:15 PM

Collection Type: Staff Assignment Information

Name: Awesome Worker

User ID: [worker\_a@anotherdistrict.org](mailto:worker_a@anotherdistrict.org)

Email: worker\_a@anotherdistrict.org

Phone: ()--

Record Count: 50

Error Count: 20

Data Pipeline can be accessed here: <https://cdx.cde.state.co.us/pipeline>

# File Error Example Email:

-----Original Message-----  
From: Data Pipeline [mailto:Data\_Pipeline@cde.state.co.us]   
Sent: Wednesday, October 15, 2014 11:36 AM  
To: Staff Respondent  
Subject: Data Pipeline File Upload Errors

-----------------------------------------------------------------------

This message is to notify you of the Data Pipeline file upload errors. The errors must be corrected and the file must be uploaded again.

-----------------------------------------------------------------------

File Submission Processed by Data Pipeline:

Submission ID: 33916

Date: 10/15/2014 11:36 AM

Name: Staff Respondent

Year: 2015

User ID: [respondent\_staff@anotherdistrict.org](mailto:respondent_staff@anotherdistrict.org)

Error: Error in file upload with batch id: 33916

Error Details:

Line 2: data too large for Educator Preparation Program: 000000 (5 max length) ,Educator Preparation Program

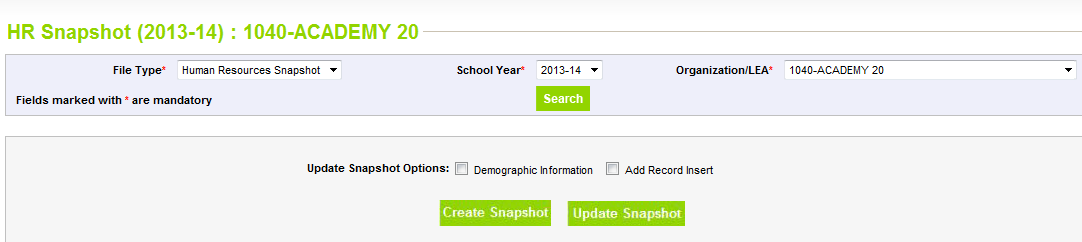
Please correct your errors and upload the file again.

-----------------------------------------------------------------------

# Creating Human Resources snapshot

You can always use the “Create Snapshot” option to create or re-create your Human resources snapshot. It may avoid confusion with what is updated and/or added using the “Update Snapshot Option.”

An explanation of the snapshot options:



**Create Snapshot: Suggested to be used throughout process to ensure most up-to-date records are used in the snapshot.**

**Update Snapshot Options:**

**Demographic Information**

If you created a snapshot and then changed Staff Profile or Staff Assignment data, you can select this option to update the snapshot with the changes.

**IMPORTANT!**

It will not add any new records; only update records already in the snapshot.

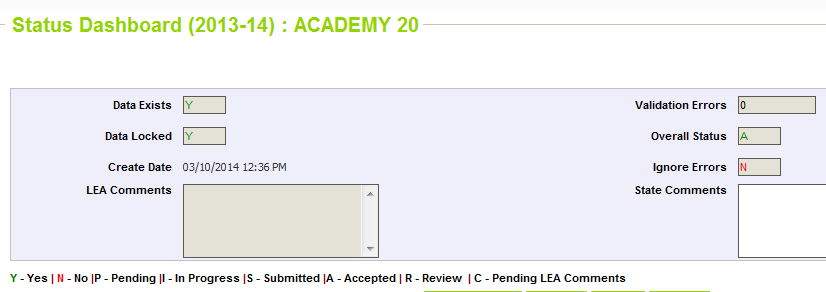
**Add Record Insert**

If you created a snapshot and added new staff profile and/or staff assignment records, you can use this option to add the new records only to the snapshot.

**IMPORTANT!**  
No existing records will be updated

# Status Dashboard Screen Example

* Human Resources file submitted by LEA; Overall Status = S



S

**(2014-2015) Happy District**