



# Staff Interchange Process

## Contents

Overview .....	2
What is the Staff Interchange? .....	2
Structure of Reporting Staff .....	2
Checklist of Steps .....	3
Identity Management Roles.....	13
Data Files.....	13
Naming Conventions.....	14
Profile file completed sample email: .....	14
Staff Assignment file completed sample email:.....	15
File Error Example Email: .....	16



## Staff Interchange Process

### Overview

The following instructions are provided as a tool to help you download prior year data files for reference, load staff interchange data files into Data Pipeline, review errors, and correct errors in order to continue with the Human Resources and/or Special Education December Count snapshots.

### What is the Staff Interchange?

The staff interchange is a set of two files which contain all staff data for a school year. The staff interchange contains the two files: staff profile and staff assignment which collects the staff demographics, background and current assignment(s). This information is used in the following snapshots: Human Resources, Special Education December Count and the Teacher Student Data Link.

**Staff Profile:** The purpose of the Staff Profile file is to capture and verify the attributes of staff employed at the district for the currently selected school year.

**Staff Assignment:** The purpose of the Staff Assignment Association file is to capture and verify the location and role(s) of staff employed at the district for the currently selected school year.

Please note: the Human Resources and Special Education December Count collects all General Education staff and Special Education staff employed as of December 1<sup>st</sup> of the school year by school, district and position. The Teacher Student Data Link references the staff profile file for educators employed throughout the school year. Districts and BOCES complete the Human Resources and Teacher Student Data Link processes. Administrative Units complete the Special Education December Count process.

### Structure of Reporting Staff

General education staff is reported by the District/BOCES of location of employment. This would include contracted staff through another entity.

Special Education Staff can be reported by EITHER the district/BOCES of location or the Administrative Unit. This must be determined locally and agreed upon by all impacted entities. If the District/BOCES is reporting the staff member, then the AU should not be report that staff member and vice versa.

## Staff Interchange Process

### Checklist of Steps

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

#### EDIS Process

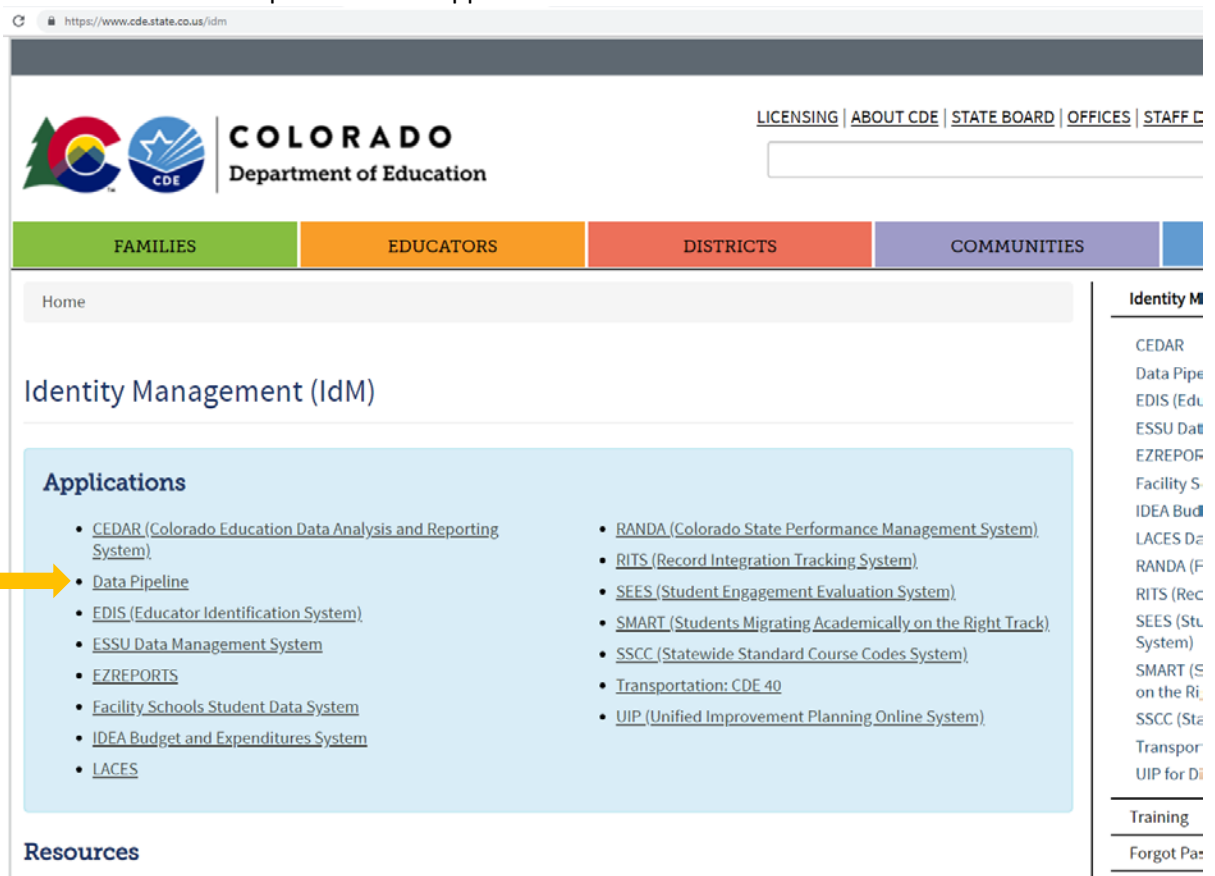
- Obtain Educator IDs (EDIDs) for all staff - EDIS
- If applicable, update EDIS for legal name change(s)

Note: All staff should have a unique Educator Identifier (EDID). For additional information, please reference:

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

#### Identity Management Role

- To download prior year data files, upload and/or edit Staff Interchange files in Data Pipeline, you will need to have a role in [Identity Management \(IdM\)](#) : STF~LEAUSER Submit and Modify Role
  - o 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://cdx.cde.state.co.us/CDEIdM/districtLAMSsupport.jsp> for assistance.
  - o Access Data Pipeline at: <https://www.cde.state.co.us/idm>
    - Select 'Data Pipeline' under Applications



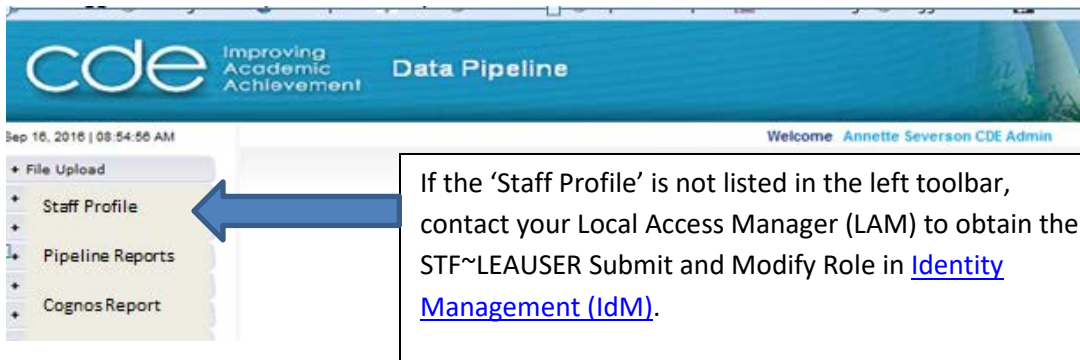
The screenshot shows the Identity Management (IdM) interface. At the top, there is a navigation bar with links for LICENSING, ABOUT CDE, STATE BOARD, OFFICES, and STAFF. Below this is a main navigation bar with tabs for FAMILIES, EDUCATORS (selected), DISTRICTS, and COMMUNITIES. The main content area is titled 'Identity Management (IdM)' and features a section for 'Applications' with a list of systems. A yellow arrow points to 'Data Pipeline' in this list. The right sidebar contains a list of system links: CEDAR, Data Pipeline, EDIS (Educator Identification System), ESSU Data Management System, EZREPORTS, Facility Schools Student Data System, IDEA Budget and Expenditures System, LACES, RANDA (Colorado State Performance Management System), RITS (Record Integration Tracking System), SEES (Student Engagement Evaluation System), SMART (Students Migrating Academically on the Right Track), SSCC (Statewide Standard Course Codes System), Transportation: CDE 40, and UIP (Unified Improvement Planning Online System). At the bottom of the sidebar, there are links for Training and Forgot Password.

## Staff Interchange Process

- Log into Data Pipeline
  - User Name is full email address
  - Password is created by you (the respondent)
  - If password is unknown, use link 'I forgot my password'



- Once logged into Data Pipeline, ensure you have the 'Staff Profile' tab on the left side



### Create Data Files

- Review documents which show the file layouts and the definitions of the file elements at [http://www.cde.state.co.us/datapipeline/inter\\_staff](http://www.cde.state.co.us/datapipeline/inter_staff)
  - Staff File
  - Staff Assignment File
- Create or extract from your Staff data source the two Staff files (See sections below entitled "Data Files" and "Naming Conventions" for file naming tips to avoid receiving file load errors):
  - Staff Profile File
  - Staff Assignment File

## Staff Interchange Process

- There are also templates at [http://www.cde.state.co.us/datapipeline/inter\\_staff](http://www.cde.state.co.us/datapipeline/inter_staff) which have the fields you need to load
- Optional:* To download prior year data files uploaded by the LEA, Select the “Staff Profile” then “File Extract Download”. These downloaded files need to be updated to match current year file layout process and to reflect current employees at the district/BOCES.



- In the File Extract Download screen:
  - First select the file type; a) Staff or b) Staff Assignment
  - Choose the school year needed
  - Organization/LEA will be pre-populated based on your log in information
  - Select the batch ID. If there are several options, you may want to download them all
  - Select the Extract Type; a)Staff Profile or b)Staff Assignment
  - File Content Type: Choose either an Excel file or CSV file to have the file downloaded in the chosen format.
  - Click ‘Download Standard Extract’ (green button on the bottom)

[Logout](#)

### File Extract Download

File Type * <input style="width: 80%;" type="text" value="Select..."/>	School Year * <input style="width: 80%;" type="text" value="Select..."/>	Organization/LEA * <input style="width: 80%;" type="text" value="Select..."/>
Batch ID <input style="width: 80%;" type="text" value="All"/>	Extract Type <input style="width: 80%;" type="text" value="Select..."/>	File Content Type <input style="width: 80%;" type="text" value="Select..."/>
Records Edited Online <input style="width: 80%;" type="text" value="All Records"/>		

Fields marked with \* are mandatory

Download Standard Extract

## Staff Interchange Process

### Uploading Data Files

- Prior to uploading the data files, the format should be verified. To do so in Data Pipeline, select “File Upload” then “Format Checker” and upload the file to check the file format (this will only check the 1<sup>st</sup> record following header row)

- File Upload
- Format Checker
- Data File Upload
- Validation Report
- Batch Maintenance
- + EDIS
- + Report Card March
- + RITS
- + SDA
- + Special Education
- + Staff Profile

### Format Checker

**Dataset \*** Staff Profile & Assignments ▼

**File Type \*** Staff ▼

**School Year \*** 2018-19 ▼

**File Name \*** Choose File No file chosen

Upload

- Dataset=Staff Profile and Assignment; File Type = either Staff or Staff Assignment; School Year would be current school-year; Browse to locate previously created data files and click ‘Upload’:

Data Element Name	Excel Column	Data Element Length	Original Length From File	Result
Admin Unit Code	A2	5	5	Pass
District Code	B2	4	4	Pass
Ssn Staff	C2	9	9	Pass
Edid	D2	8	8	Pass
First Name Staff	E2	30	5	Pass
Last Name Staff	F2	30	7	Pass
Gender Staff	G2	2	2	Pass
Birth Date Staff	H2	8	8	Pass
Ethnicity Staff	I2	1	1	Pass
Race Indian Staff	J2	1	1	Pass
Race Asian Staff	K2	1	1	Pass
Race Black Staff	L2	1	1	Pass
Race White Staff	M2	1	1	Pass

- Right-hand column displays ‘Pass’ for fields formatted correctly and ‘Fail’ for fields formatted incorrectly.
- If all fields display ‘Pass’ then proceed to upload the data file
- If any field displays ‘Fail’ then review the file, make revisions to the applicable field(s) and re-upload the file into Format Checker until all fields display ‘Pass’.

## Staff Interchange Process

- Upload your Staff Profile file by selecting “File Upload” then “Data File Upload”

- File Upload
  - Format Checker
  - Data File Upload**
  - Validation Report
  - Batch Maintenance
- + EDIS
- + Report Card March
- + RITS
- + SDA
- + Special Education
- + Staff Profile
- + Student Profile
- + Teacher Student Data link
- + Dataset Administration
- + Pipeline Reports

### Data File Upload

**Exception File**

**Dataset \*** Staff Profile & Assignments ▼

**File Type \*** Staff ▼

**School Year \*** Select... ▼

**Organization/LEA \*** Select... ▼

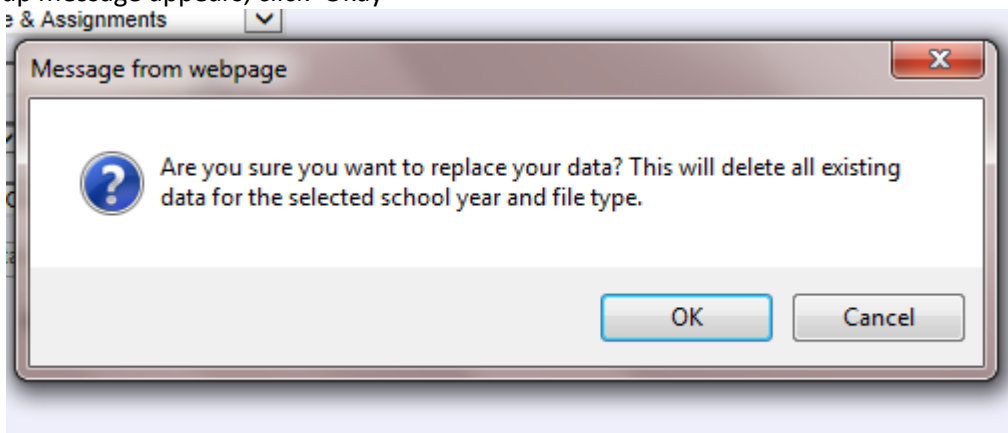
**Locate File \*** Choose File No file chosen

**Upload Type \***  Append  Replace

Submit

- o Dataset = “Staff Profile & Assignments”; File Type = “Staff”; School Year = (reporting year); click “Browse” to locate the previously created file. Choose ‘Replace’ and then ‘Submit’.

- If a pop-up message appears, click ‘Okay’



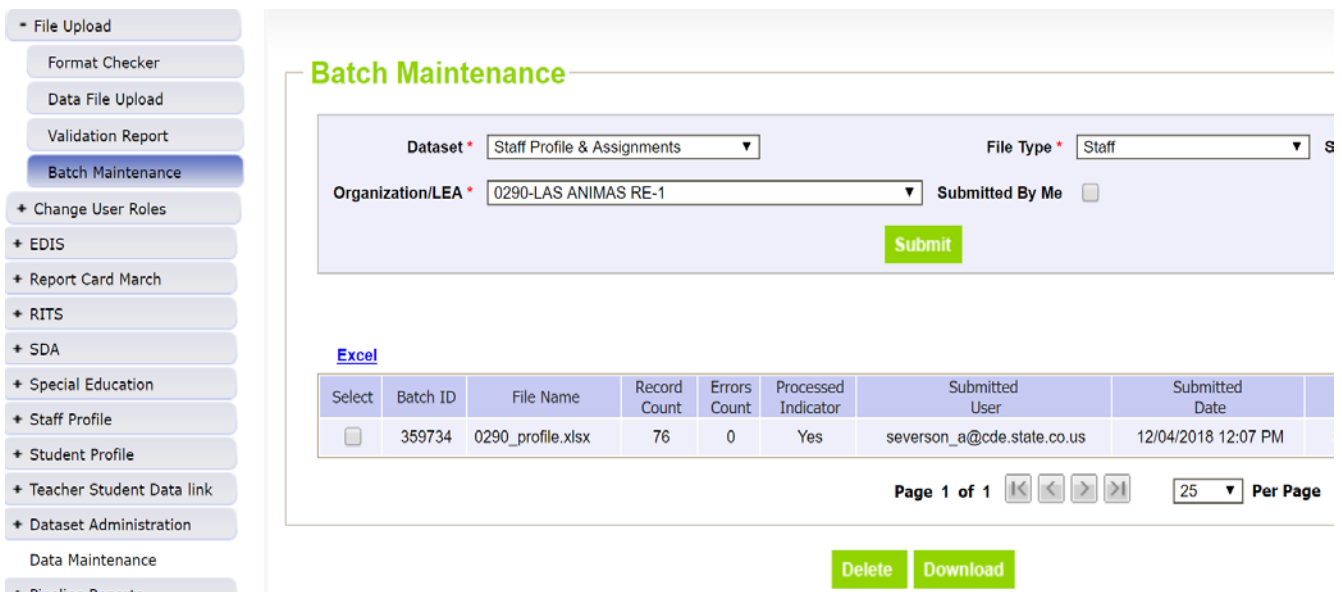
- Message will display:

### Data File Upload

The File Upload request has been successfully submitted. Batch ID for the submitted request is 43938. An email will be sent after the processing is complete.

## Staff Interchange Process

- To determine if file process has been completed and number of errors, there are two options:
  - First, you will receive an email indicating it completed and noting number of records processed and number with errors [Click here for sample email of Staff Profile file completing](#)
  - Second, you may review the Batch Maintenance screen under the File Upload tab.
    - In the Batch Maintenance Screen, select the Dataset = 'Staff Profile and Assignments'; File Type = Staff; School Year = (*current year*) and click 'Submit'
    - Additional information will appear which will include [Batch ID]; [File Name], [Record Count], [Error Count], [Processed Indicator], [Submitted User], [Submitted Date] and [LEA]
    - [Processed Indicator] on that screen will have "Yes" if completed and "No" if not completed
    - [Record Count] will display the number of records processed (*verify displayed number is the same as the number of records uploaded in the file*)
    - [Error Count] will display the number of errors in the file. These errors will need to be resolved prior to creating any data snapshots.



**Batch Maintenance**

Dataset \*  File Type \*

Organization/LEA \*  Submitted By Me

[Excel](#)

Select	Batch ID	File Name	Record Count	Errors Count	Processed Indicator	Submitted User	Submitted Date
<input type="checkbox"/>	359734	0290_profile.xlsx	76	0	Yes	severson_a@cde.state.co.us	12/04/2018 12:07 PM

Page 1 of 1      Per Page

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](#)"
- 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

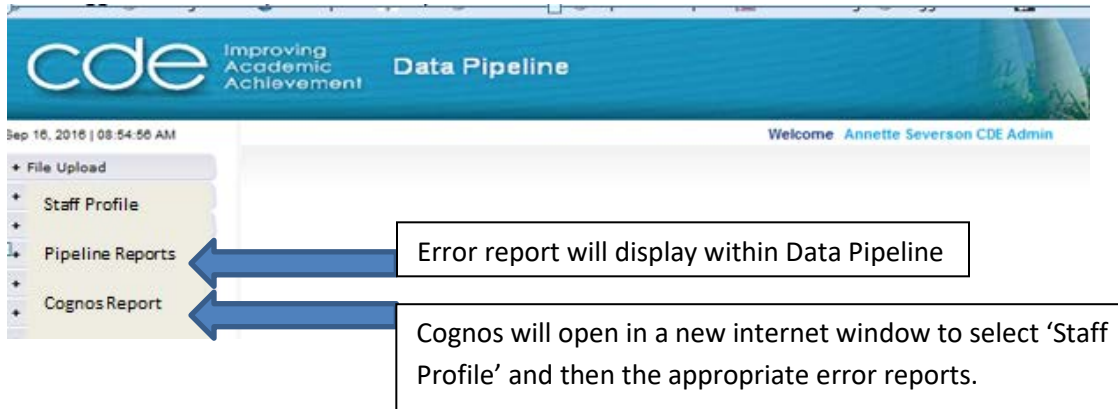
- To determine if file process has been completed and the number of errors; follow the same steps outlined for the Staff Profile above. ([Click here for sample email of Staff Assignment file completing](#))



## Staff Interchange Process

### Review Error Reports

- Review summary errors (if desired):
  - Data Pipeline -> Pipeline Reports -> Error Reports
  - Cognos Report -> Staff Profile ->
    - Staff Profile Error Summary Report
    - Staff Assignment Error Summary Report



The screenshot shows the CDE Data Pipeline interface. The navigation menu on the left includes: File Upload, Staff Profile, Pipeline Reports, and Cognos Report. Two blue arrows point from callout boxes to the 'Pipeline Reports' and 'Cognos Report' items.

**Callout 1:** Error report will display within Data Pipeline (points to Pipeline Reports)

**Callout 2:** Cognos will open in a new internet window to select 'Staff Profile' and then the appropriate error reports. (points to Cognos Report)

- Pipeline Reports:
  - Select Dataset = Staff Profile & Assignments; File Type = 'Staff' or 'Staff Assignment'; school year, Organization/LEA will be pre-populated based on log in information and Error Type = 'Errors and Warnings', "Errors" or "Warnings"
    - Errors and Warnings will display both errors and warnings found in the file
    - Errors will display only the errors found in the file
    - Warnings will display only the warnings found in the file.

### Error Report

Dataset \*  File Type \*

School Year \*  Organization/LEA \*

Error Type \*

[Select All](#) | [Deselect All](#) [Excel](#)

Select	Error Code	Error Type	Error Message	Count
<input checked="" type="checkbox"/>	ST006	E	EDID is invalid. It cannot be blank or zero-filled, it must be numeric and 8 digits, and it must be in the EDIS system.	20
<input checked="" type="checkbox"/>	ST208	E	Subject Area of Degree cannot be blank.	256
<input checked="" type="checkbox"/>	ST314	W	If highest level of education is reported with codes 16, 17, 18, 19 or 20 then the subject area of degree 1 must be reported with a valid code and not 0000 or 2100 (no degree).	2

## Staff Interchange Process

- Review individual records with errors or warnings using Data Pipeline Error Report:
  - o Data Pipeline -> Pipeline Reports -> Error Reports -> Select 'View Details'

**Error Report**

Dataset \*  File Type \*   
 School Year \*  Organization/LEA \*   
 Error Type \*

[Select All](#) | [Deselect All](#) [Excel](#)

Select	Error Code	Error Type	Error Message	Count
<input checked="" type="checkbox"/>	ST006	E	EDID is invalid. It cannot be blank or zero-filled, it must be numeric and 8 digits, and it must be in the EDIS system.	20
<input checked="" type="checkbox"/>	ST208	E	Subject Area of Degree cannot be blank.	256
<input checked="" type="checkbox"/>	ST314	W	If highest level of education is reported with codes 16, 17, 18, 19 or 20 then the subject area of degree 1 must be reported with a valid code and not 0000 or 2100 (no degree).	2

- o Easiest to download the errors in excel:

**Error Report**

Dataset \*  File Type \*   
 School Year \*  Organization/LEA \*   
 Error Type \*

[Select All](#) | [Deselect All](#) [Excel](#)

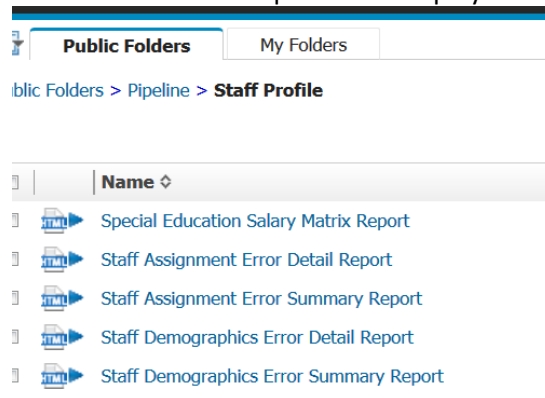
Select	Error Code	Error Type	Error Message	Count
<input checked="" type="checkbox"/>	ST006	E	EDID is invalid. It cannot be blank or zero-filled, it must be numeric and 8 digits, and it must be in the EDIS system.	20
<input checked="" type="checkbox"/>	ST208	E	Subject Area of Degree cannot be blank.	256
<input checked="" type="checkbox"/>	ST314	W	If highest level of education is reported with codes 16, 17, 18, 19 or 20 then the subject area of degree 1 must be reported with a valid code and not 0000 or 2100 (no degree).	2

## Staff Interchange Process

### Cognos Error Summary Reports:



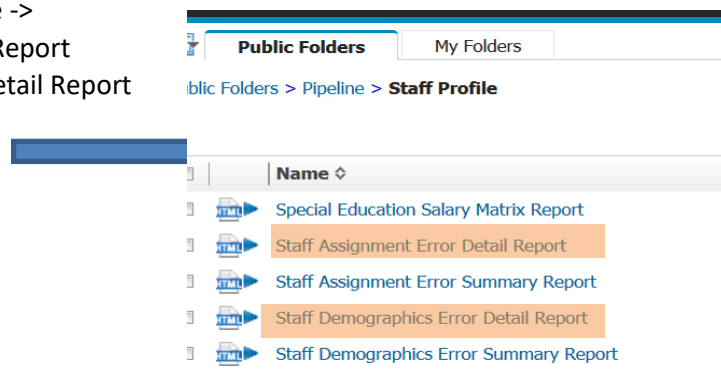
- Select "Staff Profile"
  - Note: Ignore 'Modified Date'; it is not updated each time the interchange files are uploaded
- Select the file error report to be displayed:



- Assignment Error Summary Report
- Demographics Error Summary report

### Review individual records with errors or warnings using Cognos Report:

- Cognos Report -> Staff Profile ->
  - Staff Profile Error Detail Report
  - Staff Assignment Error Detail Report

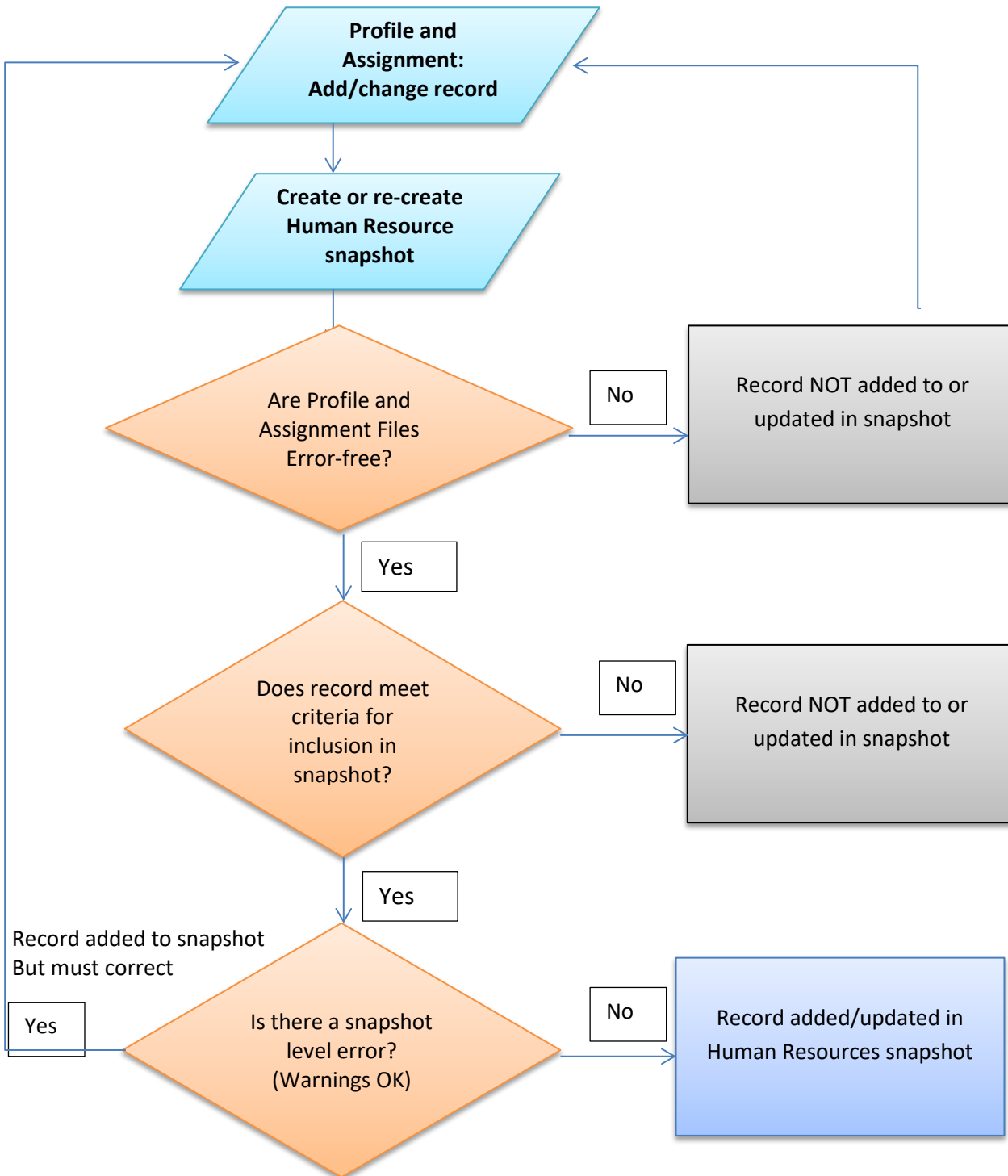


### Correct Staff Profile and Staff Assignment errors. Some methods:

- 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

## Staff Interchange Process

Flowchart of process:





## Staff Interchange Process

### 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

### 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.



## Staff Interchange Process

### 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 Interchange Process

### 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>



## Staff Interchange Process

### File Error Example Email:

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

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

Sent: Wednesday, October 15, 2016 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 District code of Residence: 000000 (4 max length), Please correct your errors and upload the file again.  
-----