



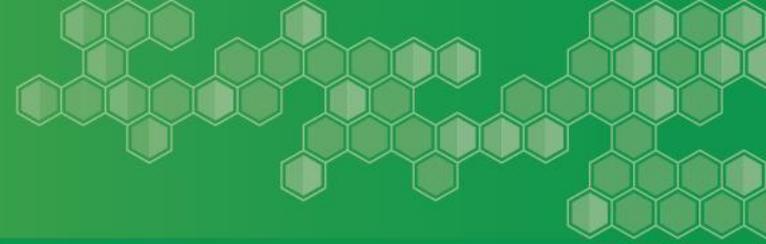
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**COLORADO**  
Department of Education

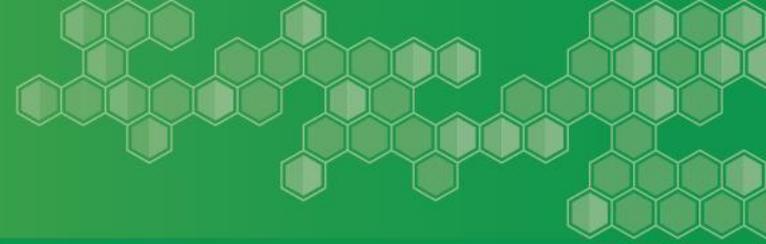
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# EDIS Batch File Submission Training

EDIS Batch FILE SUBMISSION



# EDIS Batch File Submission Training 2020



## EDIS Batch

### Purpose of EDIS Batch Submission

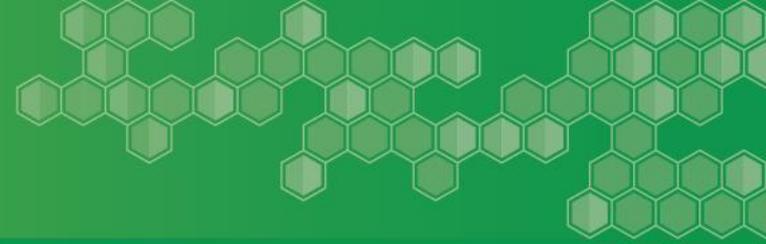
- The purpose of the EDIS Batch Submission is to update the information in EDIS, based on what is in your Human Resources System. Thus the record in your HR System is presented the same way in EDIS and EDIS matches your HR System.
- Saves time by updating a large group of educators at one time, or your entire educator staff.
- By cleaning up the data through an EDIS Batch Submission your efforts will pay off by reducing the possible EDID errors in the Staff Interchange, HR Collection, etc.
- Creates more efficiency with the users workload



**The goal of this training is to help Districts/Local Education Agencies (LEAs) update EDIDs more efficiently and accurately.**

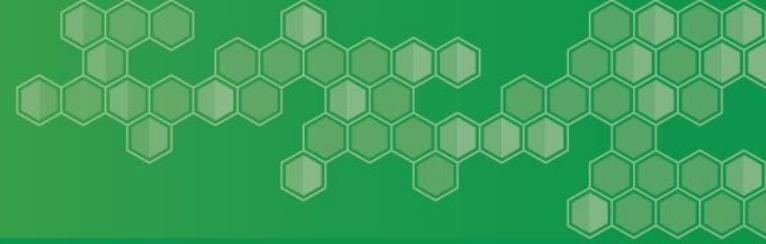
**This training will include:**

- ◇ EDIS Batch File Layout Specifications
  - ◇ Submitting an EDIS Batch file
    - ◇ Batch Maintenance
    - ◇ Validation Report
    - ◇ Editing a Record
  - ◇ Submitting to EDIS



## Tips and Tricks

-  You may submit an EDIS Batch file anytime of the year regardless of what the school year reads.
-  It can take up to several days during the busy time of the year (August – mid November), due to heavy volume, for records in case management to be reviewed.
-  Follow the EDIS Batch File Layout Protocol when submitting an EDIS Batch File. [http://www.cde.state.co.us/datapipeline/yr\\_edis](http://www.cde.state.co.us/datapipeline/yr_edis)
-  You must go to the EDIT Record Screen in order to correct any errors in the file.
-  To check the status of your submitted records always check the EDID Download Report



## Access to the EDIS System –

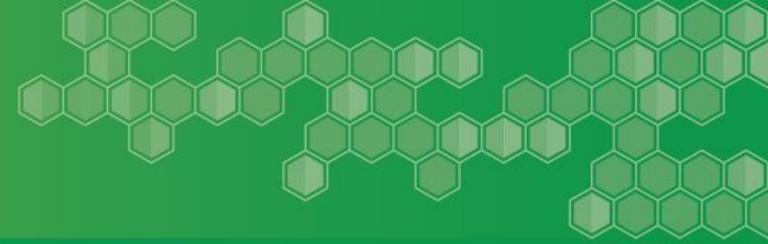
To submit and update records via Data Pipeline your district's Local Access Manager (LAM) must grant you permissions under the role of "district admin"

To request access please go to this link:

<https://www.cde.state.co.us/idm>



# EDIS Batch Submission Training

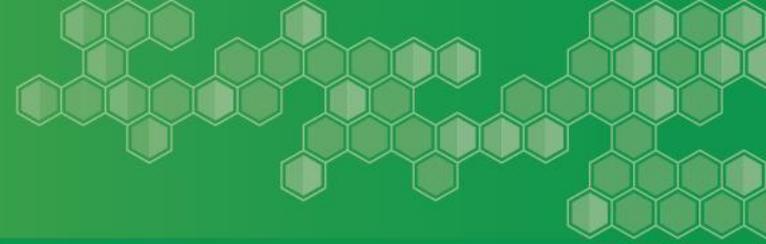


To log into Data Pipeline to submit an EDIS Batch File you will use this link: <https://www.cde.state.co.us/idm>

You can bookmark this link for easier access.

Click on Data Pipeline → Log in to Data Pipeline

Log in to Data Pipeline



## **BUILDING THE EDIS Batch File**

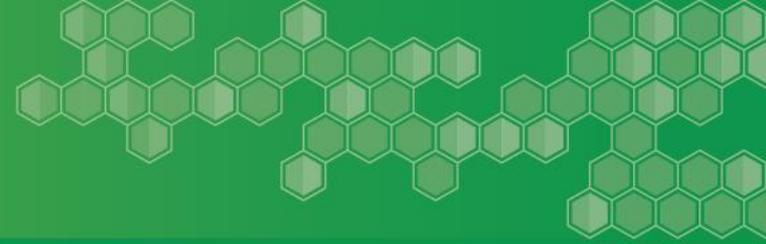
To prepare the EDIS Batch File follow your vendor's instructions for automatic export from your Human Resource System. If your district is not set up for an automated EDIS Batch export you will need to build the file yourself following the EDIS Batch File Layout Specifications.

In a Batch Submission you will include the EDID; remember you are updating on the existing EDID. The LAEDID is an optional field.

File Layouts can be found at the following link:

[http://www.cde.state.co.us/datapipeline/yr\\_edis](http://www.cde.state.co.us/datapipeline/yr_edis)



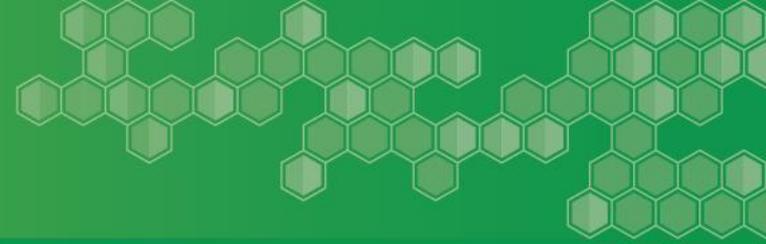


## **BUILDING THE EDIS Batch File**

You may submit a file in these three formatting choices:

- Text file
- Excel file - must include a header row with text
- CSV File - must include a header row with text

The naming conventions of the file is determined by the user, with the exception of the use of spaces in the file name - spaces are NOT allowed. Once your file is complete save it to a place that you will remember.

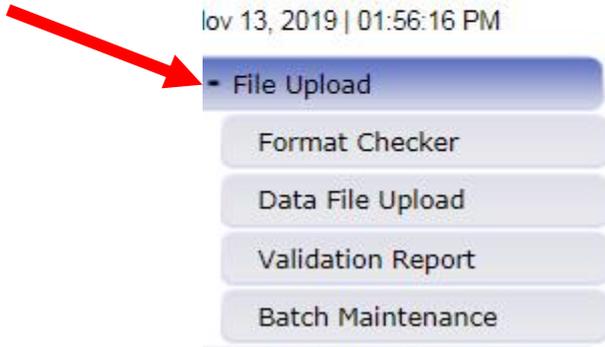


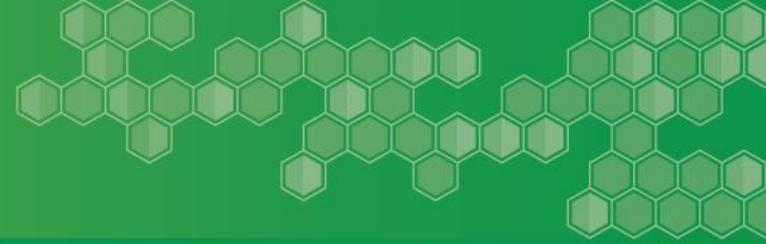
## FILE UPLOAD

Click on File Upload- this will open up more choices. We will discuss each sub header as we progress in the training.



lov 13, 2019 | 01:56:16 PM





## FILE UPLOAD

### NEXT STEP: Click on Format Checker

Format Checker checks the first row (not your header row) of your file for formatting errors. The system is not checking the formatting of the entire file ONLY the first row.

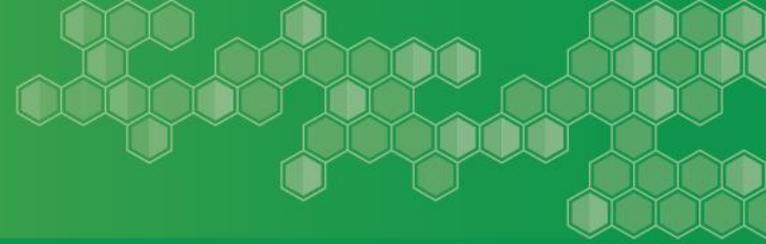
1. Choose your Data Set- EDIS
2. File Type - In this case EDIS Batch
3. School year - current school year
4. Browse to where you saved your file
5. Click Upload

#### – Format Checker

The screenshot shows a web interface for file upload. On the left, a sidebar menu has five items: 'File Upload' (expanded), 'Format Checker' (highlighted in blue), 'Data File Upload', 'Validation Report', and 'Batch Maintenance'. The main content area is titled 'Format Checker' and contains the following fields:

- Dataset \***: A dropdown menu with 'EDIS' selected.
- File Type \***: A dropdown menu with 'EDIS Batch' selected.
- School Year \***: A dropdown menu with '2019-20' selected.
- File Name \***: A text input field with a 'Choose File' button and the text 'No file chosen'.
- Upload**: A green button at the bottom.



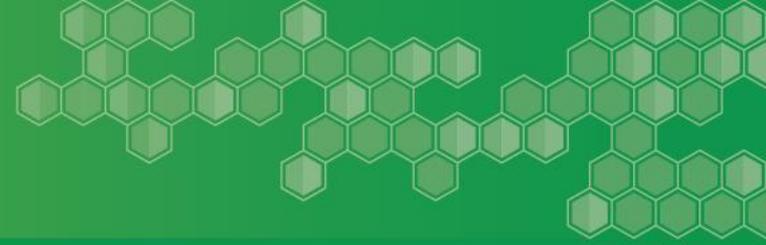


## FORMAT CHECKER

The screen will display formatting errors in the first row of your file (not your header row); these errors will be highlighted in red. You will need to go back to your file and correct any formatting errors. Remember to correct your source system as well.

If you have many errors it might be best to correct in your source system and resubmit a file to the Format Checker.

If you have no errors in your file then the screen will show passed in green (see next slide).



## FORMAT CHECKER

Logo

### Format Checker

Dataset \*

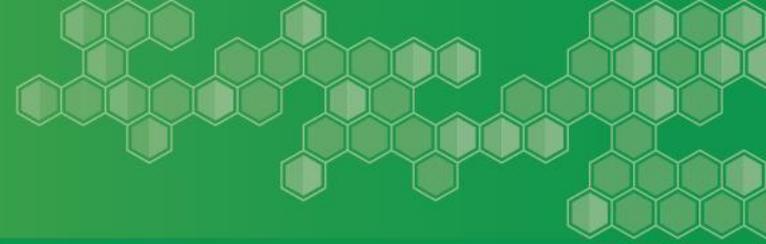
File Type \*

School Year \*

File Name \*  No file chosen

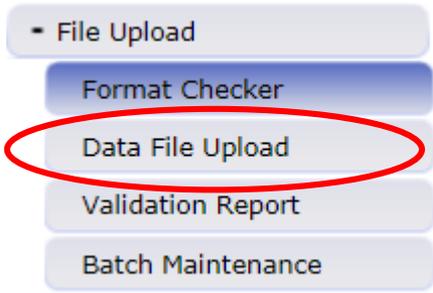
Data Element Name	Excel Column	Data Element Length	Original Length From File	Result
Edid	A2	8	8	Pass
Ssn Staff	B2	9	9	Pass
District Code	C2	4	4	Pass
Laedid	D2	10	10	Pass
Last Name Staff	E2	30	30	Pass
First Name Staff	F2	30	30	Pass
Middle Name Staff	G2	30	30	Pass
Birth Date Staff	H2	8	8	Pass
Gender Staff	I2	2	2	Pass





## DATA FILE UPLOAD

You are ready to upload your file –  
Choose Data File Upload



1. Choose your Data Set- EDIS
2. File Type – EDIS Batch
3. School year - current school year
4. Your district will automatically default
5. Browse to where you saved your file
6. Click Submit

### Data File Upload

Exception File

Dataset \*

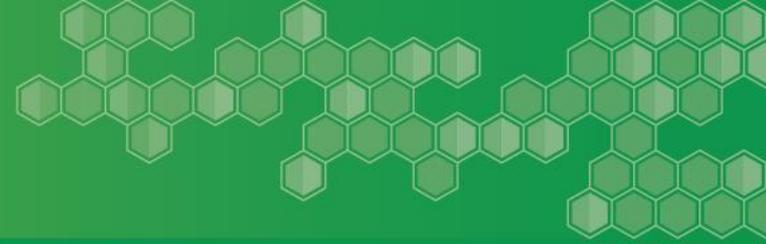
File Type \*

School Year \*

Organization/LEA \*

Locate File \*





Once submitted you will get this message:

[Log out](#)

### Data File Upload

The File Upload request has been successfully submitted. Batch ID for the submitted request is **362618**. An email will be sent after the processing is complete.

Exception File

Dataset\*

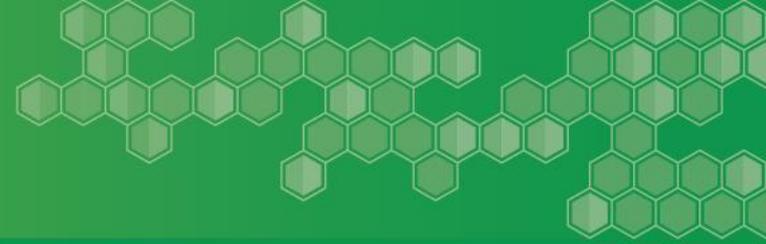
File Type\*

School Year\*

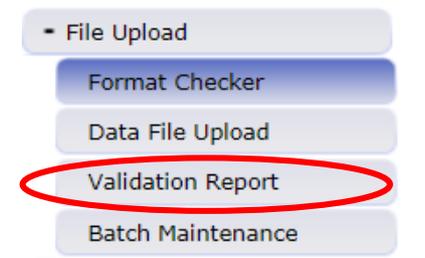
Organization/LEA\*

Locate File\*

You will want to jot down the Batch ID for reference

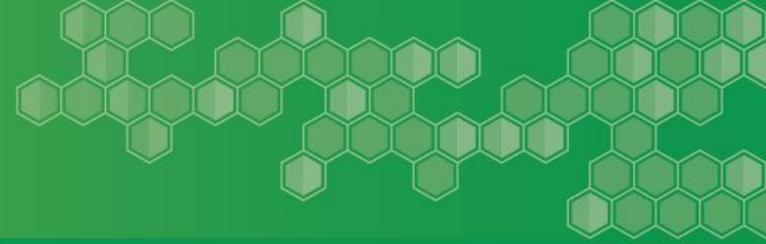


## Validation Report



1. Choose your Data Set- EDIS
2. File Type - In this case EDIS Batch
3. School year - current school year
4. Organization/LEA will populate with your district
5. Batch ID the one you just submitted
6. Click view Report

The Validation Report will show you what errors you have in your file. If there are no errors you will get a message telling you there are no errors in the batch. Below is an example in which the file has a few errors. This report just displays what the error(s) are in the file. You cannot fix any errors in this report.



## Validation Report

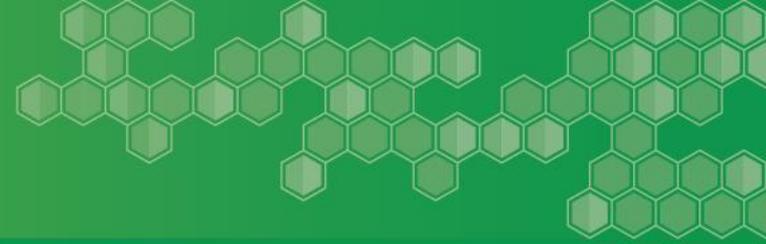
If you receive an error message and you only have a few errors, fix them and move on. If there are more than just a few errors go back to your file and correct the errors and resubmit the file. Always remember to correct your source system. You will correct errors in the Edit Record Screen

### Validation Report

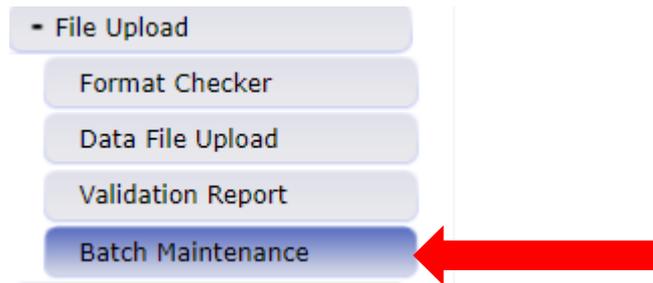
Dataset *	EDIS ▼	File Type *	EDIS Batch ▼
School Year *	2019-20 ▼	Organization/LEA *	1420-Jefferson County R-1 ▼
Batch Id *	362620 - 04/03/2020 09:35 AM ▼		
<a href="#">View Report</a>			

Error Code	Error Type	Error Message	Count
ED07	E	Last Name may only contain alpha characters, ', -, or spaces	1
ED10	E	Middle Name is mandatory. NOTE: Options for this field include the value NMN for no middle name	1



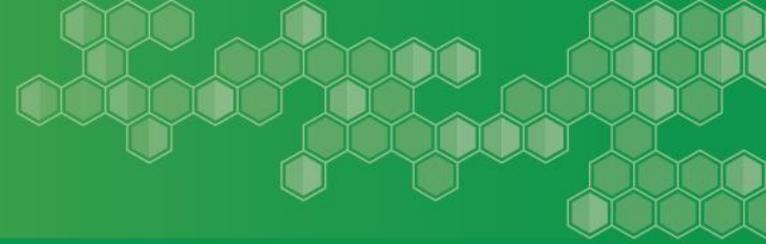


## Batch Maintenance



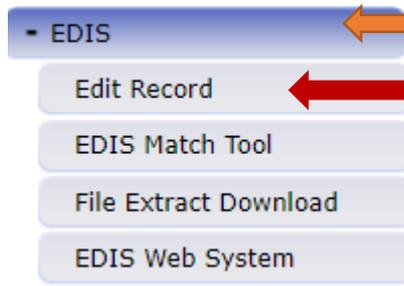
Batch Maintenance can be used when you want to see the error count and if your batch has processed.

If you have a need to delete the batch this can done in Batch Maintenance as well as downloading a submission.

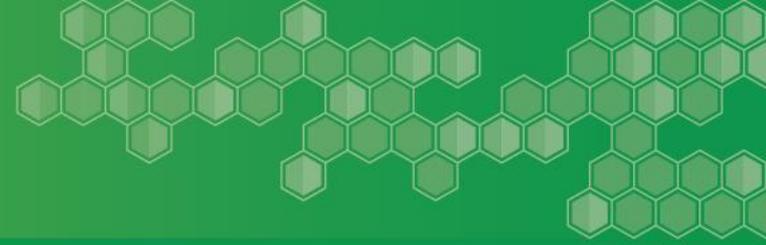


## Cleaning up errors displayed from the Validation Report

Click on the icon next to EDIS this will open up more screens.  
Choose Edit Record.

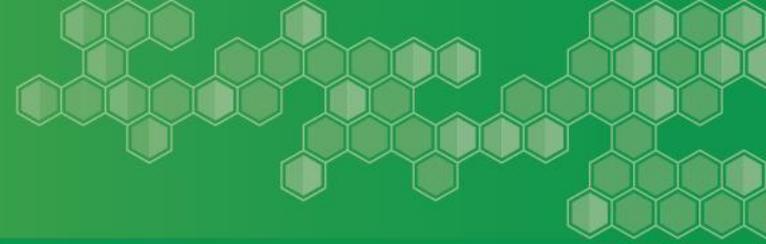


1. Click on EDIS
2. Click on Edit Record



## EDIT RECORD

- ☀ Choose File Type – EDIS Batch
- ☀ School Year – Current school year will auto populate
- ☀ Organization – Your district will auto populate
- ☀ Batch ID – Most current will be at the top of the list
- ☀ Error Records – All – selecting all will yield all of your records in the file
- ☀ YES – Selecting Yes will yield only records with errors
- ☀ NO – Selecting No will yield records with no errors



## EDIT RECORD

The File Type, School year, Organization, Batch ID and Error Records Fields must be populated

### Edit Record

Fields marked with \* are mandatory

File Type*	EDIS Batch ▼	School Year*	2019-20 ▼	Organization/LEA*	1420-Jefferson County R-1 ▼
Batch ID*	362620 - 04/03/2020 09:35 AM ▼	Error Records	All ▼	Error Records	All ▼

*Note: A red arrow points from the 'Error Records' dropdown menu to the 'All' option.*

EDID

Last Name

Gender

Social Security Number

First Name

Using the optional search fields such as EDID, First Name Last Name etc. you can find a single record within your file.

**Click SEARCH**





## EDIT RECORD

- ❖ Fields that have an error will show up in red. Errors must be corrected to submit to EDIS Web.
- ❖ Fields that have a warning will show up in yellow. Warnings do not need to be corrected to move onto EDIS Web.

Edit Record (2019-20) : 1420-Jefferson County R-1

#1 Last Name ▾ #2 First Name ▾ #3 EDID ▾ [Sort Data](#)

#2 dropdown menu options: First Name, Last Name, First Name, EDID

Fields shown in RED have an error

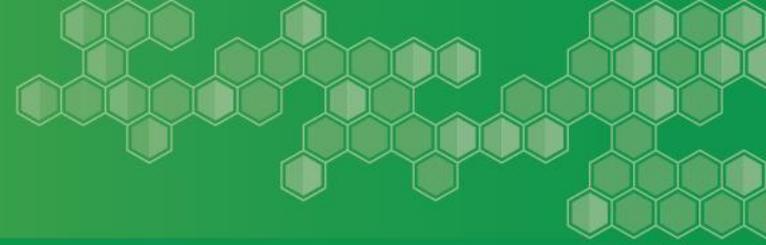
Total # of Records : 11

#	EDID	Social Security Number	School District/BOCES Code	LAEDID	Last Name	First Name	Middle Name	Date of Birth	Gen
4			1420-JEFFERSON COUNTY R-1 ▾	1420000008	Goliath	Gampson	Slip	07261957	02-Male
5			1420-JEFFERSON COUNTY R-1 ▾	1420000010	Pout	Pout	Fish	08241959	01-Fem
6			1420-JEFFERSON COUNTY R-1 ▾	1420000009	Princess	Cinderella	Slipper	08241959	01-Fem
7			1420-JEFFERSON COUNTY R-1 ▾	1420000003	Roadrunner	Speedy	G	03111990	02-Male
8			1420-JEFFERSON COUNTY R-1 ▾	1420000007	Shiny	Shower	Dirty	10101970	02-Male
9			1420-JEFFERSON COUNTY R-1 ▾	1420000001	Test	Tester	NMN	05231988	02-Male
10			1420-JEFFERSON COUNTY R-1 ▾	1420000006	Unicorn	Rainbow	Horn	04271981	01-Fem
11			1420-JEFFERSON COUNTY R-1 ▾	1420000002	XXX	YYY		04111991	01-Fem

Errors in red will need to be fixed before moving on

[Save](#) [Delete](#) [Submit to EDIS](#) [Back](#)





## EDIT RECORD

The optional sort order #1, #2, and #3 offers the user options to sort the rows displayed.

### Edit Record (2019-20) : 1420-Jefferson County R-1

Sort Order

#1  #2  #3

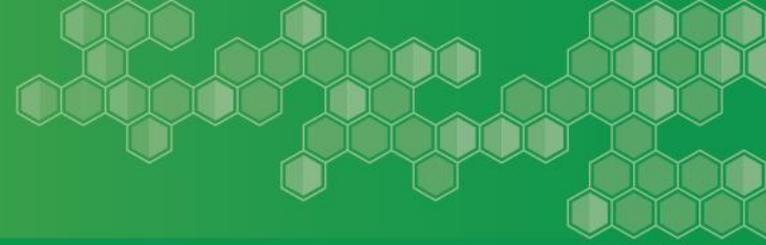
#2 dropdown menu:

Fields shown in RED have an error

Total # of Records : 11

	#	EDID	Social Security Number	School District/BOCES Code	LAEDID	Last Name
<input type="checkbox"/>	1	[REDACTED]	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000007	Dirty
<input type="checkbox"/>	2	[REDACTED]	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000004	Duck
<input type="checkbox"/>	3	[REDACTED]	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000005	Dumbledore
<input type="checkbox"/>	4	[REDACTED]	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000008	Goliath
<input type="checkbox"/>	5	[REDACTED]	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000010	Pout
<input type="checkbox"/>	6	[REDACTED]	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000009	Princess
<input type="checkbox"/>	7	[REDACTED]	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000003	Roadrunner
<input type="checkbox"/>	8	[REDACTED]	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000007	Shiny
<input type="checkbox"/>	9	[REDACTED]	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000004	T...





## EDIT RECORD

To correct the errors you need to click the box in each row that needs correcting.

Fix the error(s) in red and click SAVE, you must click save before moving onto the next page if not your changes will not be saved.

- Edit Record (2019-20) : 1420-Jefferson County R-1

Sort Order

#1 Last Name ▾ #2 First Name ▾ #3 EDID ▾ [Sort Data](#)

Fields shown in RED have an error

Total # of Records : 11

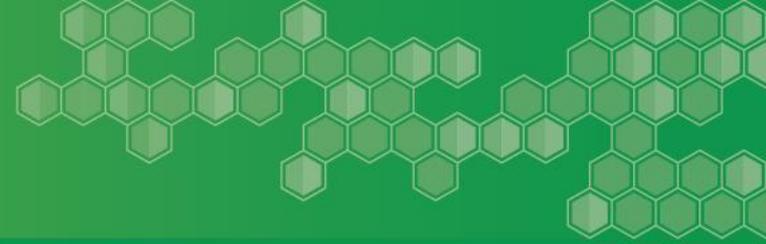
[Go to Standard View](#)

#	EDID	Social Security Number	School District/BOCES Code	LAEDID	Last Name	First Name	Middle Name	Date of Birth	Gen
<input checked="" type="checkbox"/>	4		1420-JEFFERSON COUNTY R-1 ▾	1420000008	Goliath.	Sampson	Giant	09091968	02-Male
<input type="checkbox"/>	5		1420-JEFFERSON COUNTY R-1 ▾	1420000010	Pout	Pout	Fish	07261957	01-Fem
<input type="checkbox"/>	6		1420-JEFFERSON COUNTY R-1 ▾	1420000009	Princess	Cinderella	Slipper	08241959	01-Fem
<input type="checkbox"/>	7		1420-JEFFERSON COUNTY R-1 ▾	1420000003	Roadrunner	Speedy	G	03111990	02-Male
<input type="checkbox"/>	8		1420-JEFFERSON COUNTY R-1 ▾	1420000007	Shiny	Shower	Dirty	10101970	02-Male
<input type="checkbox"/>	9		1420-JEFFERSON COUNTY R-1 ▾	1420000001	Test	Tester	NMN	05231988	02-Male
<input type="checkbox"/>	10		1420-JEFFERSON COUNTY R-1 ▾	1420000006	Unicorn	Rainbow	Horn	12271981	01-Fem
<input checked="" type="checkbox"/>	11		1420-JEFFERSON COUNTY R-1 ▾	1420000002	XXX	YYY		04111991	01-Fem

Page 1 of 1 [⏪](#) [⏩](#) 25 ▾ Per Page

[Save](#) [Delete](#) [Submit to EDIS](#) [⏪ Back](#)



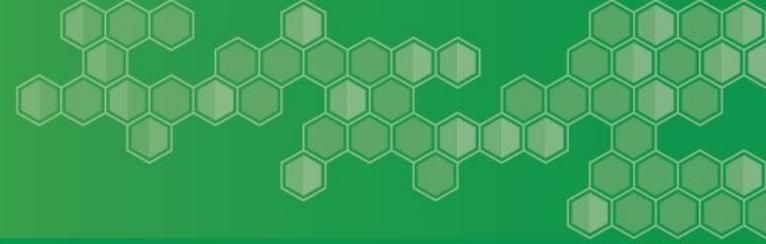


## EDIT RECORD

- ✓ You may delete a record in this screen. Check the box on the record that you would like to delete, click delete. You will get a message saying the record deleted successfully.
- ✓ If you have many errors in the file it may be better to clean up all your errors in your file then resubmit the batch.
- ✓ Remember that you need to update/correct your data in your source system as well.



# EDIS Batch Submission Training



Once your errors are resolved, you are ready to submit your file to EDIS Web.

## Edit Record (2019-20) : 1420-Jefferson County R-1

2 record(s) updated successfully. Reminder: Please update these changes in your source system as well.

Sort Order

#1  #2  #3

Fields shown in RED have an error

Total # of Records : 11

#	EDID	Social Security Number	School District/BOCES Code	LAEDID	Last Name	First Name	Middle Name	Date of Birth	Gen
<input type="checkbox"/>	1	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000007	Dirty	Shower	Grimy	10101970	02-Male
<input type="checkbox"/>	2	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000004	Duck	Daffy	D	02121989	01-Fem
<input type="checkbox"/>	3	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000005	Dumbledore	Potter	H	01011955	02-Male
<input type="checkbox"/>	4	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000008	Goliath	Sampson	Giant	09091968	02-Male
<input type="checkbox"/>	5	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000010	Pout	Pout	Fish	07261957	01-Fem
<input type="checkbox"/>	6	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000009	Princess	Cinderella	Slipper	08241959	01-Fem
<input type="checkbox"/>	7	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000003	Roadrunner	Speedy	G	03111990	02-Male
<input type="checkbox"/>	8	[REDACTED]	1420-JEFFERSON COUNTY R-1	1420000007	Shiny	Shower	Dirty	10101970	02-Male

Page 1 of 1   25 Per Page

This message will pop up - Click OK

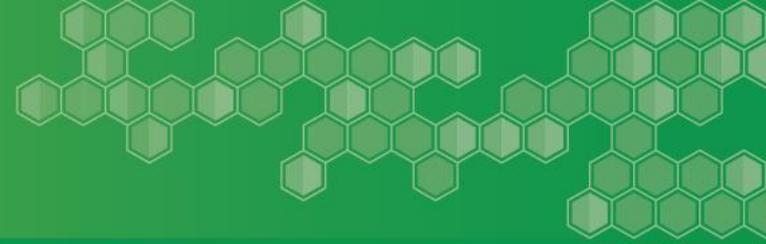
idmqa.cde.state.co.us says

Are you sure you would like to submit data to the EDIS System?





# EDIS Batch Submission Training



You will receive an email along with this message on your screen:

— **Edit Record (2019-20) : 1420-Jefferson County R-1** —

**Data has been submitted to the EDIS System.**

This is a notification email that the matching engine has completed processing for the following submission.

Submission Processed by Data Pipeline:

Submission ID: 362620

Submitted Record Count: 11

Collection Type: EDIS Batch

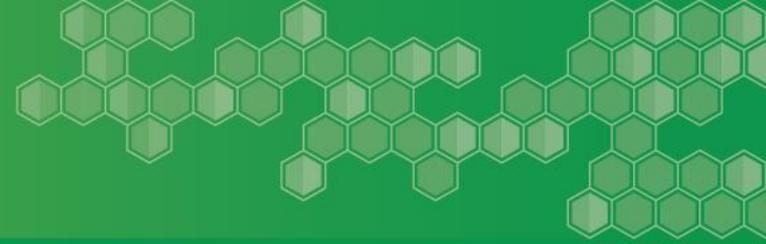
District: 1420-Jefferson County R-1

User ID: [puccetti\\_d@cde.state.co.us](mailto:puccetti_d@cde.state.co.us)

Data Pipeline can be accessed here

<https://cdx-test.cde.state.co.us/pipeline>





Once you click on Submit to EDIS, the file will then populate the EDID Download Report in the EDIS Web System

## **EDID Download Report**

The EDID Download Report can be found in the EDIS Web application. <https://www.cde.state.co.us/idm/edis>

\* Please note this is outside of the Pipeline page.

Reports are on the left under the navigation links.

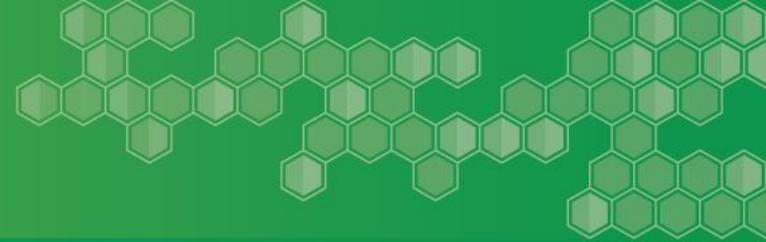
### **Reports**

[Educator Activity Report](#)

[Taken Educators Report](#)

[Educator History Report](#)

[EDIS Download Report](#)



## EDID Download Report

Upon navigating to the EDID Download Report you will need to find your file that you submitted:

Your district will automatically default to open in the Organization Dropdown

Case type gives you three options to choose: READ, Batch and Web. However you submitted your records they will always flow into the EDID Download Report. In this training we submitted via Batch

**EDID Download Report**

The State Assigned Educator ID (EDID) Download Report pop up dialog box comes up you have to select "Open this file"

**DOWNLOAD THIS REPORT** - Select a Data Pipeline Batch ID & Date

**CHANGE OR SORT THE REPORT DATA** - Select the Organization

**DOWNLOAD NOTICE** - If your PC is behind a server or firewall

**Organization**  
Jefferson County R-1

**Case Type (Select Case Type)**  
Batch

**Data Pipeline Batch ID & Date**  
Select RequestID

When you click on the carat for Data Pipeline Batch ID & Date your batch will be at the top of the list

**EDID Download Report**

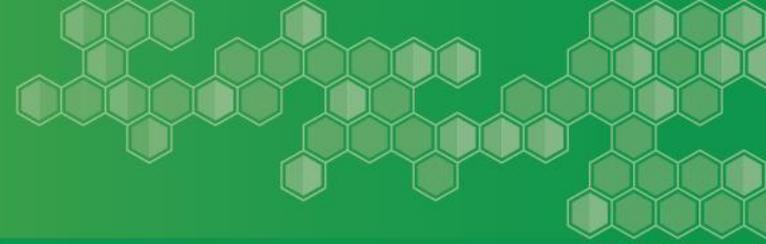
Select RequestID

B362620	- [ 04/03/20 (F) ]
B36687	- [ 11/30/18 (F) ]
B19257	- [ 10/05/18 (F) ]
B53365	- [ 11/16/17 (F) ]
B29088	- [ 09/06/17 (F) ]
B70302	- [ 11/16/16 (F) ]
B57190	- [ 10/13/16 (F) ]
B81952	- [ 10/27/15 (F) ]
B69600	- [ 09/11/15 (F) ]
B09962	- [ 11/10/14 (F) ]
B9503	- [ 09/05/14 (F) ]
B1179	- [ 12/16/13 (F) ]
14201013	- [ 05/03/13 (F) ]
14200913	- [ 03/22/13 (F) ]
14200813	- [ 11/30/12 (F) ]
14200713	- [ 11/13/12 (F) ]
14200413	- [ 10/09/12 (F) ]
14200313	- [ 10/05/12 (F) ]
14200213	- [ 09/20/12 (F) ]

Select RequestID







## EDID Download Report

The EDID Download Report can also be downloaded, there are three file formats when downloading: CSV, Fixed Length and Tab Delimited. You can also choose to include the full SSN in your download file.

Download Report Containing Full SSN

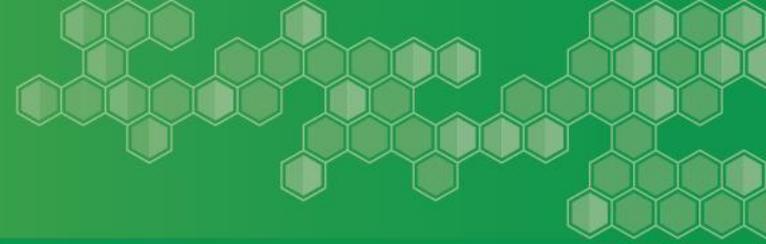
Download File Format

CSV  
CSV  
Fixed Length  
Tab Delimited

Sort order 1,2,3 and 4 gives the users the sorting capability within the records submitted

Sort Data

SortOrder1: LastName  
SortOrder2: FirstName  
SortOrder3: DOB  
SortOrder4: Last Organization to Update  
EDID  
LAEDID  
SubmittedOrder  
CaseType



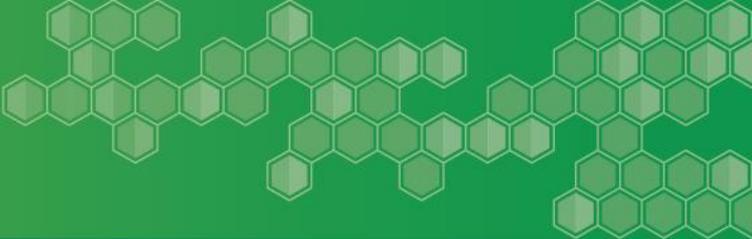
## EDID Download Report

When viewing the records submitted you will notice that there are two case types.

Review – the record went to case management and the EDIS Consultant will need to look at it.

Update – The record was updated on an existing EDID in the system. The record will indicate which EDID it was updated upon.

The records that are under review have a case ID number assigned to them, if you needed to communicate about that record you could do so in email. Such as – please expedite case 611412 needed for collection. Case 611382 DOB is 09/08/1962 please adjust. Case 611278 needs to be removed from case management. **Just remember NO PII in emails!**



## EDID Download Report

Case ID assigned to each open record in review

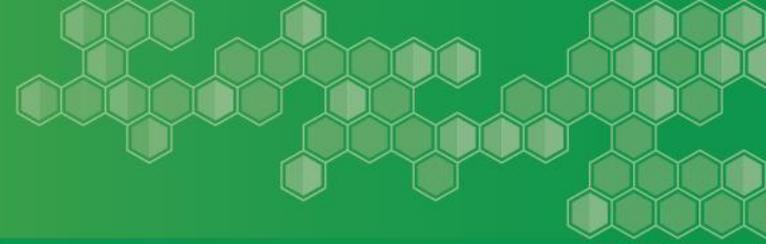
2 case types

Total number of records: 11

EDID	Last Name	First Name	Middle Name	DOB	Gender	SSN	Last Organization to Update LAEDID	Case Type	Case ID	Status
[REDACTED]	Duck	Daffy	D	02/12/1989	Female	[REDACTED]	Jefferson County R-1	Update		
[REDACTED]	Dumbledore	Potter	H	01/01/1955	Male	[REDACTED]	Jefferson County R-1	Update		
[REDACTED]	Goliath	Sampson	Giant	09/09/1968	Male	[REDACTED]	Jefferson County R-1	Update		
[REDACTED]	Pout	Pout	Fish	07/26/1957	Female	[REDACTED]	Jefferson County R-1	<b>Review</b>	611412	Open
[REDACTED]	Princess	Cinderella	Slipper	08/24/1959	Female	[REDACTED]	Jefferson County R-1	Update		
[REDACTED]	Roadrunner	Speedy	G	03/11/1990	Male	[REDACTED]	Jefferson County R-1	Update		
[REDACTED]	Shiny	Shower	Dirty	10/10/1970	Male	[REDACTED]	Jefferson County R-1	Update		
[REDACTED]	Test	Tester	NMN	05/23/1988	Male	[REDACTED]	Jefferson County R-1	Update		
[REDACTED]	Unicorn	Rainbow	Horn	12/27/1981	Female	[REDACTED]	Jefferson County R-1	Update		
[REDACTED]	XXX	YYY	NMN	04/11/1991	Female	[REDACTED]	Jefferson County R-1	Update		

Once the record is processed the status will change from open to closed





Should you have further questions please contact:

Debbie Puccetti  
EDIS Consultant

[Puccetti\\_d@cde.state.co.us](mailto:Puccetti_d@cde.state.co.us)

303-866-6612

This training as well as other information can be found at the following website:

[http://www.cde.state.co.us/datapipeline/yr\\_rits](http://www.cde.state.co.us/datapipeline/yr_rits)