

DataSpecs® v6.0

User's Guide

April 15, 2014



ESP Solutions Group

Table of Contents

Table of Contents	i
Introduction to DataSpecs	1
DataSpecs Overview	1
DataSpecs Terms and Relationships	1
Entry Effective Date and Expiration Date	3
Login and User Roles	4
User Set Up (Create Login ID and Password)	4
Definitions of User Roles	4
More Information	5
Getting Started	6
Login	6
Home Screen	8
DataSpecs Screens	9
Exit or Logout	10
About Collections	10
About Repositories	11
About Outputs/Reports	11
Collections	13
Collections Functionality	13
Collections→Collection Info	14
Collection Info Screen Layout & Description	15
Screen Functionality & Navigation – Collection Info	18
Collections→Collection Item	23
Collections Info Screen Layout & Description	23
Screen Functionality & Navigation – Collection Item	27
Collections→Collection Items→Map To Repository	31
Screen Layout & Description	31
Screen Functionality & Navigation – Collection Item – Map to Repository	32
Collections→Collection Items→Map To SIF	35
Screen Layout & Description	35
Screen Functionality & Navigation – Collection Item – Map to SIF	36
Collections→Collection Cycle	38
Screen Layout & Description	38
Screen Functionality & Navigation – Collection – Collection Cycle	40
Collections→Collection Level Rules	43
Collection Level Rules Screen Layout & Description	44
Screen Functionality & Navigation – Collection Level Rules	46
Collections→Associated Links	50
Collections → Associated Links Screen Layout & Description	50
Screen Functionality & Navigation – Associated Links	51
Repositories	54
Repositories Functionality	54
Repositories→Repository Info	54
Repository Info Screen Layout & Description	54
Screen Functionality & Navigation – Repositories Info	56
Repositories→Repository Table Info	62
Repository Table Screen Layout & Description	62
Screen Functionality & Navigation – Repository Table Info	63
Repositories→Table Fields	68
Repository Table Fields Screen Layout & Description	68

Screen Functionality & Navigation – Repositories -> Table Field	70
Repositories→Associated Links.....	75
Repositories Associated Links Screen Layout & Description	75
Screen Functionality & Navigation – Associated Links.....	77
Repositories→Map Repository Field to Repository Field	79
Screen Layout & Description	79
Screen Functionality & Navigation – Map Repository Field to Repository Field.....	80
Outputs and Reports	82
Outputs and Reports Functionality	82
Outputs and Reports→Output Info.....	82
Output Info Screen Layout & Description.....	82
Screen Functionality & Navigation – Output Info	86
Outputs and Reports→Output Item.....	93
Output Item Screen Layout & Description.....	93
Screen Functionality & Navigation – Outputs and Reports – Output Item.....	97
Outputs and Reports→Output Item→Map To Repository	102
Output Item Map to Repository Screen Layout & Description	102
Screen Functionality & Navigation – Output Item – Map to Repository.....	103
Outputs→Associated Links	106
Outputs Associated Links Screen Layout & Description.....	106
Screen Functionality & Navigation – Associated Links.....	107
Elements	110
Elements Functionality	110
Elements→Elements Info.....	111
Element Info Screen Layout & Description	111
Screen Functionality & Navigation – Element.....	113
Elements→NCES Handbook	120
NCES Handbook Screen Layout & Description	120
Screen Layout & Description	122
Elements→NCES Handbook→Map to NCES	125
Screen Layout & Description	125
Screen Functionality & Navigation – Element – Map to NCES	126
Elements→Categorize	128
Option Sets.....	130
Option Sets Functionality.....	130
Option Sets→Option Sets	130
Option Set Screen Layout & Description	130
Screen Functionality & Navigation –Option Sets	132
Option Sets→Options.....	138
Options Screen Layout & Description	138
Screen Functionality & Navigation –Options.....	139
Search	143
Support	145
Glossary	145
Offices	146
People	147
Mandate	147
Mandate Type	148
Mandate Level.....	148
CourseWalk™	149
System Administration.....	150
System Tables	150
User Management.....	151

Table of Figures

Figure 1 - Login Screen (Composite Image)	6
Figure 2 - Forgot Password Screen	7
Figure 3 - Email Administrator Screen	7
Figure 4 - "Home" Navigation Screen	8
Figure 5 - Two-tiered Menu Bar	8
Figure 6 - Available Selections from DataSpecs Home Page	9
Figure 7 - Collection Info screen (composite image)	15
Figure 8 - Create Options Pop-up	19
Figure 9 - Expanded Button Bar	21
Figure 10 - Collection Info Deletion Popup	22
Figure 11 - Collection Info Data Grid View	22
Figure 12 - DataSpecs Navigation Bars	22
Figure 13 - Collection Item Screen (composite image)	24
Figure 14 - Collection Item Pop-up Box	28
Figure 15 - Copy Element Pop-up Box	29
Figure 16 - Collection Item - Map to Repository Screen (composite image)	31
Figure 17 - Un-map Pop-up Confirmation	33
Figure 18 - Collection Item - Map to SIF Screen	35
Figure 19 - Collection Cycle Definition	38
Figure 20 - Collection Schedule Inventory Screen	42
Figure 21 - Collection Level Rules Screen (composite image)	44
Figure 22 - Create Options Pop-up	47
Figure 23 - Collection Rule Data Grid View	49
Figure 24 - Collections Associated Links Screen	50
Figure 25 - Collections Associated Links Delete Button Bar	52
Figure 26 - Collection Associated Link Delete Pop-up	53
Figure 27 - Repository Info Screen (composite image)	55
Figure 28 - Repository Create Options Pop-up Window	57
Figure 29 - Repository New from Copy Pop-up Window	58
Figure 30 - Expanded Repository Info Button Bar	60
Figure 31 - Deletion Confirmation Pop-up Window	60
Figure 32 - Repository Data Grid View	60
Figure 33 - Repository Details Report	61
Figure 34 - Repository Table Info (composite image)	62
Figure 35 - Repository Table New Copy Pop-up Window	65
Figure 36 - Expanded Repository Table Info Button Bar	66
Figure 37 - Repository Table Data Grid View	67
Figure 38 - Repository Table Field (composite image)	68
Figure 39 - Repository Field New From Copy Pop-up Window	72
Figure 40 - Repository Fields Delete Button Bar	74
Figure 41 - Repository Fields Delete Pop-up	74
Figure 42 - Repository Fields Data Grid View	75
Figure 43 - Repositories Associated Links Screen	76
Figure 44 - Repositories Associated Links Delete Button Bar	78
Figure 45 - Repositories Associated Link Delete Pop-up	78
Figure 46 - Output Info screen (composite image)	83
Figure 47 - Output Info Create Options Pop-up Window	87
Figure 48 - Output Upload Import Screen	89
Figure 49 - Output Info Upload Success Pop-up Window	90
Figure 50 - Expanded Output Info Button Bar	90
Figure 51 - Deletion Confirmation Pop-up Window	91
Figure 52 - Output Info Data Grid View	91
Figure 53 - Output Item Screen (composite image)	94

Figure 54 - Output Item New from Copy Pop-up Window	98
Figure 55 - Output Item Copy from Element Pop-up Window	99
Figure 56 - Output Item - Map to Repository Screen (composite image)	102
Figure 57 - Output Item Map to Repository Un-map Screen	104
Figure 58 - Output Item Map to Repository Data Grid View	105
Figure 59 - Outputs Associated Links Screen.....	106
Figure 60 - Outputs Associated Links Delete Button Bar	109
Figure 61 - Outputs Associated Link Delete Pop-up.....	109
Figure 62 - Output Associated Links Data Grid View	109
Figure 63 - Element Info Screen (composite image)	111
Figure 64 - Elements Create Options Popup Window	114
Figure 65 - Elements NCES Handbook Screen.....	116
Figure 66 - Element Upload Screen.....	117
Figure 67 - Element Upload Success Screen	118
Figure 68 - Expanded Button Bar	118
Figure 69 - Elements NCES Handbook Screen.....	120
Figure 70 - Element NCES Handbook Screen.....	122
Figure 71 - NCES Handbook Data Grid View	124
Figure 72 - Elements Map to NCES Screen	125
Figure 73 - Element Map to NCES Bottom Button Bar.....	128
Figure 74 - Option Sets screen	131
Figure 75 - Option Set Create Options Pop-up Window.....	133
Figure 76 - Option Set New Name Pop-up Window	134
Figure 77 - Option Set Upload Import Screen.....	135
Figure 78 - Option Set Upload Success Pop-up Window	136
Figure 79 - Expanded Option Set Button Bar	137
Figure 80 - Deletion Confirmation Pop-up Window	137
Figure 81 - Option Set Data Grid View Screen	137
Figure 82 - Options screen.....	138
Figure 83 - Option Set Upload Import Screen.....	140
Figure 84 - Option Upload Success Pop-up Window	141
Figure 85 - Option Screen with Remove Option Button.....	142
Figure 86 - Option Deletion Confirmation Pop-up Window.....	142
Figure 87 - Option Data Grid View Screen	143
Figure 88 - Search Screen	144
Figure 89 - Search Results Screen.....	144
Figure 90 - Search Result Selected Screen.....	145
Figure 91 - Glossary Screen	146
Figure 92 - Offices Screen	146
Figure 93 - People Screen	147
Figure 94 - Mandate Screen	147
Figure 95 - Mandate Type Screen	148
Figure 96 - Mandate Level Screen.....	148
Figure 97 - System Administration Screen	150
Figure 98 - User Management Screen.....	152
Figure 99 - Create New User Screen.....	152

Introduction to DataSpecs

DataSpecs Overview

DataSpecs® is a metadata inventory application that compiles information about data resources and standardizes data definitions, codes, and formats to facilitate sharing of information across all applications without the need to reformat data time and time again.

DataSpecs provides abilities to:

- Complete a comprehensive inventory of existing data resources
- View data items included in the collections and the reports where these data items are published
- Load, modify, and track data elements as they appear in the agency through collections, repositories, and reports
- Establish and maintain a data element dictionary, and document data element definitions, data types, and formats
- Link data items in collections, repositories, and outputs/reports to data dictionary elements

We believe it is useful to make the distinction between data items and data elements. Data items are included in data collections. They may be questions for which an open-ended answer is desired or they may require a choice from a set of codes or options. Name is an open-ended data item; sex is usually a coded choice. Data elements are the core bits of data as they exist in your data system. Data items may be combined to create data elements. The same data element may be collected in different ways – or using different data items.

Data elements (the core data dictionary elements for your agency) and collection items which are loaded in DataSpecs may be linked to national standards, such as the Common Education Data Standards (CEDS), the National Center for Education Statistics (NCES) Handbooks, the U.S. Department of Education ED*Facts*/EDEN reports, and the Schools Interoperability Framework (SIF) specifications.

You begin by creating a data dictionary called Elements in DataSpecs. To link to CEDS elements you will load collection items, repository fields, and output items into DataSpecs and link each item/field to the corresponding element in the DataSpecs dictionary. To link to U.S. Department of Education ED*Facts*/EDEN data, flag the element entry as "EDEN-related" in the data dictionary. To link to SIF specification object/elements, you will load collection items into DataSpecs and link each item to the appropriate SIF specification object/element.

DataSpecs' CourseWalk functionality supports the linking of state and local courses to the NCES course classification system called "School Codes for the Exchange of Data" or SCED.

Developing and maintaining these links to national standards helps to support student record exchange at both local and state levels.

DataSpecs Terms and Relationships

The normal process of data management for an organization is to:

1. Collect data
2. Store the data in a repository
3. Process the data, possibly moving it into other repositories



4. Generate various outputs and reports from the repositories

A data collection consists of a set of data items that are grouped together and “collected” from various sources. For state education agency operation, the collections would be primarily from school districts and/or schools. In many organizations, the data items appear on a form (or several forms) or in electronic format(s). The individual fields or components of the collection are called “items.”

Data are typically stored in a database of some kind – the most common being a relational database system. Oracle, SQL Server, Access, FoxPro, and SAS are common examples of such systems. These data repositories are structured as data tables that consist of strictly defined fields or columns.

Reports and other system outputs are often structured similarly to the collections. In fact a report from one organization (e.g., a school district) may be a collection for another (e.g., a state education agency). Thus, a report or output can be decomposed to a set of items.

The detailed data reside in and move across collection items, table fields, and output/report items. For consistency, these items and fields should be uniformly defined, formatted, and applied.

DataSpecs documentation can be approached using different strategies. For example, you could focus on student data collections, repositories and reports/outputs, or focus on collections, repositories and outputs/reports required to meet certain reporting requirements. The DataSpecs tool set is flexible.

One strategy for using DataSpecs functionality is to use the following steps:

1. Load information on **Offices** and **People** (the organization offices and people with data management roles – usually data stewards - within the agency). Offices and People are referenced in **Collections**, **Repositories**, and **Outputs/Reports**.
2. Load initial **Elements** (create the initial Data Dictionary).
3. Load initial **Option Sets** and **Options** (code sets) as required for Data Dictionary Elements.
4. Relate Data Dictionary Elements to Option Sets.
5. Load **Collections** and **Collection Items**.
6. Relate Collection Items to available Data Dictionary Elements, adding Element entries as needed.
7. Relate Collection Items to available Option Sets, adding Option Sets and Options as needed. (Note that specific option sets may be referenced directly by a Collection Data Item.)
8. Load **Repositories**, **Tables**, and **Repository Fields**.
9. Relate Repository Fields to available Data Dictionary Elements, and add Element entries as needed.
10. Relate Repository Fields to available Option Sets, adding Option Sets and Options as needed.
11. Load selected **Outputs/Reports** and **Output/Report Items**.
12. Relate Output/Report Items to available Data Dictionary Elements, and add Element entries as needed.
13. Relate Output/Report Items to available Option Sets, adding Option Sets and Options as needed.
14. Document Collection Cycles.
15. Load Validation Rules.
16. Relate (Map) Collection Items to Repository Fields.
17. Relate (Map) Collection Items to SIF specification objects and elements.
18. Relate (Map) Output/Report Items to Repository Fields.
19. Enter information on the Associated Links to Internet resources on documentation, rules, submission sites, etc. for Collections, Repositories, and Outputs/Reports.

Throughout the above steps, the project would support review of definitions and option sets referenced by data items and fields against the standard definitions and option sets provided through NCES Data Handbooks to verify that important distinctions are included in the definition, and to examine the agency's current option sets against similar option sets included in the agency data dictionary, against NCES Data



Handbooks data element option sets, and against option sets used within SIF specifications. Both NCES Data Handbooks and SIF specifications are available within DataSpecs.

DataSpecs implementation supports users to access, review, and to improve the clarity of communication with the community users of education data.

Entry Effective Date and Expiration Date

Many DataSpecs entries include an “effective date,” an “expiration date,” and some entries include a version number. These constructs are useful to support documenting data management over time, as is required for a longitudinal data system. Thus, when an entry is modified, the older entry should be assigned an expiration date, and the new entry would be assigned an effective date reflecting the actual (or scheduled) implementation date.

An entry is identified as “active” as long as its “Expiration Date” has not passed. Once the “Expiration Date” is reached, the entry is identified as “inactive”. “Filters” on many screens support the option to view only the “active” entries.

These entry date stamps are important when DataSpecs is being used to plan, prepare and deploy new collections, repositories, and outputs/reports, or for modifications to collections, repositories, and outputs/reports.

Login and User Roles

DataSpecs users require a valid website login and an assigned security role for access to and/or for modification of data within the DataSpecs application.

User Set Up (Create Login ID and Password)

For initial product setup, the customer provides ESP with names and email addresses of the persons for whom login accounts are to be created. Login accounts, security, and application role information will be set up and these users will use the logins created to manage the product.

Definitions of User Roles

After the System Administrator for the network environment creates a user login for access to the site, the Administrator for the DataSpecs site would use the "System Administration > User Management" screen to establish the users account. Each user is defined with a Security Role (Required) and can be given an Application Role (Optional). The Security Role enables access to various capabilities within the DataSpecs application while the Application Role can be given to a user (but is not required) in order to categorize what type of user they are.

Security Roles

Security Role	Security Role Description
Unauthenticated	The "Unauthenticated" security role allows users to view DataSpecs content but not access the System Administration functions.
Authenticated	The "Authenticated" security role allows access to create, read, update, and delete DataSpecs content but does not provide access to System Administration functions.
Administrator	The "Administrator" role provides access to manage users and their roles, to manage the system option tables, and to perform all of the functions allowed for "Authenticated" users.
ESP Administrator	The "ESP Administrator" security role allows the user access to all DataSpecs areas.

Application Roles

Application Role	Application Role Description
ESP Staff	The "ESP Staff" application role enables ESP staff to set up initial roles and complete the initial DataSpecs set up for the installation.
State Data Staff Administrator	The "State Data Staff Administrator" role is the administrator(s) of DataSpecs at the state level.
State Content Area Specialist	This role identifies the user as a Content Area specialist at the state level.
LEA Data Staff	This role identifies the user as a Data Manager at the local education agency (LEA or school district) level.
LEA Content Area Specialist	This role identifies the user as a Content Area specialist at the local education agency level.
None	This role is to identify a user that does not belong to any other role.

More Information

ESP will notify all clients of any changes that occur to the Security and Application Role options. Users should email the DataSpecs administrator from the DataSpecs login screen for more information or changes to these roles.

April 2014

Getting Started

Login

To login to DataSpecs, enter the URL for the host site. The DataSpecs Login Screen is the entry point to the application.

From this screen, you may login to the application as an authorized user, or access predefined public reports from the host site without logging in. The reports are available in the “Other Reports” scroll list.



Figure 1 - Login Screen (Composite Image)

April 2014

Enter the assigned User ID and password and select the "Login" button, and the DataSpecs Home screen is returned for a successful login.

If the user needs additional assistance, links are available for "Forgot Password?" and to "Email Administrator" just below the User ID and Password.

The screenshot shows a web form titled "Forgot Password" in a blue header bar. Below the title, a text box contains the instruction: "If you forgot your password, simply fill in your User ID below and your password will be e-mailed to you." Underneath this text is a text input field labeled "User ID :". At the bottom of the form, there are two buttons: "Send" and "Cancel", both with blue circular icons on the left. To the right of these buttons is a text link that says "Forgot User ID?".

Figure 2 - Forgot Password Screen

The "Forgot Password?" screen is available to request the password for the User ID. The password is sent to the user's email address.

To request the User ID, a link to "Forgot User ID?" is available from the "Forgot Password?" screen. The user enters the email address which is associated with the DataSpecs account, and the User ID is returned to the user via email.

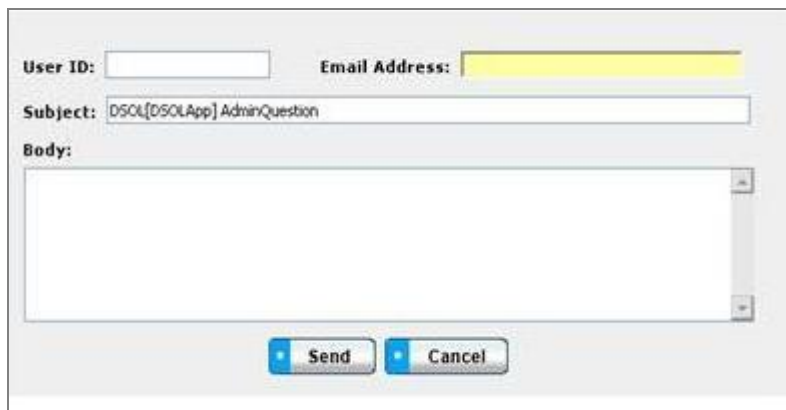
The screenshot shows a web form titled "Email Administrator". It contains several input fields: "User ID:" with a text box, "Email Address:" with a text box that has a yellow background, "Subject:" with a text box containing the text "DSOL[DSOLApp] AdminQuestion", and "Body:" with a large text area. At the bottom of the form, there are two buttons: "Send" and "Cancel", both with blue circular icons on the left.

Figure 3 - Email Administrator Screen

You may contact the person who acts as the DataSpecs administrator from the Login Screen by selecting the "Email Administrator" hyperlink. You provide your User ID and Email Address, type the message in the body area, and select the "Send" button to transmit the message. The "Cancel" button closes this message box.

Home Screen

The Home Navigation Screen is presented after a successful Login to DataSpecs.

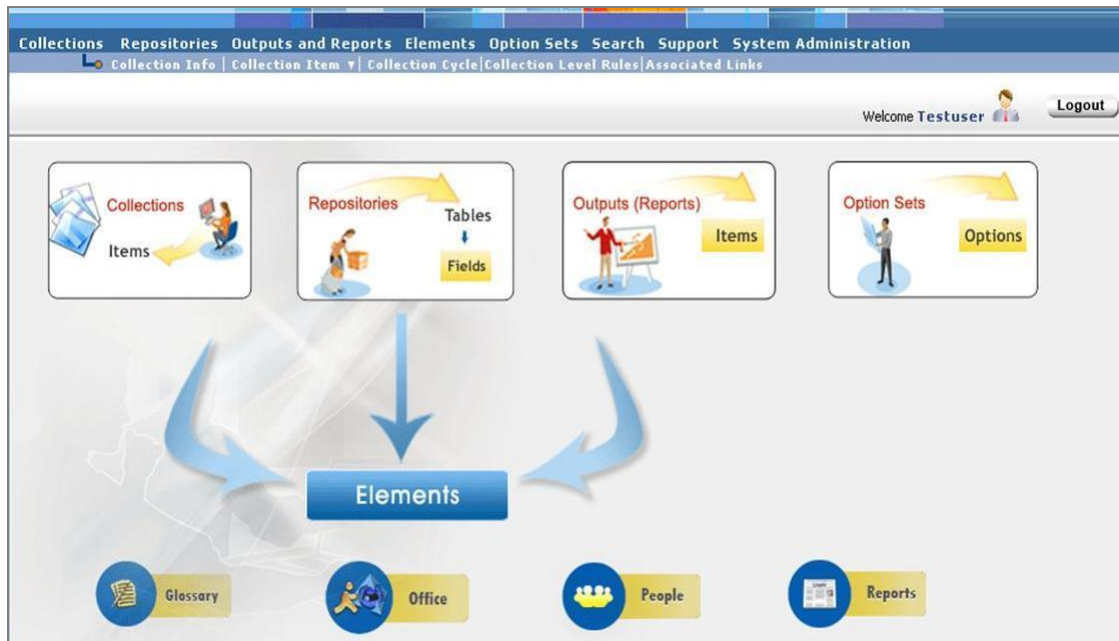


Figure 4 - "Home" Navigation Screen

The DataSpecs "Home" navigation screen (above) includes a two-tiered menu bar in the upper section of the screen.



Figure 5 - Two-tiered Menu Bar

The first menu bar provides links to each of the DataSpecs components (Collections, Repositories, Outputs and Reports, Elements, and Option Sets), to the Search function, and to System Administration tools. The second bar of the menu provides links to functions within the above components. Selections in the second bar change with the selection from the upper bar.

When you select "Collections," the second bar references the functional metadata components for Collections, including Collection Info, Collection Item, Collection Cycle, etc., as shown above.

When you select "Repositories" the second bar display presents the components for Repositories.

Below the menu bar, a graphic depiction of DataSpecs components represents operating relationships across DataSpecs metadata sets.



Figure 6 - Available Selections from DataSpecs Home Page

The DataSpecs home page is a graphic illustration of the relationships included within the DataSpecs database and functionality.

In the above image “Collections” include “Items.” “Items” are linked to “Elements” in the Data Dictionary.

The text terms within the diagram are hyperlinks which can also be used to access the associated data screens. The available selections are identified by arrows in the above diagram

DataSpecs Screens

The menu bar sections of DataSpecs include the following screens and functionality:

Collections

[Collection Info](#) | [Collection Item](#) ▼ | [Collection Cycle](#) | [Collection Rules](#) | [Associated Links](#)
[Map to Repository](#)
[Map to SIF](#)

Repositories

[Repository Info](#) | [Table Info](#) | [Table Fields](#) | [Associated Links](#) | [Map Repository Field to Repository Field](#)

Outputs and Reports

[Output Info](#) | [Output Item](#) ▼ | [Associated Links](#)
[Map to Repository](#)

Elements

[Element Info](#) | [NCES Handbook](#) ▼ | [Categorize](#) | [NCES Option Sets](#) | [NCES Options](#) | [NCES Cat. Map to NCES](#)

Option Sets

[Option Sets](#) | [Options](#)

Search

[Search Function](#)

Support

[Glossary](#) | [Offices](#) | [People](#) | [Mandate](#) | [Mandate Type](#) | [Mandate Level](#)

System Administration

[System Tables](#) | [User Management](#)

Exit or Logout

To exit a DataSpecs session, select the “Logout” button at the upper right, just below the menu bars.

About Collections

A Data Collection consists of a set of data items that are grouped together and “collected” from one or more sources. For state education agency operation, collections are usually data brought in from districts and schools. For district operation, collections usually include data brought in from schools and other operational entities in the district, including transportation and school food service. In many organizations, the data items appear on a form (or several forms) or in electronic format(s). The individual fields or components of the collection are called “items.”

Summary information on each documented Collection includes:

- collection name and number
- status (active, inactive, under review, etc.)
- available collection documentation
- effective date (date when the collection was or will be implemented)
- expiration date
- collection version
- collection description (abstract)
- mandate (purpose or reason for the collection)
- owner information (responsible office, steward, or contact)
- collection type or purpose
- level of detail
- collection method
- privacy restrictions
- target audience
- periodicity (frequency of collection)
- month(s) collected

(Definitions of the terms are included in the “Collections” section of the User's Guide.)

Collection name, effective date, and version fields are “required” fields, and the remaining information about a collection is optional.

About Repositories

Once data have been received in a collection, these data are typically stored in one or more databases – the most common database structure is a relational database. The storage locations are called Repositories. These data repositories are structured as data tables that consist of strictly defined fields or columns.

The summary information on each Repository may include:

- repository name
- status (active, being revised, consolidated, inactive, etc.)
- repository type (staging, development, operational, data warehouse, etc.)
- repository description
- file server name
- IP address
- database/instance name
- database software name and software version
- contacts
- responsible office
- effective date
- expiration date
- version

(Definitions of the terms are included in the “Repositories” section of the User's Guide.)

Repository name, effective date, and version fields are “required” fields, and the remaining information about a repository is optional.

About Outputs/Reports

Outputs and Reports are the methods of presenting data using the contents of repositories. The reports or outputs created (or being designed) are documented as Outputs and Reports.

The summary information on each Repository may include:

- output or report name
- report set
- report number
- status (active, being revised, consolidated, inactive, etc.)
- target audience
- responsible office
- steward(s)
- output or report abstract (description)
- mandate
- report characteristics (media, format, detail level)
- privacy restriction
- periodicity (months reported)
- effective date
- expiration date

April 2014

- version

(Definitions of the terms are included in the “Outputs and Reports” section of the User's Guide.)

For Outputs and Reports, the name, effective date, and version fields are “required” fields, and the remaining information is optional.

Collections

Collections Functionality

Collections functionality addresses the following Data Inventory steps:

1. Load Collections and Collection Items.
2. Relate Collection Items to available Data Dictionary Elements, adding Element entries as desired for Collection Items.
3. Relate Collection Items to available Option Sets, adding Option Sets and Options as needed for Collection Items. (Note that specific option sets may be referenced directly by a Collection Data Item.)

Collections functions also address Data Inventory steps:

1. Document Collection Cycles
2. Load Validation Rules
3. Relate (Map) Collection Items to Repository Fields
4. Relate (Map) Collection Items to SIF specification objects and elements
5. Enter information on the Associated Links to Internet resources on documentation, rules, submission sites, etc. for Collections, Repositories, and Outputs/Reports

The second-tier menu bar at the top of the DataSpecs screen lists the following action areas:

- Collections Info
- Collection Item
- Map to Repository
- Map to SIF
- Collection Cycle
- Collection Level Rules
- Associated Links

The above areas support entry, upload, download, and reporting of the data inventory around collections.

Collections→Collection Info

Collection Info is documentation about the high-level collection's information. The screen provides functionalities to:

- Add a single collection entry
- Upload collection info for one or more collections
- Update or edit a collection
- Remove a collection
- View a specific collection entry
- View a set of collection entries
- Generate a Collection Details Report

Collection Info Screen Layout & Description

When you select "Collection Info" from the upper menu bar, the following screen is returned.

ESP Solutions Group

STATE OF TRANQUILITY

ESP Solutions Group DataSpecs™

Collections Repositories Outputs and Reports Elements Option Sets Search Support CourseWalk™ System Administration

Collection Info | Collection Item | Collection Cycle | Collection Level Rules | Associated Links

Home > Collections > Collections

Welcome Testuser Logout

Basic Information

☒ Active Only

Collection Name*
---Select--- New

Record Type*
Teacher
Course
Student
School

Collection Number
Collection Set
---Select--- New

Status
---Select---

Abstract
Mandate

Ownership

Collection Steward
Responsible Office
---Select---

Phone
Extension
Email

Collection Characteristics

Collection Type
---Select---

Detail Level
---Select---

Collection Method
---Select---

Required
---Select---

Privacy Restriction
---Select---

Target Audience
---Select---

Collection Cycle

Periodicity
Month Collected
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Available Documentation

☐ Administration Manual ☐ Change Implications ☐ Item List
☐ Storage Location ☐ Item Dictionary ☐ Other Documentation ☐ Quality Criteria

History Tracking

Effective Date*
Expiration Date
Version*
1

Data Grid View Add Collection Collection Details Report Save Cancel

Figure 7 - Collection Info screen (composite image)

The groupings of data on the Collections Info screen include: Basic Information, Ownership, Collection Characteristics (including Collection Cycle), Available Documentation, and History Tracking. The fields within these components are defined in the tables that follow, and each field is identified as either Required or Optional.

Component Metadata – Collections – Basic Information		
Field	Definition	Optional(O)/ Required(R)
Active Only	A check indicates that the data presented on the screen is filtered to show only current entries. Expired entries (entries where the “expiration date” has passed) remain in the database, but are not displayed within the drop-down list or the Data Grid view).	
Collection Name	A unique name or title that represents a defined collection.	R
Collection Number	A unique number assigned to represent a specific collection. The unique number is associated with the unique name for a collection.	O
Collection Set	A user-defined grouping of collections.	O
Status	The status of the collection: Active, Being Revised, Consolidated, Inactive, Retired, or Under Review.	O
Abstract	A short description of the collection.	O
Mandate	A description of the source of requirements for the collection. “Mandates” might include a legislative act, a section of law, administrative code or procedure, or local policy.	O

Component Metadata – Collections – Ownership		
Field	Definition	Optional(O)/ Required(R)
Steward or Contact	The person responsible for the collection, repository, etc.	O
Responsible Office	The office responsible for the particular grouping of data (i.e., collection, repository).	O
Phone	The phone number associated with the contact or steward for the office. This field is not editable from Collections screens. The phone reflects the information for the selected contact. Use the “Support ->People” screen to enter or to correct the phone number.	O
Extension	The extension (if any) with the “Phone” field. This field is not editable from the Collections screens. The extension reflects the information for the contact or steward. Use the “Support ->People” screen to enter or to correct the phone number.	O
Email	The email address associated with the steward or contact for the office. This field is not editable from the Collections screens. The email reflects the information for the selected contact. Use the “Support ->People” screen to enter or to correct the phone number.	O

Component Metadata – Collections – Collection Characteristics		
Field	Definition	Optional(O)/Required(R)
Collection Type	The purpose or function satisfied or supported by the collection. The options are: <ul style="list-style-type: none"> • Competitive Grant Application • Entitlement Grant Application • Program Report • Program Monitoring • General Statistics The choices for this list can be edited in the “System Options” table.	O
Detail Level	The lowest level of detail at which the data are collected. Examples include: County, Course, District, Individual, Other, Program, Region, School, or State. The choices for this list can be edited in the System Options table.	O
Collection Method	The method for submitting data for a collection. Options include: Email, Paper Submission, SIF, Web Form, and Web Upload. The choices for this list can be edited in the “System Options” table.	O
Required	The requirement for participation in the collection. Options include: Required, Optional, and Conditional. (Example: A grant program collection may be required only from the schools or districts that have been awarded a particular grant.)	O
Privacy Restriction	Indicates whether individual forms should be protected for reasons of privacy protection. Options include: <ul style="list-style-type: none"> • Cell size dependent • No restriction; or • Cell size dependent. The choices for this list can be edited in the “System Options” table.	O
Target Audience	The group of persons who are the expected primary users of the data or data grouping (Collection, Repository, etc.).	O

Component Metadata – Collections – Collection Cycle		
Field	Definition	Optional(O)/Required(R)
Periodicity	Describes the frequency of recurrence of the collection.	O
Month Collected	The month or months when the collection is expected to be completed.	O

Component Metadata – Collections - Available Documentation		
Field	Definition	Optional(O)/Required(R)
Administration Manual	Check box that documentation is available in an Administration Manual.	O
Change Implications	Check box that documentation is available in a Change document.	O

Item List	Check box that documentation is available in an Item List.	O
Storage Location	Check box that documentation is available in a storage location, e.g., at a web site URL or in a directory.	O
Item Dictionary	Check box that documentation is available in a data dictionary.	O
Other Documentation	Check box that documentation is available in some other format or location.	O
Quality Criteria	Check box that documentation is available in quality criteria, e.g. validation rules set.	O

Component Metadata – Collections – History Tracking		
Field	Definition	Optional(O)/Required(R)
Effective Date	The beginning date that the collection with the specific attributes on this form was (or will be) effective.	R
Expiration Date	The date that the collection with the specific attributes on the form was (or will be) expired.	O
Version	An identifier of a grouping of data (i.e. collection, repository, "outputs and reports") for a set of characteristics used to indicate that a change in the information has occurred from one instance to another. This user-defined text field can be helpful with control of various copies.	R

Screen Functionality & Navigation – Collection Info

The Collection form provides the following actions:

- Select "Active Only" filter to View All Collections or to View Only Active Collections
- Add a Collection
- Edit a Collection
- Remove a Collection
- View the Collection Data Grid
- Generate a Collection Details Report

Note: All required fields must have data assigned for the "Save" to occur. The required fields are denoted with an asterisk beside the field name.

"Active Only" Filter to View All Collections or to View Only Active Collections

The "Active Only" check box controls whether all collections or only the active collections are listed in the Collection Name drop-down box. The default is to view active collections only.

A collection is active as long as its "Expiration Date" has not passed. Once the "Expiration Date" is reached, a collection is marked "Inactive".

Entering and Editing Collection Data

When entering collection data, various fields may be edited by the following methods:

- Enter data directly into an editable field.

- Select a predefined choice from the drop-down list.
- Click on the checkbox or radio button.
- Click on the Calendar icon to specify a date for a date field or type the date.

The fields "Collection Steward" and "Responsible Office" may either be selected from the list of "People" or "Offices" or they may be new entries that are added to the "People" or "Offices" lists. Information in both fields may be managed directly using "SUPPORT -> Offices" or "SUPPORT -> People."

Add a Collection

Once a collection has been selected, it is "remembered." If you go to another area (repository, output, etc.), you can come back to the collection info and the remembered collection appears. To change the collection, you select the new collection from the drop-down list displayed in the Collection Name field.

To add a Collection, select "New" (displayed next to the Collection Name box) or use the "Add Collection" button at the bottom of the screen. To create/add a new repository you can:

- Use the "New" link next to the "Repository Name" box, or
- Use the "Add Repository" button at the bottom of the screen.

Each will refresh the repository screen to allow for data entry to create a new repository.

Using the "New" link will set up the form in the "Add New" creation mode.

When you click on the "Add Collection" button, DataSpecs will present the "Create Options" screen. This screen provides options to enter or load one or more new repository entries. These "Create Options" are:

- Add New
- New from Copy
- New Version
- Import

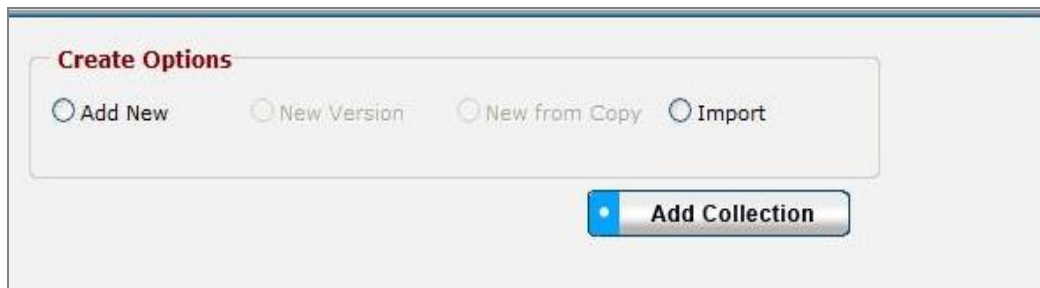


Figure 8 - Create Options Pop-up

Within the "Create Option" menu, the selections "Add New," "New from Copy," and "New Version" each support creation of a single collection entry. The "Import" selection supports loading of one or more collection info entries.

- **Add New**
 1. Select the "New" link or select the "Add Collection" button, then "Add New" within the "Create Option" window.
 2. The screen refreshes for data entry of collection information.
 3. Information must be entered for required fields. Required fields are indicated by an asterisk next to the field name.

4. When collection information has been entered, click the “Save” button at the bottom.
5. Data will be saved and the screen refreshed, showing the collection just entered.

- **New Version**

(The radio button is activated when a collection is chosen)

Note: This option would typically be used when collection information for an entry has a minor change, like the collection dates are changed. The unique effective and expiration dates make the two collections different entries.

1. To create a new collection version from a collection entry, first select the existing collection (the collection entry for which you want to create a new version) from the “Collection Name” drop-down list.
2. Select the “Add Collection” button and specify “New Version” from the “Create Options” pop-up window.
3. The collection screen will refresh to provide data entry for the repository specified (the “Version” field will be incremented—this can also be seen in the Collection Name field; the name will be followed by the version number, for example “Fall School Directory Collection-v1”).
4. Information can be altered but must be entered for required fields. Required fields are indicated by an asterisk next to the field name.
5. Once data entry has been completed, click on the “Save” button at the bottom of the screen.
6. The data will be saved and the screen refreshed, showing the new collection version entry.

Versioning allows the user to track current collections and their attributes as well as historical collections.

- **New from Copy**

(The radio button is activated when a collection is chosen)

Note: This option would typically be used when an existing collection has many fields that are similar to the new collection being added. It is used to reduce re-entry of the bulk of the collection data.

1. Select the collection from which a new copy is to be constructed, and let the screen refresh.
2. Click on the “Add collection” button.
3. Specify the “Create Option” mode “New Copy.”
4. Provide a new name for the collection, then click on “Save” in the same window. This window will then close.
5. The main collection window will refresh to provide data entry fields for the collection.
6. Information can be altered but must be entered for required fields. Required fields are indicated by an asterisk next to the field name.
7. When entry of data is complete, click on the “Save” button at the bottom of the screen.
8. Data will be saved and the screen refreshed, showing that the collection was created.

- **Import**

Note: This option would typically be used when you have a file or can create a file with one or more collection entries.

1. Click on the “Add collection” button at the bottom of the Collection Info screen.
2. In the Create Options pop-up window, first select the “Import” radio button, and then click on the “Add Collection” button in the window.

April 2014

3. The Collection Upload screen is returned.
4. If you require a copy of the Collection file template, select "Collection" in the "DataSpecs Component Type" drop-down box, and then click on the "Download Template" button. The File Download screen allows you to save the "Collections.xls" file or open it.
5. Enter the collection data that you want to upload into the template rows. Each collection is entered as a separate row. Save the EXCEL file. (NOTE: DataSpecs uses EXCEL 97-2003 Workbook file format for this purpose.)
6. Select "Collection" in the "DataSpecs Component Type" drop-down box.
7. Either browse to locate the name of the "File to Import", or enter the directory and file name information for the prepared file.
8. Select the "Validate and Import" button.
9. If there are errors in the Import file, a violations message(s) will be displayed. You can print the error message, or Print or Save the Violation
10. Correct any errors in the file; save the file again. Return to step 6.
11. When the DataSpecs message "No violation occurs, please click on upload" is returned, click the "OK" button on the message screen.
12. Click on the "Upload" button.
13. A "Success" screen is displayed with a count of the collection records loaded.

Edit a Collection

To edit Collection information, use the following steps:

1. Choose the collection to be edited in the "Collection Name" drop-down list. (Click on the down arrow located on the right side of the "Collection Name" box to view the drop-down list.)
2. The window refreshes and presents the information on the selected collection.
3. Make your changes to the collection data.
4. Save the updated Collection Info by clicking the "Save" button at the bottom of the window.

You may also locate the Collection entry to be edited by using the Data Grid View and scrolling through the Collection names to locate a specific entry.

Remove a Collection

To remove a collection, use the following steps:

1. Choose the collection to be edited in the "Collection Name" drop-down list. (Click on the down arrow located on the right side of the "Collection Name" box to view the drop-down list.)
2. The window refreshes and presents the information on the selected collection.
3. When a Collection is selected, the button bar at the bottom of the screen includes two additional buttons: "File Specs Report" and "Remove Collection."



Figure 9 - Expanded Button Bar

4. To delete the Collection entry, select the "Remove Collection" button.
5. A popup window requires that you confirm the deletion. Click "OK" to proceed.



Figure 10 - Collection Info Deletion Popup

View Collections Info Data Grid

The Data Grid View of the Collection Info is available by clicking the “Data Grid View” button on the bottom Button Bar. Using this view, you can browse Collection Info entries, edit a record, remove an entry, or download the table of collection info data.

For additional detail see the “[Data Grid View](#)” section under General Features.

Edit	Remove	Collection ID	Collection Name	Record Type	Collection Set	Office	Steward	Periodicity	Collection Method	Required	Collection Type	Status	Detail Level	Target Audience	Eff. Date
		228	ASR - Administrator Information-V1	School Administrator	Annual School Report	Office of School Quality	Tester, Jane	Annually, by October 1		Required	Operating Status	Active	Individual	State	08/
		226	ASR - School Information-V1	School Administrator	Fall Early Update	SDE		Annually, by October 1		Required	Operating Status	Active	School	State	08/
		281	ASR - School Information-V2	School Administrator	Fall Early Update	SDE		Annually, by October 1		Required	Operating Status	Active	School		11/
		227	ASR - Teacher Information-V1	Teacher	Annual School Report	Office of School Quality		Annually, by October 1	Flat File Submission	Required	Operating Status	Active	Individual	State	08/
		260	Attendance and Membership (student-level data format)-V1	Teacher				Annual							01/

Figure 11 - Collection Info Data Grid View

To exit this display mode, the “Cancel” button will return you to the Collection Info screen, or you can click on a link in the DataSpecs navigation bars.



Figure 12 - DataSpecs Navigation Bars

Generate Collection Detail Report

To generate a Collection Detail Report:

1. Select the "Collection Name" in the drop-down list.
2. Click the "Collection Details Report" button.

The Collection Details Report lists information about the collection detailing all the items shown in the web view of the collection. For further discussion regarding the [Detail Report](#) see that section under General Features.

Collections→Collection Item

The Collection Item screen displays the current list of unique data items for a selected Collection. Collection Items are listed in the window on the left side of the screen. Details and constraints for each existing item can be viewed and edited in the fields on the right side of the form. The Collection Item functions allow you to:

- Add collection item entries
- Upload collection items for one or more collections
- Update or edit collection items
- Remove one or more collection items
- View a specific collection item entry
- View a set of collection item entries
- Generate Collection Items Reports

Collections Info Screen Layout & Description

When you select "Collection Item" from the upper menu bar, the following screen is returned:

ESP Solutions Group

NATIONAL EDUCATION DATA MODEL

ESP Solutions Group
DataSpecs™

Collections Repositories Outputs and Reports Elements Option Sets Search Support CourseWalk™ System Administration

Collection Info Collection Item Collection Cycle Collection Level Rules Associated Links

Home > Collections > Collection Item

Welcome Testuser, Testuser Logout

Collection Item

☒ Active Only

Collection Name*
--Select--

☐ Section Information

Basic Information

Section Number	Item Number	Nest Level

Item* Required
--Select--

Display Name Repeatable
☐

File Or Field Name

Prompt Target Audience
--Select--

Definition

Item Characteristics

Data Type	Format	Data Length	Min Value	Max Value	Precision
--Select--					

Default Value Formula D3M Element
--Select--

Element Option Set
--Select--

Ownership

Responsible Office Item Steward
--Select--

Mandate

Mandate

History Tracking

Effective Date* (MM/DD/YYYY)	Expiration Date (MM/DD/YYYY)	Version*
4/22/2014		1

Data Grid View Save Cancel

Figure 13 - Collection Item Screen (composite image)

The data groups on the Collection Item screen include: Collection Information, Basic Information, Item Characteristics, and History Tracking. The screen includes a Collection Item box which will display a list of Collection Items identified for the Collection.

The data fields for the Collection Item screen components are described in the following tables.

Component Metadata – Collection Item – Collection Information		
Field	Definition	Optional(O)/Required(R)
Active Only	A check indicates that the data presented on the screen is filtered to show only current entries. Expired entries (entries where the “expiration date” has passed) remain in the database, but are not displayed within the drop-down list or in the Data Grid view).	
Collection Name	The Collection Name is the drop-down box used to select the unique name or title that represents a defined collection.	R

When a collection includes tables or repeating groups of data, these are documented within DataSpecs as Sections. Collection items are numbered within the data group. Data groups may also be identified by “Nest Level” to document table dimensions. An example of table dimensions would be a two-level table including school year (nest level 1), and grade level (nest level 2), with a student count for the year/grade level.

Component Metadata – Collection item –Basic Information		
Field	Definition	Optional(O)/Required(R)
Section Number	An identifier for the repeating data group Section. (The identifier may be numeric or text.)	O
Item Number	The sequence number of the item within a Section.	O
Nest Level	The number identifying the level of the loop entry.	O
Item	The unique name of the data item within the collection.	R
Required	Indicates a status for data item as “required,” “conditional,” or “optional.” (The available options for this field can be modified by using the “Support” function.)	O
Display Name	The text entry displayed with the item as column header or field name.	O
Repeatable	A checkbox (True/False) entry to denote that the collection item is repeatable within the collection.	O
Prompt	A description or “prompt” that appears for the data item on the collection. Example: If the Item was ‘Entry Date’ an example of the Prompt text could be: The date the child entered school this year.	O
Target Audience	Designates the anticipated “audience” to use the collection item. (free-form text)	O
Definition	The definition of the collection item. (free-form text)	O



Component Metadata – Collection item – Item Characteristics		
Field	Definition	Optional(O)/ Required(R)
Data Type	The data type of the item: Binary/BLOB, Boolean, Date/Time, Memo, Number, Text, etc. (The choices for this list can be edited by the System Administrator.)	O
Format	The format in which the item should be entered or displayed.	O
Data Length	The length of the item if it is defined.	O
Min Value	The minimum value allowed for the item.	O
Max Value	The maximum value allowed for the item.	O
Precision	The number of decimal places for numeric items.	O
Default Value	The default value of the item, if there is one.	O
Formula	The formula used to derive the item, if it is a calculated field.	O
Element	The unique Element to which the item is mapped.	O
Option Set	The Option Set which contains the list of allowed values for the item.	O

Component Metadata – Collection Item – Ownership		
Field	Definition	Optional(O)/ Required(R)
Responsible Office	The office responsible for the data item in this collection.	O
Item Steward	The person responsible for the collection item.	O
Mandate	A description of the source of requirements for the collection. Mandates” might include a legislative act, a section of law, administrative code or procedure, or local policy.	O

Component Metadata – Collection Item – History Tracking		
Field	Definition	Optional(O)/ Required(R)
Effective Date	The beginning date that the collection item, with the specific attributes of the collection, was (or will be) effective.	O
Expiration Date	The date that the collection item, with the specific attributes of the collection, was (or will be) expired.	O
Version	A collection item identifier that indicates a change in the information has occurred from one instance to another. This user defined text field can be helpful with control of various copies.	O

Screen Functionality & Navigation – Collection Item

On the Collection Item screen, you can view and manage information regarding the data items which are organized within a collection. The Collection Items form supports the following actions for the selected Collection:

- Select the “Active Only” Filter to View All Collections or to View Only Active Collections
- Add Collection Items
- Edit Collection Items
- Remove Collection Items
- View Collection Items Data Grid

Select “Active Only” Filter to View All Collection Items or to View Only Active Collection Items.

The “Active Only” check box controls whether all collections are shown or only the active collections are listed in the Collection Name drop-down box. The default is to view active collections only. When you need to look at a non-active collection, uncheck “Active Only” and the window will refresh with a list of all collections in the system.

A collection is active as long as its “Expiration Date” has not passed. Once the “Expiration Date” is reached, a collection is considered “Inactive”.

Entering and Editing Collection Item Data

When entering collection item data, various fields may be edited by the following methods:

- Enter data directly into an editable field
- Select a predefined choice from the drop-down list
- Click on the checkbox or radio button
- Click on the Calendar icon to specify a date for a date field or type the date

Collection Item Names, Item Numbers, and Section Numbers are displayed in the Collection Item box to the top left of the screen. The screen component includes a scroll bar for you to scroll down to view additional Collection Item entries.

When working with Collection Items, you should consider numbering items. DataSpecs is expected to display Collection Items in Item Number sequence.

The fields “Item Steward” and “Responsible Office” may either be selected from the list of “People” or “Offices” or they may be new entries that are added to “People” or “Offices” lists. Information in both fields may be managed directly using SUPPORT -> Offices or SUPPORT -> People.

You select the Collection, using the drop-down list in the Collection Name.

Note: All required fields must be completed before you can “Save” the Collection Item. The required fields are identified on the screen with an asterisk beside the field name.

Add Collection Items

To “Add Collection Items” to a Collection, you will select one of the “Create Options” radio buttons:

- New
- New Version
- New From Copy
- From Element
- Import



- **New**

1. Select the "New" radio button, and use the "Add Item" button in the "Create Options" block.
2. Enter information describing the new Collection Item.
3. Click the "Save" button at the bottom of the window.
4. Data are saved, and the new Collection Item name will be displayed in the Collection Item box.

- **New Version**

(Used when there are slight changes in the Collection Item entry, normally when the change is minor and is time-dependent.)

1. In the Collection Item box at the top left of the screen, select the Collection Item entry to be copied to create the new version.
2. Then click on the "New Version" radio button and use the "Add Item" button in the "Create Options" block.
3. The screen will refresh to display the selected Collection Item information. The "Version" number will be incremented by one.
4. Make necessary changes to the Collection Item information.
5. Click the "Save" button.
6. Data are saved, and the revised Collection Item information is displayed in the Collection Item box. (Collection Item version numbers are displayed at the end of the Collection Item name.)

- **New from Copy**

(Used when the new Collection Item details are similar to another Collection Item entry.)

1. In the Collection Item box at the top left of the screen, select the Collection Item entry to be copied.
2. Then, click on the "New from Copy" radio button and use the "Add Item" button in the "Create Options" block.
3. A pop-up window will display with the Name, Item Number, and Section Number of the copied Collection Item.

Figure 14 - Collection Item Pop-up Box

4. Enter the new Name and, if appropriate, enter Item Number and Section Number. Click the Save button.
5. The screen will refresh with the new Collection Item name, Item Number, and Section Number shown with the copied information from the earlier Collection Item.
6. Make necessary changes to the Collection Item information.
7. Click the "Save" button.

April 2014

8. Data are saved, and the revised Collection Item information is displayed in the Collection Item box.

- **From Element**

(Used when the Element entry includes much of the information for the new Collection Item.)

1. Select the "From Element" radio button and use the "Add Item" button in the "Create Options" block.
2. The Element pop-up box is returned.

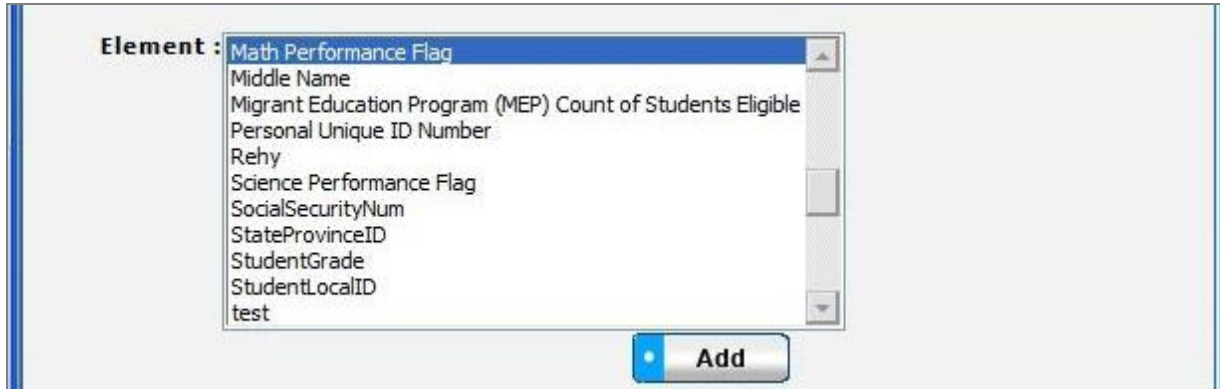


Figure 15 - Copy Element Pop-up Box

3. Select the Element entry to use in the Collection Item. (Scroll bar on right will move up or down the Element list.)
4. Click the "Add" button at the bottom of the pop-up window.
5. The Collection Item screen is returned with the Element name.
6. Edit or enter the additional Collection Item information.
7. Click the "Save" button.
8. Data are saved, and the revised Collection Item information is displayed in the Collection Item box.

Edit Collection Items

Editing Collection Items can be accomplished as follows:

1. Select the Collection Item entry to be copied from the Collection Item box at the top left of the screen. Mouse over the item and click to select it.
2. The screen will refresh to display data for the selected Collection Item.
3. Change the information, as needed.
4. Click the "Save" button at the bottom of the window to save the changes.

Remove a Collection Item

To "Remove a Collection Item," you:

1. Select the Collection Item entry to be deleted in the Collection Item box at the top left of the screen. Mouse over the item and click to select it.
2. The screen will refresh to display data for the selected Collection Item.
3. Click the "Remove Item" button at the bottom of the Collection Item window.

View Collection Item Data Grid

1. Select the Collection Name for Collection Items to be displayed in the Data Grid view.
2. Click on the "Data Grid View" button at the bottom of the screen. The "Collection Item Inventory" screen displays the Collection Items for the selected Collection.
3. Use scroll bars on the right and at the bottom of the table to view all columns and rows.
4. Collection Item entries can be edited or removed using the EDIT or REMOVE buttons available on each entry.
5. For additional detail, see "Data Grid View" section under General Features.

Collections→Collection Items→Map To Repository

The Map to Repository screen documents the relationships between Collection Items and Repository Fields.

Information about data movements and transitions from Collections to Repositories is important in order to identify the impacts of changes to collections and/or repositories. Changes like making new collection timelines, modifying collection option sets, and listing additional storage locations for incoming data sets can be documented to support necessary data management analysis and decision-making.

NOTE: Before you proceed with mapping, the “target” Repository, Repository Table, and Repository Fields to be referenced in the Collection Item mapping process must be entered (loaded) into DataSpecs.

The Map to Repository Screen provides the functions to:

- Map (Link) a Collection Item entry to a Repository Field
- Un-map (remove a link) between a Collection Item and a Repository Field
- View one or all Collection Items with maps (links) to Repository Fields
- Generate a Repository Mapping Detail Report

Screen Layout & Description

When you select “Map to Repository” (a drop-down from “Collection Item” on the upper menu bar), the following screen is returned:

Figure 16 - Collection Item - Map to Repository Screen (composite image)

The groupings of data on the Map to Repository screen include:

- Collection Name
- Collection Item box (where the list of Collection Items will be displayed)
- Item Name (where the selected Collection Item will be listed)
- Repository
- Table Name (the Repository Table Name)
- Field Name (the Repository Field Name)
- Field Description (the Repository Field Definition)

Screen items relating to the Collection and Collection Item are defined within this section of the User's Guide. Definitions for items that reference the Repository Table Name, Field Name, and Field Definition are available in the Repository Section of the User's Guide.

Screen Functionality & Navigation – Collection Item – Map to Repository

You can view and manage information regarding the Collection Item mapping to Repository Field. The Collection Items Form will support the following actions for the selected Collection:

- Select “Active Only” Filter to View All Collections or to View Only Active Collections,
- Map (link) a Collection Item to a Repository Field,
- Un-map (remove the link between) a Collection Item and a Repository Field,
- View Collection Items/Repository Mapping Data Grid, and
- Generate a Repository Mapping Detail Report.

Select “Active Only” Filter to View All Collection Items or to View Only Active Collection Items

The “Active Only” check box controls whether all collections are shown or only the active collections are listed in the Collection Name drop-down box. The default is to view active collections only. When you need to look at a non-active collection, you uncheck “Active Only” and the window will refresh with a list of all collections in the system.

A collection is considered “active” as long as its “Expiration Date” has not passed. Once the “Expiration Date” is reached, a collection is considered “Inactive.”

Map a Collection Item to a Repository Field

When entering the collection item mapping, various fields may be edited by the following methods:

1. Select an entry from the drop-down list
2. Click on the checkbox or radio button
3. Click on the Calendar icon to specify a date for a date field or type the date manually

Collection Item Names, Item Numbers, and Section Numbers are displayed in the Collection Item box to the top left of the screen. The screen component includes a scroll bar for you to scroll down to view additional Collection Item entries.

1. Select the Collection within the Collection Name drop-down box. Click on the Collection Name entry.
2. The screen refreshes. Collection Items for the selected Collection Name are shown in the Collection Item box (Upper left on screen).
3. Select the Collection Item to be linked by clicking on the Item name within the box.
4. The screen refreshes and the Collection Item Name is displayed in the Item Name box.
5. Select the “Order Field List” radio button mode that works for you to locate the Repository Field Name.

April 2014

If you select "Table Order," the Repository Fields are listed in the order they were created in the Table. The selection "Alphabetical Order" will list the fields alphabetically. The example tables below list fields within a "Student Data" Table in the two orders.

"Student Data" fields in Table Order
School Name
First Name
Last Name
Address
Homeroom Teacher

"Student Data" fields in Alphabetical Order
Address
First Name
Homeroom Teacher
Last Name
School Name

1. Select the "target" Repository, Table Name, and Field Name in the respective drop-down boxes.
2. The screen refreshes with each selection. When Field Name is selected, the Field Definition is displayed in the Field Description box.
3. Click on the "Map Item" button at the bottom of the screen.
The map (link) is saved, and the screen is refreshed. The red asterisk at the right of the Collection Item in the Collection Item box indicates that there is a mapping entry for the item.

Un-map a Collection Item and a Repository Field

To Un-map (remove the links between) a Collection Item and a Repository Field, you:

1. Select the Collection Item entry to be un-mapped in the Collection Item box at the top left of the screen. Mouse over the item and click to select it.
2. The screen will refresh to display data for the selected Collection Item.
3. Click the "Un-map" button at the bottom of the window.
4. A pop-up box requests confirmation that you wish to proceed to Un-map the entry.
5. Confirm by clicking "OK" in the pop-up window, or choose the "Cancel" button, if you don't want to remove the link to the Repository Field.

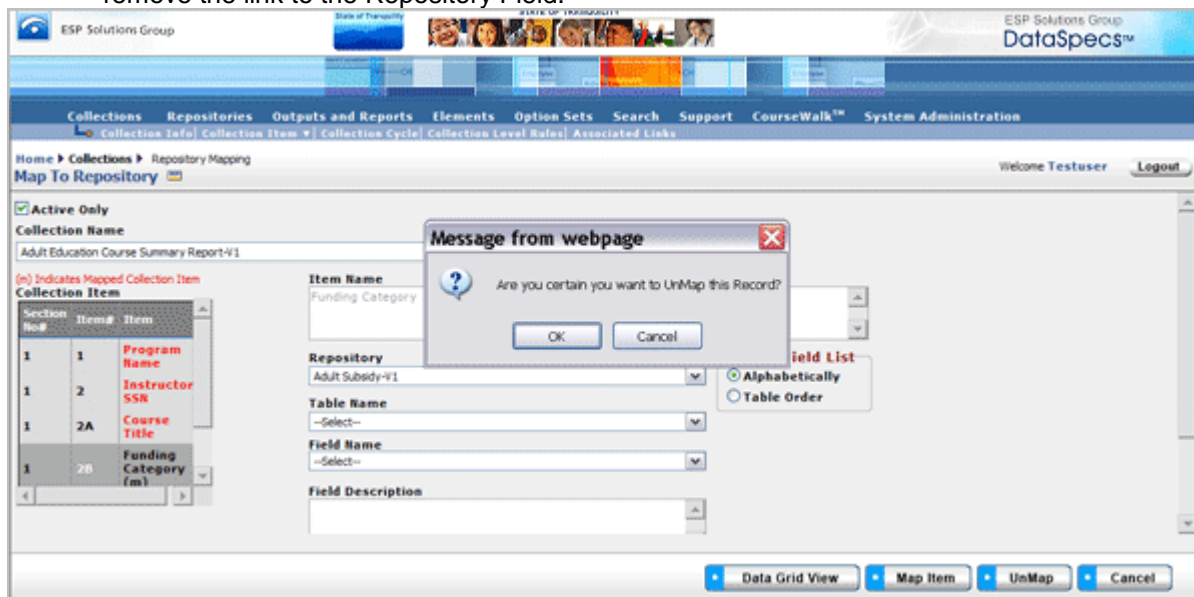


Figure 17 - Un-map Pop-up Confirmation

View Map to Repository Data Grid

To view the data grid of the Map to Repository entry or entries, the following steps can be used.

1. Select the Collection Name for the Collection Items to be displayed in the Data Grid view.
2. Click on the "Data Grid View" button at the bottom of the screen. The "Map to Repository Grid" screen displays the Item Names which have been mapped to a Repository for the selected Collection.
3. Use scroll bars on the right and at the bottom of the table to view all columns and rows.
4. Collection Item entries can be edited or removed, using EDIT or REMOVE buttons available on each entry.
5. For additional detail, see the "Data Grid View" section under General Features.

Generate a Repository Mapping Detail Report

You can generate a Repository Mapping Detail Report, as follows:

1. Select the Collection Name for the Collection Items to be displayed in the Data Grid view.
2. Click on the "Repository Mapping Detail Report" button on the bottom of the screen.



Collections→Collection Items→Map To SIF

The SIF specification and data model support the movement of education data. Mapping Collection Items to SIF specification supports planning, deploying, and managing state or local Collections using SIF specifications.

In the SIF specification, references to elements are not unique to a single object. SIF elements can be used in multiple objects. When mapping (documenting the relationship) Collection Items to SIF object/element entries in DataSpecs, the object reference is required, where the element may be omitted.

Note: Before you proceed with mapping, the “target” SIF specification(s) must be loaded in DataSpecs.

The Map to Repository Screen provides the function to:

- Map (Link) a Collection Item entry to a SIF element in a specific SIF object
- Un-map (remove a link) between a Collection Item and a SIF object/element
- View one or all Collection Items with maps (links) to SIF objects/elements
- Generate a SIF Mapping Detail Report

Screen Layout & Description

When you select “Map to Repository” (a drop-down from “Collection Item” on the upper menu bar, the following screen is returned:

Figure 18 - Collection Item - Map to SIF Screen

The groupings of data on the Map to SIF screen include:

- Collection Name
- Collection Item box (where the list of Collection Items within the selected Collection will be displayed)
- SIF Version
- Item Name (where the name of the selected Collection Item will be listed)
- Object Name (the selected SIF Object Name)
- Element Name (the selected SIF Element Name)
- Element Description (the description of the selected SIF Element)

Screen items relating to Collection and Collection Item are defined earlier in this section of the User's Guide. The entries that reference SIF Version, SIF Object Name, SIF Element Name and SIF Element Description Definition are defined in the table that follows. When you make a selection, the entry is displayed.

Component Metadata – Collection Item – Map to SIF		
Field	Definition	Optional(O)/Required(R)
SIF Version	The version and release of the SIF specification.	R
Object Name	The name of the object within the selected SIF specification.	R
Element Name	The name of the element within the selected SIF specification and object.	O
Element Description	The description of the SIF element from the selected SIF specification. When the SIF Element Name is selected and the specification includes a description, that entry is displayed.	

Screen Functionality & Navigation – Collection Item – Map to SIF

You can view and manage information for the Collection Item mapping to a SIF specification, object, and element. The **Collection Items Map to SIF** form will support the following actions for the selected Collection:

- Select “Active Only” Filter to View All Collections or to View Only Active Collections
- Map (link) a Collection Item to a SIF Object/Element
- Un-map (remove the link between) a Collection Item and a SIF Object/Element
- View Collection Items/SIF Mapping Data Grid
- Generate a SIF Mapping Detail Report

Select “Active Only” Filter to View All Collection Items or to View Only Active Collection Items

The **Active Only** check box controls whether all collections are shown or only the active collections are listed in the Collection Name drop-down box. The default is to view active collections only. When you need to look at a non-active collection, you uncheck **Active Only** and the window will refresh and provide access to all collections in the system in the drop-down box.

A collection is considered active as long as its expiration date has not passed. Once the expiration date is reached, a collection is considered **Inactive**.

Map a Collection Item to a SIF Object/Element

When entering the collection item mapping, various fields may be edited by the following methods:

- Select an entry from the drop-down list
- Click on the checkbox or radio button
- Click on the Calendar icon to specify a date for a date field or type the date

Collection Item Names, Item Numbers, and Section Numbers are displayed in the Collection Item box to the top left of the screen. The screen component includes a scroll bar for you to scroll down to view additional Collection Item entries.

1. Select the collection within the Collection Name drop-down box. Click on the Collection Name entry.
2. The screen refreshes. Collection Items for the selected Collection Name are shown in the Collection Item box (upper left on screen).
3. Select the Collection Item to be linked by clicking on the item name within the box.
4. The screen refreshes and the Collection Item Name is displayed in the Item Name box.
5. Proceed to SIF mapping. The screen refreshes with each selection below.
6. First, select the target SIF Version in the drop-down box.
7. Next, in the Object Name drop-down, select the target SIF object.
8. Then, select the Element Name drop-down entry.
9. When there is a SIF element description or definition, it is shown in the Element Description box.
10. Finally, to save the links, click on the Map Item button at the bottom of the screen.
11. The map (link) is saved, and the screen refreshed, showing a red asterisk at the right of the mapped Collection Items in the Collection Item box.

Un-map a Collection Item and a SIF Object/Element

To Un-map (remove the links between) a Collection Item and a SIF Object/Element, you:

1. Select the collection in the Collection drop-down box.
2. Select the Collection Item entry to be un-mapped in the Collection Item box at the top left of the screen. Mouse over the item and click to select it.
3. The screen will refresh to display data for the selected Collection Item and its SIF Object/Element mapping.
4. Click the Un-map button at the bottom of the window.
5. The screen refreshes with the link removed.

View Map to SIF Data Grid

To generate the Data Grid View of the Map to SIF entry or entries, the following steps can be used.

1. Select the Collection Name for the Collection Items to be displayed in the Data Grid view.
2. Click on the "Data Grid View" button at the bottom of the screen. The "Collection Item SIF Inventory" screen displays the Item Names which have been mapped to a SIF Object/Element for the selected Collection.
3. Use scroll bars on the right and at the bottom of the table to view all columns and rows.
4. Collection Item entries can be edited or removed, using EDIT or REMOVE buttons available on each entry.
5. For additional detail, see the "Data Grid View" section under General Features.

Generate a SIF Mapping Detail Report

You can generate a SIF Mapping Detail Report, as follows:

1. Select the Collection Name for the Collection Items to be displayed in the Data Grid view.
2. Click on the "SIF Mapping Detail Report" button at the bottom of the screen.



Collections → Collection Cycle

DataSpecs supports the documentation of collection cycles. Collection cycle information identifies the coverage period for the data in a collection, the initial window for data submission, and a cross-collection clean-up window. Collection Cycle information includes information required to calculate the data collection “burden” for a collection and each collection cycle.

The Collection Cycle screen includes functions to support:

- Documenting one or more collection cycles for a collection and
- Viewing one or all Collection Cycle entries.

Screen Layout & Description

The Collection Cycle Definition screen is returned when you select Collection Cycle on the second-tier menu bar at the top of the DataSpecs screen.

Figure 19 - Collection Cycle Definition

The Collection Cycle screen includes information in three areas:

- Collection Name, Due Date, and Report Manifest ID,
- Collection date entries (coverage period, collection window, and clean-up window), and
- “Burden” estimates (the “expected number of respondents” and the time required per respondent).

The following table includes definitions of the Collection Cycle entries.

Component Metadata – Collection Cycle		
Field	Definition	Optional(O)/ Required(R)
Due Date	The date when the collection is due to be completed.	R
Report Manifest ID	An identification code or number associated with the collection. A report manifest ID might be used to associate recurring file submissions with the specific collection due date.	O
Coverage Period Start Date	The beginning date of a time period reflected in the data reported for a particular collection due date.	O
Coverage Period End Date	The final date of a time period reflected in the data reported for a particular collection due date.	O
Collection Window Opening Date	The date on which data collection begins.	O
Collection Window Closing Date	The date on which data collection ends.	O
Cross-Collection Clean-Up Window Opening Date	The beginning date of the period of time allowed for resolving data issues/edits across collections.	O
Cross-Collection Clean-Up Window Closing Date	The ending date of the period of time allowed for resolution of data issues/edits across collections.	O
Expected Number of Respondents	The number of organizations, submitters or entities completing this collection.	O
Time Per Respondent	An estimate of the time required (on average) by a respondent to complete this collection.	O
Collection Burden	The estimated total “people hours” (staff time) required to complete this collection. The total is calculated by multiplying “Expected Number of Respondents” by the “Time Per Respondent.”	



Screen Functionality & Navigation – Collection – Collection Cycle

The Collection Cycle form captures dates for a collection and information on the burden of the collection relating to the reporting cycle.

With this form, you can:

- Select the “Active Only” Filter to View All Collections or to View Only Active Collections
- Add a Collection Cycle definition
- Edit a Collection Cycle entry
- Delete a Collection Cycle entry
- View Collection Cycle Data Grid

Select the “Active Only” Filter to View All Collection Items or to View Only Active Collection Items

The Active Only check box controls whether all collections in the Collection Name drop-down box are shown or only the active collections. The default is to view the active collections only. When you need to look at a non-active collection, you uncheck “Active Only” and the window will refresh with a list of all collections in the system.

Entering and Editing Collection Cycle Data

When entering collection cycle data, various fields may be edited by the following methods:

- Enter data directly into an editable field
- Select a predefined choice from the drop-down list
- Click on the checkbox or radio button
- Click on the calendar icon to specify a date for a date field, or type the date

Add a Collection Cycle

You create the collection cycle definition as follows:

1. Select the Collection from the drop-down box at the top of the form.
2. Select the Collection Due Date in the drop-down box.
3. Enter a Report Manifest Identification code for the collection/due date. This entry should be a unique identifier for the collection/due date.
4. For the Collection Coverage Period, Collection Window, and Clean-Up Window, you may enter:
 - a. Coverage Period Start Date and End Date,
 - b. Collection Window Opening and Closing Dates, and
 - c. Cross-Collection Clean-Up Opening and Closing Dates.
 - i. The date entries can be selected by using the calendar icon next to the date entry field.
5. Enter information to estimate “data burden”:
 - a. Expected Number of Respondents.
 - b. Time Per Respondent.
6. The Collection Burden entry is a calculated entry, created by multiplying the time entry by the number of respondents.
7. Use the “Save” button at the bottom of the screen to store the cycle definition to the database.

• **Define Another**

You can create an additional Cycle Definition for the same collection, as follows:

1. Click the “Define Another” button at the bottom of the screen to clear the form.

2. The "Collection Name" is unchanged, so that another definition may be created for that collection. You may alternately select a new collection in the "Collection Name" drop-down.
3. Enter the collection cycle information and collection burden information following steps 2 through 6 in Add a Collection Cycle (above).
4. Click "Save" to store this Cycle Definition.

Edit a Collection Cycle

To edit a collection cycle entry, you will:

1. Select a "Collection Name" and "Due Date." The two fields uniquely identify the existing Collection Cycle Definition.
2. The screen refreshes with the cycle definition data for the specified Collection.
3. Make the necessary changes.
4. Click on the "Save" button to store the entry.
5. The screen will refresh and redisplay the updated collection cycle definition.

Remove a Collection Cycle

You can remove a collection cycle entry by following these steps:

1. Select a "Collection Name" and "Due Date."
2. Wait for the screen to refresh with the cycle definition data for the specified Collection.
3. Click on the "Remove" button to delete the entry.
4. Confirm or cancel the deletion in the pop-up window.
5. Click "OK" to affirm the removal.
6. The window will refresh to a blank Collection Cycle Definition screen.

View Collection Cycle Definition Data – Grid Formatted

You may select a Collection Cycle entry to edit or delete using the Data Grid View.

1. Click on the "Data Grid View" button at the bottom of the screen.
2. The "Collection Schedule Inventory" screen below is returned.

ESP Solutions Group

STATE OF TRANQUILITY

ESP Solutions Group DataSpecs™

Collections Repositories Outputs and Reports Elements Option Sets Search Support CourseWalk™ System Administration

Collection Info Collection Item Collection Cycle Collection Level Rules Associated Links

Home > Collection >

Collection Schedule Inventory

Welcome Testuser Logout

Page Size: Set

Edit	Remove	JID	Collection ID	Collection	Due Date	R.Manifest ID	Start Date	End Date	W.Opening Date	W.Closing Date	C.C.Opening Date	C.C.Closing Date	Exp NO
		34	228	ASR - Administrator Information-V1	11/01/2007				09/17/2007	11/02/2007			1605
		33	226	ASR - School Information-V1	11/01/2008		10/01/2007	10/01/2007	09/22/2008	11/08/2008	10/01/2008	12/01/2008	1605
		43	281	ASR - School Information-V2	11/01/2008		10/01/2007	10/01/2007	09/22/2008	11/08/2008	10/01/2008	12/01/2008	1605
		45	281	ASR - School Information-V2	01/15/2009		12/01/2008	12/01/2008	11/01/2008	01/15/2009	01/01/2009	02/01/2009	72
		46	281	ASR - School Information-V2	03/01/2009		03/01/2009	04/01/2009	01/15/2009	03/01/2009	03/01/2009	05/01/2009	72
		47	281	ASR - School Information-V2	06/15/2009		05/01/2009	06/01/2009	04/15/2009	06/15/2009	06/01/2009	06/30/2009	

ViewAll Download Cancel

Best viewed in 1024*768 resolution

ESP Solutions Group

Figure 20 - Collection Schedule Inventory Screen

- When you select a Collection Name, the definitions relating to that Collection Name are presented in a grid layout. If no Collection was selected, all cycle definitions are presented.
- Select an entry for editing or deletion using the Edit or Remove icons to the left of the selected entry, or download entries shown, using the Download button at the bottom of the screen.

For further details see the [Data Grid View](#) section under General Features.

Collections→Collection Level Rules

The Collection Level Rules screen supports the documentation of validation rules for a Collection. Rule descriptions may include both text descriptions and logic or pseudo-code statements. Rules may be associated to one or more Collection Items.

All Rules are associated with a Collection Name and one or more Field Names (also known as Data Items) within the Collection. Each of those Collection entries should be created before attempting to enter rules.

Collection Level Rules screen functionality includes capabilities to:

- Add a single collection level rule entry,
- Upload (Import) rule entries for one or more collections,
- Edit a collection level rule entry,
- Remove a rule entry,
- View collection rule entries in a Data Grid, and
- Generate a Rules Details Report.

April 2014

Collection Level Rules Screen Layout & Description

The following screen is displayed when you select the entry “Collection Level Rules” on the second-tier menu bar.

The screenshot displays the 'Collection Level Rules' screen within the DataSpecs application. The interface features a top navigation bar with tabs for Collections, Repositories, Outputs and Reports, Elements, Option Sets, Search, Support, CourseWalk™, and System Administration. Below the navigation bar, the 'Collection Level Rules' section is active, showing a form for defining rules. The form includes fields for 'Collection Name', 'Rule ID', 'Rule Description', 'Business Rule Logic', 'Rule Official Message/Summary Description', 'Rule Detail Message/Description', 'List of Field Names', 'Field Name(s) to associate with Rule', 'Severity' (with radio buttons for Fatal and Warning), 'Effective Date', and 'Expiration Date'. The 'Active Only' checkbox is checked. The bottom toolbar contains buttons for Import, New, Data Grid View, Rules Details Report, Save, and Cancel.

Figure 21 - Collection Level Rules Screen (composite image)

The information for the Collection Level Rules screen supports documentation of rules information for a collection and may reference one or more collection fields. The following table identifies the fields available to document Collection Level Rules.

Component Metadata – Collection - Collection Level Rules		
Field	Definition	Optional(O)/ Required(R)
Active Only	A check indicates that the data presented on the screen is filtered to show only current collection entries. Expired entries (entries where the expiration date has passed) remain in the database, but are not displayed within the drop-down list or the Data Grid view).	
Collection Name	The unique name or title that represents a defined collection. This entry is a drop-down box for selection of the collection to which a rule is associated.	R
Rules	The user-defined name for a Rule.	R
Rule ID	A unique identification number for the rule within this collection. (The Rule ID must be numeric.)	O
Rule Description	Description of the issue or error the rule is designed to address. (Example: "Verify that the Student Name includes First Name and Last Name, at a minimum.")	O
Rule Official Message / Summary Description	A summary message to be displayed or reported when execution of the rule fails. This official message would be shown on a summary page of an error report. There may be multiple records that violate this rule.	O
Business Rule Logic	A narrative statement of the rule. This may be "pseudo-code" statement(s). This text is intended for the rule implementers or developers.	O
Rule Detail Message / Description	A text description of the detailed message which may be displayed or reported when a rule violation is encountered. This text would be displayed with the specific record where the error is identified. The text may reference the specific field and its contents in the record that failed the rule.	O
List of Field Names	A pick-list of Collection Item names which may be selected for use in the rule.	O
Field Name(s) to associate with Rule	The Collection Item name(s) associated with the rule. The selected fields are highlighted in the error reporting when the rule is violated.	R
Severity	A radio-button selection to reflect the severity of the rule violation as either "Fatal" or "Warning."	R
Effective Date	The date when the rule begins or began to be used.	R
Expiration Date	The date when the rule will no longer be used.	O



Screen Functionality & Navigation – Collection Level Rules

You can document data rules for Collections, using the Collection Level Rules screen. The Collection form provides the following actions:

- Select “Active Only” Filter to View All Collections or to View Only Active Collections
- Add a Collection Level Rule
- Edit a Collection Level Rule
- Remove a Collection Level Rule
- View Collection Level Rule Data Grid
- Generate a Collection Level Rule Details Report

Select “Active Only” Filter to View All Collections or to View Only Active Collections

The “Active Only” check box controls whether all collections are shown or only the active collections are listed in the Collection Name drop-down box. The default is to view active collections only.

A collection is active as long as its expiration date has not passed. Once the expiration date is reached, a collection is marked “Inactive.”

Add a Collection Level Rule

To add a Collection Level Rule, you would:

- Select the “New” link (next to “Rules” box)

OR

- Click on “New” button at the bottom of the screen.

A blank form is presented for entry of the new rules information.

When you use the “New” button, the “Create Options” pop-up screen provides radio-button selections to either:

- Add New,

OR

- New from Copy. (The “New from Copy” selection is enabled once a Collection Name is selected.)

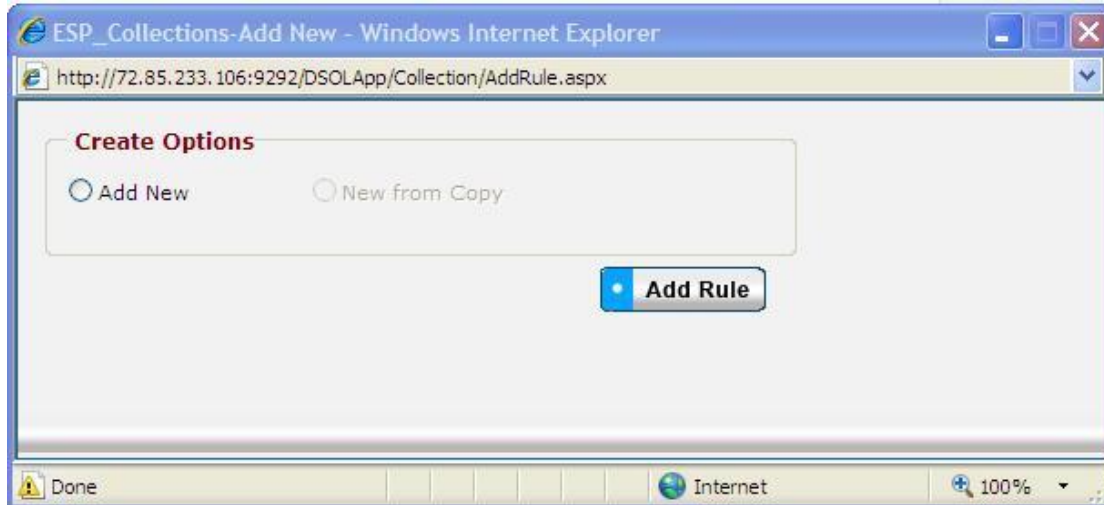


Figure 22 - Create Options Pop-up

- **Add New**

1. Select "Add New" radio button and then click "Add Rule" button.
2. Select the "Collection Name" (drop-down list) to which the rule pertains.
3. Enter the Rule name in "Rules" box (required entry). The Rule name must be unique for the selected Collection.
4. Select Field Name(s) to which the Rule applies.
 - a. Field Names for the Collection Name are offered in the "List of Field Names" box.
 - b. Mouse-over the names and click to select.
 - c. The selected Field Name appears in the box titled "Field Name(s) to associate with Rule."
5. Reset Effective Date for the Rule, if necessary.
6. Enter the rule descriptive information (Rule ID, Rule Description, Rule Official Message/Summary Description, Business Rule Logic, and Rule Detail Message/Description, Severity, and/or Expiration Date).
7. Click the "Save" button at the bottom of the screen to store this rule in the rules inventory for this collection.

- **New From Copy**

Note: You would typically use this creation mode when an existing collection has many fields that are similar to the new collection being added, and you want to minimize reentry of the bulk of the collection rule information.

1. Select Collection Name and Rule from which you want to construct the new rule. The screen will refresh and display the information for the existing Rule entry.
6. Click on "Add Rule" button.
7. Specify the "Create Option" mode as "New Copy."
8. The user will be asked to provide a new name for the collection and then click on "Save" in the same window; this window will then close.
9. The main collection window will refresh to provide data entry fields for the collection.
10. Information can be altered but must be entered for required fields. Required fields are indicated by an asterisk next to the field name.
11. When entry of data is complete, click on the "Save" button at the bottom of the screen.
12. Data will be saved and the screen refreshed, showing that the collection was created.

Upload (Import) Rule Entries

This option would typically be used to migrate or move a large quantity of data from an existing environment into this one.

Note: This option would typically be used when you have a file or can create a file with one or more repository entries.

1. Select the "Import" button at the bottom of the screen.
2. The Collection Upload screen is returned.
3. If you require a copy of the Collection Level Rules template, select "Collection Level Rule" in the "DataSpecs Component Type" drop-down box, and then click on the "Download Template" button. The File Download screen allows you to save the "CollectionLevelRules.xls" file or open it.
4. Load or enter the Collection Level Rules information that you want to upload into the template rows. (Each rule entry is entered as a separate row.) Save the EXCEL file. (NOTE: DataSpecs uses EXCEL 97-2003 Workbook file format for this purpose.)
5. Return to the DataSpecs Collections Upload screen.
6. Select "Collection Level Rule" in the "DataSpecs Component Type" drop-down box.
7. Either browse to locate the name of the "File to Import," or enter the directory and file name information for the file you wish to load.
8. Click the "Validate and Import" button.
9. If there are errors in the Import file, Violations message(s) will be displayed. You can print the error message, or Print or Save the Violation spreadsheet.
10. Correct any errors in the file. Save the corrected file. And, return to step 6.
11. When the DataSpecs message "No violation occurs, please click on upload" is returned, respond "OK" button on the message screen.
12. Click on the "Upload" button.
13. A "Success" screen is displayed with a count of the collection level rule entries loaded.

Edit a Collection Level Rule

1. Select the Collection and existing rule from the "Rules" drop-down list. The screen will refresh as you make each selection.
2. The rule form will be populated with data for the rule that you selected.
3. Modify field(s) as desired.
4. To edit the name of the rule, click on the "Edit" link beside the "Rules" box.
5. Click the "Save" button at the bottom of the screen to store the updated rule.

Note: Edit can also be performed via the "Data Grid View."

Remove a Collection Level Rule

You can remove a Collection Level Rule entry by following these steps:

1. Select a Collection and existing rule from the Rules drop-down list. The screen will refresh as you make each selection.
2. The rule form will be populated with data for the selected rule.
3. Click the "Remove" button at the bottom of the screen to delete the specified rule.
4. Confirm or cancel the deletion in the pop-up window.
5. Click "OK" to affirm the removal.
6. The window will refresh with a blank Collection Level Rule screen.

View Collection Rule Data – Grid Formatted

View Collection Rule entries in a Data Grid format by following these steps:

April 2014

1. Select the Collection Name for the Collection Level Rules to be displayed in the Data Grid view,
2. Click the “Data Grid View” button at the bottom of the screen. The “Collection Level Rule Inventory” screen displays the Rules that are available for the selected Collection.
3. Use scroll bars on right and at bottom of the table to view all columns and rows.
4. Collection Level Rules can be edited or removed, using EDIT or REMOVE buttons available on each entry.
5. For additional detail, see “Data Grid View” section under General Features.

Edit	Remove	Collection Id	Rule	Collection	Collection Item	Rule Id	Fatal	Warning	Effective Date	Expiration Date
		189	test 5.6.2.1+	test 5.2.6.1+-V2	test 5.2.6.1+1-V2	1234	True	False	10/21/2009	10/15/2009

Figure 23 - Collection Rule Data Grid View

Generate Rules Detail Report

To generate a Rules Detail Report:

1. Select a Collection and an existing rule from the “Rules” drop-down list. The screen will refresh as you make each selection.
2. Information for the selected rule will be displayed.
3. Click the “Rules Details Report” button at the bottom of the screen to generate the report.

The Rules Details Report lists information about the rules detailing all the items shown in the web view. For further discussion regarding the [Detail Report](#) see that section under General Features.

Collections → Associated Links

Collections → Associated Links documents the hyperlinks to Collection materials, which might include collection documentation, related information, and other websites.

Collections → Associated Links Screen Layout & Description

The Associated Links screen, shown below, is returned when the “Associated Links” option is selected on the second-tier navigation bar at the top of the screen.

The screenshot displays the 'Associated Links' screen within the DataSpecs application. The top navigation bar includes 'Collections', 'Repositories', 'Outputs and Reports', 'Elements', 'Option Sets', 'Search', 'Support', 'CourseWalk™', and 'System Administration'. The 'Associated Links' option is selected under the 'Collections' menu. The main content area is titled 'Associated Links' and features a form for managing links. The form includes a 'Collection Name' dropdown menu (currently showing 'ASR - School Information-V2'), a list of 'Associated Links' (including 'ASR - School Information User Guide' and 'ASR - School Information December 1 Specifications'), and a detailed form for the selected link. This detailed form contains fields for 'Associated Link *', 'Link Description', 'Link URL *', and 'Notes'. At the bottom of the screen, there are buttons for 'Import', 'Data Grid View', 'Add', 'Save', and 'Cancel'. The footer indicates the screen is best viewed in 1024*768 resolution and shows the 'ESP Solutions Group' logo.

Figure 24 - Collections Associated Links Screen

The areas on the screen include: Collection Name and Associated Links, and the Associated Link Information grouping.

Component Metadata – Collections – Associated Links		
Screen Item	Definition	Optional(O)/Required(R)
Collection Name *	A user-defined unique name or title that represents a collection.	R
Associated Links	The list of selectable Associated Links which have been associated with the chosen collection. Link entries are shown in this box (on the upper left of the screen) when the entry is “added.”	

Description	A narrative description of the contents of the associated links entry.	O
Associated Link Info		
Screen Item	Definition	Optional(O)/Required(R)
Associated Link	The user-defined name of the Associated Link related to the Link URL.	R
Link Description	The free-form text description of the Associated Link.	O
Link URL	The hyperlink URL (uniform resource locator) specifying where the Associated Link is available.	R
Notes	The free-form text notes about the Associated Link.	O

Screen Functionality & Navigation – Associated Links

The Associated Links screen supports the following actions:

- Select “Active Only” filter to list all Associated Links related to the chosen Collection Name, or to list only active Associated Links
- Add an Associated Link
- Import Associated Link(s) entries
- Edit an Associated Link
- Delete an Associated Link
- View Associated Links Data Grid

Select “Active Only” Filter to View All Associated Links or to View Only Active Associated Links

The “Active Only” check box controls whether all entries for Collection Associated Links are shown or only the active entries are listed in the drop-down boxes on this screen. The default is to view active entries only. When you need to look at a non-active (expired or future) entry, you uncheck “Active Only” and the window will refresh with drop-down lists of all entries in the system.

An entry is active as long as its expiration date has not passed. Once the expiration date is reached, a repository is considered “Inactive”.

Add an Associated Link

To add an Associated Link, complete the following steps:

1. Select the “Collection Name” in the drop-down list in the upper left of the screen.
2. The screen will refresh and display Associated Links (if any) which are already associated with the chosen Collection.
3. Click the “Add” button at the bottom of the screen. The screen will refresh with blank fields in the Associated Link Info area.
4. Enter the metadata associated with the new link entry.
5. Click the “Save” button at the bottom of the window.
6. The new Associated Link entry will be saved and the link name will be listed in the “Associated Links” box in the upper left of the screen.

Import Associated Links

The Import functionality is useful to migrate or move a large volume of data into DataSpecs. Import is typically used when you have a file or can create a file with one or more Associated Link entries.

1. At the Associated Links screen, click the "Import" button on the bottom bar.
2. The Collection Upload screen is returned.
3. Select "Collection Associated Links" in the DataSpecs Component Type drop-down box.
4. If you require a copy of the Collection Associated Links template, click the "Download Template" button. The File Download screen allows you to save the "CollectionAssociatedLinks.xls" file or open it. (NOTE: DataSpecs uses EXCEL 97-2003 Workbook file format for this purpose.)
5. Enter or load the Collections Associated Links data that you want to upload into the template rows. Each repository table entry is loaded as a separate row. Save the EXCEL file with a unique file name.
6. Select "Collection Associated Links" in the "DataSpecs Component Type" drop-down box.
7. Either browse to locate the name of the "File to Import", or type the directory and file name information for the file to be imported.
8. Click the "Validate and Import" button.
9. If there are errors in the Import file, violations message(s) will be displayed. Print or Save the violation spreadsheet.
10. Correct any errors in the file. Save the corrected file and return to step 6.
11. When the DataSpecs message "No violation occurs, please click on upload" is returned, respond with the "OK" button on the message screen.
12. Click on the "Upload" button.
13. A "Success" screen is displayed with a count of the collection records loaded.

Edit an Associated Link Entry

To edit an Associated Link entry, you will:

1. Select the "Collection Name" in the drop-down list in the upper left-hand corner of the screen.
2. The screen will refresh and display Associated Links (if any) which are already associated with the chosen Collection.
3. Select the Associated Link entry that you wish to edit from those listed in the "Associated Links" window. (Mouse over the entries and click.) The screen will refresh and display the information for the Associated Link.
4. Make the necessary modifications for the entry.
5. Click the "Save" button at the bottom of the window.
6. The updated Associated Link entry will be saved.

Delete an Associated Link Entry

To remove an Associated Link entry, you will:

1. Select the "Collection Name" in the drop-down list in the upper left of the screen.
2. The screen will refresh and display Associated Links (if any) which are already associated with the chosen Collection.
3. Select the Associated Link entry that you wish to edit from those listed in the "Associated Links" window. (Mouse over the entries and click.) The screen will refresh and display the information for the Associated Link and the "Remove" button will be included at the bottom of the screen.



Figure 25 - Collections Associated Links Delete Button Bar

4. Click the "Remove Field" button. A pop-up window is presented asking for verification of deletion.



Figure 26 - Collection Associated Link Delete Pop-up

5. Respond by clicking "OK" to complete the deletion.
6. The record is deleted, and the Repository Fields window refreshes.

View Collection Associated Links Data Grid

For a "grid" view of the Collection Associated Links, click on the "Data Grid View" button at the bottom of the window. You can select a specific Associated Link entry to view or edit, delete, or download Associated Links information for other uses. For further detail see [Data Grid View](#) section in the General Features section.

Repositories

Repositories Functionality

Repositories functionality is provided to support the following Data Inventory steps:

20. Load **Repositories**, **Tables**, and **Repository Fields**.
21. Relate Repository Fields to available Data Dictionary Elements, and add Element entries as needed for Repository Fields.
22. Relate Repository Fields to available Option Sets, adding Option Sets and Options as needed for Repository Fields.
19. Enter information on the Associated Links to Internet resources on documentation, rules, submission sites, etc., for Collections, Repositories, and Outputs/Reports.

You will access Repositories functions by using the second-level navigation bar at the top of the screen. The navigation bar includes the following components:

- Repository Info
- Repository Table Info
- Table Fields
- Associated Links

Repositories→Repository Info

Repository Info includes general information on repositories. The screen functionality will allow you to:

- Add a single Repository Info entry
- Upload Repository Info for one or more repositories
- Update or Edit a Repository Info entry
- Delete a Repository Info entry
- View a specific Repository Info entry
- View a set of Repository Info entries
- Generate a Repository Details Report

Repository Info Screen Layout & Description

The following screen is returned when you select "Repository Info" on the second-tier menu bar at the top of the screen.

The screenshot shows the 'Repository Info' screen. At the top, there's a navigation bar with links like 'Collections', 'Repositories', 'Outputs and Reports', etc. Below that, a 'Home' link and a 'Repositories' link are visible. The main content area is titled 'Repository' and contains several sections: 'Basic Information' with a 'Active Only' checkbox, 'Repository Name' dropdown, 'Status' dropdown, 'Repository type' dropdown, and a 'Description' text area; 'File Server' with 'File Server Name', 'IP Address', and 'Database/Instance Name' text boxes; 'Ownership' with 'Responsible Office' dropdown, 'Contacts' text area, and 'Phone', 'Extension', and 'Email' text boxes; 'History Tracking' with 'Effective Date', 'Expiration Date', and 'Version' text boxes; and 'Database Software' with 'Title' and 'Version' text boxes. At the bottom, there are buttons for 'Data Grid View', 'Add Repository', 'Repository Details Report', 'Save', and 'Cancel'.

Figure 27 - Repository Info Screen (composite image)

The groupings of data on the Repository screen includes: Basic Information, File Server, Ownership, History Tracking, and Database Software. The fields within these components are defined in the tables that follow, and each field is identified as either Required or Optional.

Component Metadata – Repositories - Repository Info		
Basic Information		
Screen Item	Definition	Optional(O)/Required(R)
Repository Name *	A user-defined unique name or title that represents a repository.	R
Status	The status of the repository: Active, Being Revised, Consolidated, Inactive, Retired and Under Review. The choices for this list can be edited in the table System Options.	O
Repository Type	The type of Repository: Staging, Development, Operational, Data Warehouse, etc. The choices for this list can be edited in the table System Options.	O
Description	A narrative description of the contents of the repository: its tables, table fields, etc.	O

File Server		
Screen Item	Definition	Optional(O)/Required(R)
File Server Name	The name of the file server which houses the repository.	O
IP Address	The address of the file server denoting its location on the enterprise network(s).	O
Database / Instance Name	The name of the database instance (the complete database environment and processes) for the repository. (Examples might include: "Production," "Test," or "Staging.")	O

History Tracking		
Screen Item	Definition	Optional(O)/Required(R)
Effective Date	The beginning date that the repository was (or will be) effective.	R
Expiration Date	The date that the repository was (or will be) expired.	O
Version	An identifier of a repository with a specific set of characteristics. Version is to indicate a change in the information has occurred from one instance to another. (The version identifier can help to identify specific copies of the repository.)	O

Database Software		
Screen Item	Definition	Optional(O)/Required(R)
Title	The name of the database management system software within which the repository data are housed. (Examples: Oracle, SQL Server, Microsoft Access, etc.)	O
Version	The version of the database software used for managing the repository.	O

Screen Functionality & Navigation – Repositories Info

The Repository screen provides the following actions:

- Select "Active Only" filter to list all repositories in the Repository Name drop-down list or to list only active repositories
- Add a Repository
- Edit a Repository
- Remove a Repository
- View Repository Data Grid
- Generate the Repository Details Report

Note: All required fields must have data assigned for the "Save" to occur. The required fields are denoted by an asterisk at the end of the field name.

“Active Only” Filter to View All Repositories or to View Only Active Repositories

The “Active Only” check box controls whether all repositories are shown or only the active ones are listed in the Repository Name drop-down box. The default is to view active repositories only.

A repository is active as long as its “Expiration Date” has not passed. Once the “Expiration Date” is reached, a repository is considered to be “Inactive.” In the course of normal data dictionary maintenance, you should make “inactive” those repositories whose expiration dates have passed.

Entering and Editing Repository Data

When entering repository data, various fields may be edited by the following methods:

- Enter data directly into an editable field.
- Select a predefined choice from the drop-down list.
- Click on the checkbox or radio button.
- Click on the Calendar icon to specify a date for a date field or type the date.

The fields “Responsible Office” and “Contacts” may either be selected from the list of “People” or “Offices” or they may be new entries that are added to “People” or “Offices” lists. Information in both fields may be managed directly using SUPPORT->Offices or SUPPORT->People.

Add a Repository

To add a Repository, select “New” (displayed next to the Repository Name box) or use the “Add Repository” button at the bottom of the screen.

The screen will refresh to allow for data entry to create a new entry.

When you click on the “Add Repository” button, DataSpecs will present the “Create Options” pop-up window. This screen provides options to enter or load one or more new repository entries. These “Create Options” are:

- Add New
- New from Copy
- New Version
- Import

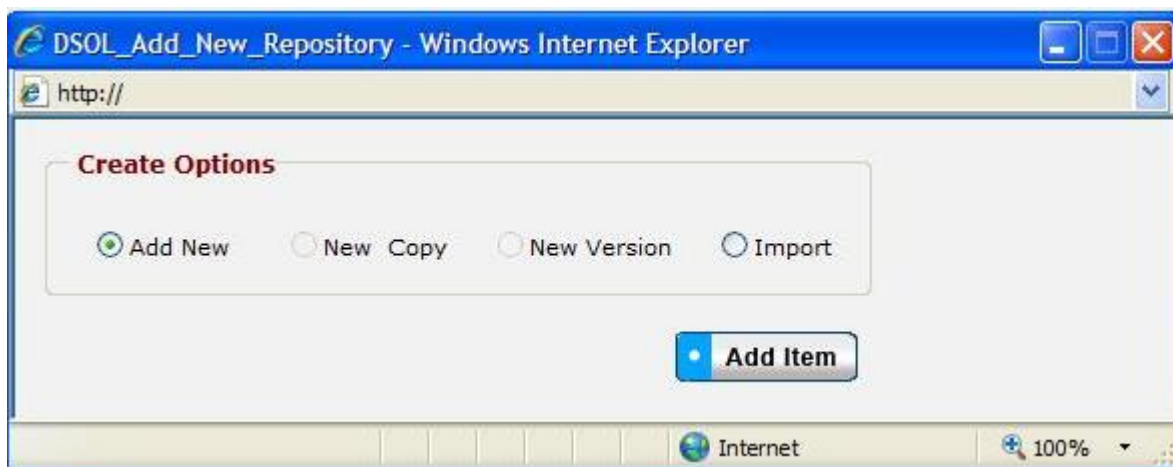


Figure 28 - Repository Create Options Pop-up Window

“Add New,” “New Copy,” and “New Version” selections each support entering or creating a single repository entry. The “Import” selection supports loading one or more repository info entries.

- **Add New**

1. Click on “New” link or use the “Add Repository” button specifying “Add New” from the Create Options pop-up window.
2. Enter the required fields – Repository Name, Effective Date, and Version. “Version” will have the default value of 1.
3. Enter other fields, as desired.
4. When data entry is complete, click on the “Save” button at the bottom of the Repository screen to store the repository information.

- **New Copy**

(The “New Copy” radio button is activated when a repository is chosen.)

Note: You can use New Copy when an existing Repository entry has minor changes, like a changed file server location.

1. Select the repository entry that you want to copy in the “Repository Name” drop-down list.
2. Click the “Add Repository” button at the bottom of the screen.
3. The “Create Options” pop-up window is returned.
4. Use the “New Copy” radio button in the “Create Options” pop-up window, and then click “Add Item” button.
5. The “Edit Repository Name” pop-up displays.

Figure 29 - Repository New from Copy Pop-up Window

6. Enter the new Repository Name and click the “Save” button. The Repository screen will be refreshed with the new Repository Name in the box.
7. Other repository information can be changed. All required fields must be complete.
8. Click on the “Save” button at the bottom of the screen.
9. The data will be saved and the screen refreshed, showing the repository created.

- **New Version**

(The “New Version” radio button is activated when a repository is chosen.)

Note: This option would typically be used when an existing Repository entry has minor modifications, like a change to the database environment. Entries are unique when effective date and/or version number are different. Versioning helps to maintain information on current repositories and their attributes, as well as past and future repositories.

1. Select the repository entry that you want to copy in the “Repository Name” drop-down list.
2. Click the “Add Repository” button at the bottom of the screen.

3. The "Create Options" pop-up window is returned.
4. Use the "New Version" radio button in the "Create Options" pop-up window, and then click "Add Item" button.
5. The repository screen is refreshed for the repository selected. The "Version" field will be incremented. The new version number is also displayed in the Repository Name field, where the version number is appended to the repository name, for example "ESP - V1."
6. Other repository information can be changed. All required fields must be complete.
7. Once data entry has been completed, click on the "Save" button at the bottom of the screen.
8. The data will be saved and the screen refreshed, showing the new repository version entry.

- **Import**

Note: This option would typically be used when you have a file or can create a file with one or more repository entries.

1. In the "Create Options" box on the left of the screen, first select the "Import" radio button, and then click on the "Add Item" button in the window.
2. The Repository Upload screen is returned.
3. If you require a copy of the Repository Tables template, select "Repository Tables" in the "DataSpecs Component Type" drop-down box, and then click on the "Download Template" button. The File Download screen allows you to save the "Repository.xls" file or open it.
4. Load or enter the repository table information that you want to upload into the template rows. (Each repository table entry is entered as a separate row.) Save the EXCEL file. (NOTE: DataSpecs uses EXCEL 97-2003 Workbook file format for this purpose.)
5. Return to the DataSpecs Repository Upload screen.
6. Select "Repository Table" in the "DataSpecs Component Type" drop-down box.
7. Either browse to locate the name of the "File to Import," or enter the directory and file name information for the file you wish to load.
8. Click the "Validate and Import" button.
9. If there are errors in the Import file, Violations message(s) will be displayed. You can print the error message, or Print or Save the Violation spreadsheet.
10. Correct any errors in the file. Save the corrected file. Return to step 6.
11. When the DataSpecs message "No violation occurs, please click on upload" is returned, respond "OK" button on the message screen.
12. Click on the "Upload" button.
13. A "Success" screen is displayed with a count of the repository entries loaded.

Edit a Repository Entry

To edit repository information, use the following steps:

1. Choose the repository entry to be edited in the "Repository Name" drop-down list. (Click on the down arrow located on the right side of the "Repository Name" box to view the drop-down list.)
2. The window refreshes to present the information for the selected repository.
3. Modify the repository information as needed.
4. Save the updated repository information by clicking on the "Save" button at the bottom of the window.

You may also locate the Repository entry to be edited by using the Data Grid View and scrolling through the Repository names to locate a specific entry.

Remove a Repository Entry

To remove a repository:

April 2014

1. Choose the repository entry to be removed in the "Repository Name" drop-down list. The window will refresh to present data associated with the specified Repository.
2. When a Repository is selected, the button bar at the bottom of the screen includes an additional button labeled "Remove Repository." Click the "Remove Repository" button.



Figure 30 - Expanded Repository Info Button Bar

3. A pop-up window requires that you confirm the deletion.



Figure 31 - Deletion Confirmation Pop-up Window

4. Click "OK" to confirm the deletion.
5. The window will refresh to a blank Repository Info screen.

View Repository Data Grid

To see a listing of Repository Inventory entries, click on the "Data Grid View" button at the bottom of the screen. You can browse Repository entries, edit a Repository entry, remove a Repository entry, or download the Repository data. For further detail see "[Data Grid View](#)" section under General Features.

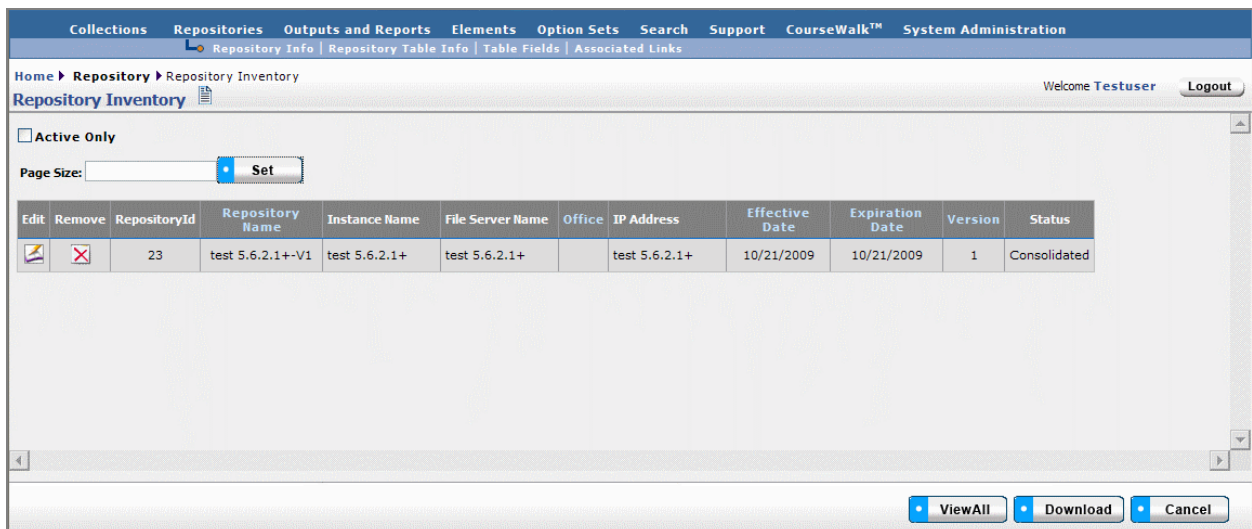


Figure 32 - Repository Data Grid View

April 2014

Generate Repository Details Report

To generate a Repository Details Report:

1. Select the Repository for the report in the "Repository Name" drop-down list.
2. Click the "Repository Details Report" button at the bottom of the screen.

The Repository Details Report lists information about repositories, detailing all the items shown in the web view. For further discussion regarding "Detail Report" see that section under General Features.

1 of 23
100%
Find | Next
Select a format
Export

Repository Details: DataSpecs

Database Name: DataSpecs	Repository Type:	Status: Active	Version: 1
Responsible Office:	Database Software: Access	Effective Date: 05/14/2008	File Server Name:
Contact:	Database Version: 2002-2003	Expiration date:	Server Address:
Phone:	Extension:		Instance Name:
Email:			
Description:			

Tables and Fields in Repository

Table: Repository	Update Schedule:	Privacy Restriction:	Effective Date: 05/14/2008	Expiration Date:
Field Name: status	Primary Key:	Required:	DataType:	
Min Value:	Max value:	Size:	OptionSet:	
Table: Table	Update Schedule:	Privacy Restriction:	Effective Date: 05/14/2008	Expiration Date:
Field Name: Table_id	Primary Key: 1	Required:	DataType:	
Min Value:	Max value:	Size:	OptionSet:	
Table: Element	Update Schedule:	Privacy Restriction:	Effective Date: 05/14/2008	Expiration Date:
Field Name: Element_id	Primary Key: 1	Required:	DataType:	

Figure 33 - Repository Details Report

Repositories → Repository Table Info

The Repository Tables screen supports documentation for the schemas and tables associated with each Repository.

The screen operation requires identification of the Repository at the upper left of the screen. When the Repository is selected, the Repository Tables functionality is enabled. When there are Repository Tables available for the selected Repository, the table names are listed in the "Repository Table" window on the left side of the screen.

The Repository Table information serves as the connection point between a Repository and fields in the repository.

Repository Table Screen Layout & Description

The following screen is returned when you select "Repository Table Info" on the second-tier navigation bar at the top of the screen.

Figure 34 - Repository Table Info (composite image)

The data groups on the screen include: Repository Name and Repository Table box, Basic Information, and History Tracking. Repository Tables associated with the Repository selected are listed in the window on the left side of the screen. When a Table entry is selected, the information about that table is displayed in the Basic Information and History Tracking areas.

DataSpecs supports the following information on a Repository Table:

Component Metadata – Repository Tables - Basic Information		
Screen Item	Definition	Optional(O)/ Required(R)
Schema Name	The name of the schema or user space where the table resides. (Note: Not all database management systems support schemas.)	O
Table Name	The free-form text name of the table within the database management system.	R
Status	The status of the repository table. Default option set includes: Active, Inactive, Consolidated, Retired, Review, and Revise. The "Status" option set can be updated through System Administration/System Tables. The same "Status" option set is shared with Collection Info, Repository Table Info, and Output Info.	O
Update Schedule	A free-form text description of when the data in this table are updated. This is a measure of the volatility of the data.	O
Privacy Restriction	A description of the general level of privacy restriction associated with the repository table. The default list of privacy restrictions include: All Fields, Some Fields, No Restrictions. The option set of privacy restriction entries can be updated through System Administration/System Tables.	O
Description	A free-form text description of the repository table contents and purpose.	O
Table Type	A characterization of the table: Operational, Archive, Development, Longitudinal, Look-up, etc. The choices for this list can be edited in System Administration/System Tables.	O

History Tracking		
Screen Item	Definition	Optional(O)/ Required(R)
Effective Date	The date that the table with the specific attributes will be (or was) effective.	R
Expiration Date	The date that the table with the specific attributes will be (or was) expired.	O
Version	The version of the repository table description.	R

Screen Functionality & Navigation – Repository Table Info

You can view and manage the information about Repository Tables using the Repository Table Info screen. The screen supports a set of actions for the selected Repository Table:

- Select "Active Only" Filter to View All Repositories or to View Only Active Repositories
- Add Repository Table entries
- Edit Repository Table entries

- Delete Repository Table entries
- Download Repository Table entries
- View Repository Table Data Grid

Select “Active Only” Filter to View All Repositories or to View Only Active Repositories

The “Active Only” check box controls whether all repository entries are shown or only the active repositories are listed in the Repository Name drop-down box. The default is to view active repositories only. When you need to look at a non-active repository, you uncheck “Active Only” and the window will refresh with a list of all repositories in the system.

A repository is active as long as its “Expiration Date” has not passed. Once the “Expiration Date” is reached, a repository is considered “Inactive”.

Entering and Editing Repository Table Entries

When entering information on a repository table, various fields may be edited by the following methods:

- Enter data directly into an editable field
- Select a predefined choice from the drop-down list
- Click on the checkbox or radio button
- Click on the Calendar icon to specify a date for a date field or type the date

The names of Repository Tables are displayed in the box to the top left of the screen. The screen component includes side and bottom scroll bars for you to scroll to view additional Repository Table entries.

Add a Repository Table

To add a repository table for a Repository, you will work through the steps for the method you choose.

The add method options include:

- New
- New Copy
- New Version
- Import

For Create Option:

- **New**
 1. Select the Repository for the new table within the “Repository Name” drop-down list.
 2. The screen will refresh to display the Repository Name and Repository Tables associated with the Repository (if any).
 3. Select the radio button for “New” within the “Create Options” box.
 4. Click on “Add New” button at the bottom of the “Create Options” box.
 5. The screen will refresh with empty fields.
 6. Enter the information on the New Repository Table.
 7. Click “Save” button at the bottom of the window.
 8. The new entry will be saved and the table name will be listed in the “Repository Table” box.
- **New Copy**

(The “New Copy” radio button is activated when a repository table is chosen.)

1. Pick the Repository for the new table from within the "Repository Name" drop-down list.
2. The screen will refresh to display the Repository Name and Repository Tables associated with the Repository (if any).
3. Select the Repository Table Name within the "Repository Table" box (on the left, above the "Create Options" box).
4. The screen will again refresh and display the information on the selected table.
5. Select the radio button for "New Copy" within the "Create Options" box.
6. Click on "Add New" button at the bottom of the "Create Options" box.
7. The "Edit Table Name" pop-up window will display for you to enter the name of the new table entry.

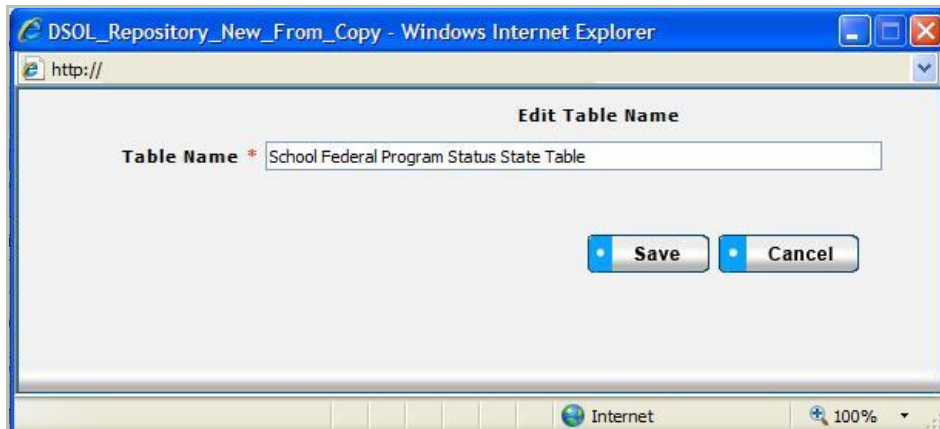


Figure 35 - Repository Table New Copy Pop-up Window

8. Enter the new table name in the Table Name box. Click on "Save" in the pop-up box.
9. The Repository Tables screen will refresh and display the copied entry from the selected table.
10. Enter or modify entry, as desired.
11. Click "Save" button at bottom of window.
12. The new entry will be saved and the new table name will be listed in the "Repository Table" box.

• New Version

(The "New Version" radio button is activated when a repository table is chosen.)

1. Pick the Repository for the new table from within the "Repository Name" drop-down list.
2. The screen will refresh to display the Repository Name and Repository Tables associated with the Repository (if any).
3. Select the Repository Table Name in the "Repository Table" box.
4. The screen will again refresh and display the information on the selected table.
5. Select the radio button for "New Version" within the "Create Options" box.
6. The Repository Tables screen will refresh and display the copied entry from the selected table. Effective Date will be today's date, and Version will be incremented by 1.
7. Edit or modify the table entry as needed.
8. Click "Save" button.
9. New Repository Table entry is saved, and the name of the table appears in the "Repository Table" list.

• Import

The Import functionality is useful to migrate or move a large volume of data into DataSpecs. Import is typically used when you have a file or can create a file with one or more repository entries.

1. At the Repository Tables screen, click "Import" radio button in the Create Options box on the lower left of the screen, and then, select "Add New".
2. The Repository Upload screen is returned.
3. If you require a copy of the Repository Table template, select "Repository Tables" in the "DataSpecs Component Type" drop-down box, and then click on the "Download Template" button. The File Download screen allows you to save the "RepositoryTable.xls" file or open it. (NOTE: DataSpecs uses EXCEL 97-2003 Workbook file format for this purpose.)
4. Enter or load the repository table data that you want to upload into the template rows. Each repository table entry is loaded as a separate row. And, save the EXCEL file with a unique file name.
5. Select "Repository Tables" in the "DataSpecs Component Type" drop-down box.
6. Either browse to locate the name of the "File to Import," or enter the directory and file name information for the file to be imported.
7. Click the "Validate and Import" button.
8. If there are errors in the Import file, Violations message(s) will be displayed. You can print the error message or Print or Save the Violation spreadsheet.
9. Correct any errors in the file. Save the corrected file. Return to step 6.
10. When the DataSpecs message "No violation occurs, please click on upload" is returned, respond "OK" button on the message screen.
11. Click on the "Upload" button.
12. A "Success" screen is displayed with a count of the repository records loaded.

Edit a Repository Table

To edit a repository table entry, use the following steps:

1. Select the "Repository Name" from the drop-down list on the upper right of the screen. Then select the "Repository Table" from those listed in the Repository Table box, just below the Repository Name. Scroll the "Repository Table" list as needed until you see the entry that you want to edit. Mouse over the entry and click. The screen will refresh to display data associated with the selected entry.
2. Modify the Table information, as needed.
3. Save the changes by clicking "Save" button at bottom of the window.

You may also locate the Repository Table to be edited, by using the Data Grid View, and scrolling through the Repository Table entries to locate a specific entry.

Delete a Repository Table

To remove a repository table, do the following:

1. Select the "Repository Name" from the drop-down list on the upper right of the screen. Then select the "Repository Table" in the Repository Table box. Scroll the "Repository Table" list as needed until you see the entry that you want to delete. Mouse over the entry and click. The screen will refresh to display data associated with the selected entry.
2. When the Repository Table is selected, the button bar at the bottom of the screen includes the "Remove Table" button. Click the "Remove Table" button.

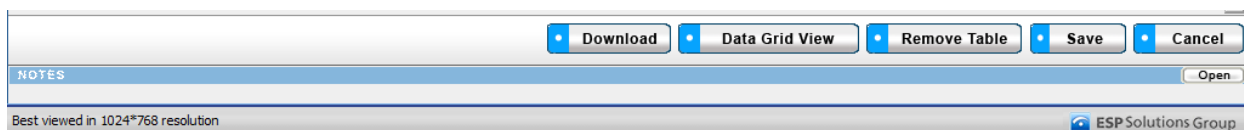


Figure 36 - Expanded Repository Table Info Button Bar

3. A pop-up window requires verification of the delete. Click "OK" to confirm the deletion.

April 2014

- The window will refresh to a blank Repository Tables screen on completion of the deletion.

Download Repository Table Entries

To download Repository Table entries, select the Data Grid View.

- Select the table entries that you want to download.
- At the bottom of the "Table Inventory" screen, click the "Download" button.
- DataSpecs returns a File Download pop-up window where you can "Open" the file, "Save" the file, or "Cancel" the download.
- Select "Save." Direct the download table to your chosen directory, and edit the download table name. Then save the table.

View Repository Table Data Grid

You can work with the grid view of the Repository Table Inventory by clicking on the "Data Grid View" button. Via this interface the user can Edit an Item, Remove an Item or Download the data for use as shown below. For further detail see "[Data Grid View](#)" section under General Features.

Edit	Remove	TableID	Repository Name	Table Name	Status	Table Type	Schema Name	Update Schedule	Effective Date	Expiration Date	Version
		476	User's Guide Repository	User's Guide Repository 2-V1	Active	Archive		Monthly	11/12/2009		1
		475	User's Guide Repository	User's Guide Repository-V1	Active	Archive	National	Monthly	11/12/2009		1

Figure 37 - Repository Table Data Grid View

Repositories → Table Fields

The Repository Table Fields screens provide functionality to capture and manage the information on each field associated with Repository schemas/tables. Each Table Field may include a field definition and characteristics (data type, format, default values, and a formula). Each Repository Table Field may be linked to a Dictionary Element and/or to an Option Set.

Begin use of the screen by selecting the Repository Name and Repository Table for the Table Fields at the upper left of the screen. The Table Fields functionality is enabled when those two selections are completed. When the selected Repository Tables already include Table Field entries, the Field Name entries are listed in the "Field Name" window on the lower left side of the screen.

After the Repository Table Field is created, the field may be linked to a Collection Item by using Collection Item->Map to Repository functionality. Also, the field may be linked to an Output Item by using Output Item->Map to Repository functionality.

Repository Table Fields Screen Layout & Description

When you select "Table Fields" on the second-tier navigation bar at the top of the screen, the following screen is returned.

Figure 38 - Repository Table Field (composite image)

The following screen items are available for a Repository Table Field entry:

Component Metadata – Repository -> Table Field		
Screen Item	Definition	Optional(O)/Required(R)
Repository Name	The name of the Repository to which the Table and Field are associated. The Repository Name is selected from a drop-down list.	R
Repository Table	The name of the Table to which the Field is associated. The Repository Table is selected from a drop-down list.	R
Note: Num and Field Name information are not displayed until Field Basic information is entered or loaded.		
Num	The sequence number (Order) associated with a Field Name in the particular Repository Table. (Field Names are displayed in the Field Name box in sequence number order.)	
Field Name	The Field Name associated with the sequence number displayed to the left.	

Component Metadata – Repository -> Table Field – Basic Information		
Screen Item	Definition	Optional(O)/Required(R)
Order	The sequence entry to control the order in which the fields are displayed in the table. "Order" field is displayed under heading "Num" with "Field Name".	O
Primary Key Order	If the field is part of the primary key for the table, then the position it appears in is a composite key. If the field is the sole component of the primary key then this field should be 1.	O
Field Name *	The name of the field as it should appear in the table. The Table Field Name format should follow the conventions for field names in use at your site. (These naming conventions are sometimes associated with specific database software.)	R
Authoritative Source	A checkbox to indicate whether this field should be considered the "authoritative source" of the content for use in analysis or reporting. (NOTE: Data often move from field to field and from repository to repository as they are processed and cleaned. The final resting place is the authoritative source.)	O
Definition	A free text field for the definition of the item.	O
Required	A checkbox to indicate whether the field may be NULL or must have some value or setting.	O
Target Audience	The group of persons who are the expected primary users of the data or data grouping (Collection, Repository, etc.). The selection is made from a drop-down list. The drop-down option list for this item may be modified in the System Options table.	O



Component Metadata – Repository -> Table Field – Field Characteristics		
Screen Item	Definition	Optional(O)/Required(R)
Data Type	The data type of the field: Binary/BLOB, Boolean, Date/Time, Memo, Number Discrete, Number Continuous, or Text. The choices for this list can be edited in the table System Options table.	O
Format	The format in which the field should be entered or displayed.	O
Data Length	The size of the field.	O
Min Value	The minimum value allowed for the field.	O
Max Value	The maximum value allowed for the field.	O
Precision	When the Repository Table Field is a numeric field, this entry is the maximum number of decimal places that will be captured.	O
Default Value	The default value of the field if there is one.	O
Formula	The formula used to derive the field if it is a calculated field.	O
Element	The unique Element to which the field is mapped.	O
Option Set	The Option Set which contains the list of valid values for the field.	O
Component Metadata – Repository Tables - History Tracking		
Screen Item	Definition	Optional(O)/Required(R)
Effective Date	The date that the table field with the specific attributes will be (or was) effective.	R
Expiration Date	The date that the table field with the specific attributes will be (or was) expired.	O
Version	The version of the repository table field description.	R

Screen Functionality & Navigation – Repositories -> Table Field

The “Table Fields” screen provides you with the functionality to view and manage the information on Table Fields for each repository table. The screen supports actions to:

- Select “Active Only” Filter to View All Repository Table Fields or to View Only Active Repository Table Fields
- Add Repository Table Field entries
- Edit Repository Table Field entries
- Delete Repository Table Field entries
- Download Repository Table Field entries
- View Repository Table Field Data Grid

Select “Active Only” Filter to View All Repositories/Tables/Fields or to View Only Active Repositories/Tables/Fields

The “Active Only” check box controls whether all entries for Repositories, Repository Tables, and Table Fields are shown or only the active entries are listed in the drop-down boxes on this screen. The default is

to view active entries only. When you need to look at a non-active (expired or future) entry, you uncheck "Active Only" and the window will refresh with drop-down lists of all entries in the system.

An entry is active as long as its "Expiration Date" has not passed. Once the "Expiration Date" is reached, a repository is considered "Inactive".

Add a Repository Table Field

To add a Table Field, you will work through the steps listed for the method you choose.

Select the creation mode by clicking the radio button next to the "Create Options" box on the lower left side of the screen. The options provided include:

- New,
- Import,
- Add From Element,
- New Version, and
- New From Copy.

For Create Option:

- **New**

1. Select the "Repository Name" and the "Repository Table" from the drop-down lists in the upper left of the screen.
2. The screen will refresh and display table fields (if any) which are already associated with the Repository and Repository Table.
3. In the "Create Options" box at the lower left of the screen, click the entry "New" and then select "Add New" button at the bottom of the box.
4. Enter the metadata associated with the new field.
5. Click "Save" button at the bottom of the window.
6. The new Table Field entry will be saved and the table field name will be listed in the "Field Name" box.

- **New From Copy**

(The "New From Copy" radio button is activated when a Table Field is selected.)

1. Select the "Repository Name" and the "Repository Table" from the drop-down lists in the upper left of the screen.
2. The screen will refresh and display table fields (if any) which are already associated with the Repository and Repository Table.
3. "Mouse over" and click on the Field Name entry in the Field Name box (in center left of screen) for the Field entry to be copied.
4. The screen refreshes and displays the metadata associated with the entry to be copied.
5. In the "Create Options" box, at the lower left of the screen, click the radio button entry for "New from Copy" and then select "Add New" button at the bottom of the "Create Options" box.
6. The "Edit Field Name" pop-up window will display. Enter the name of the new Field Name entry, and click "Save" in the pop-up window.



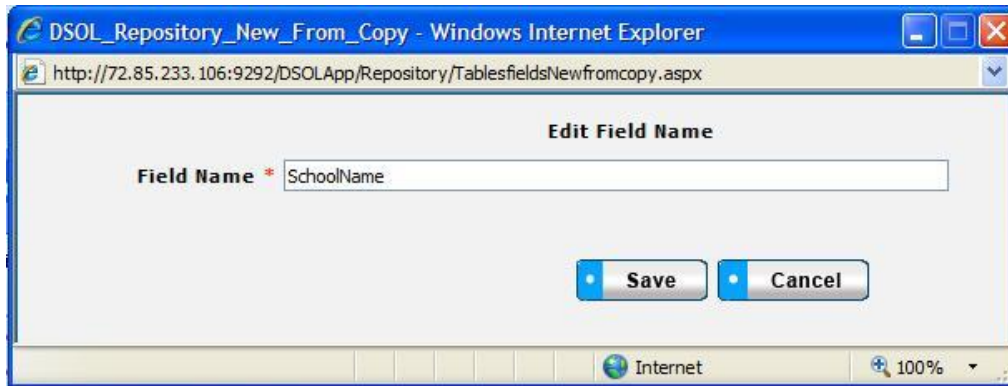


Figure 39 - Repository Field New From Copy Pop-up Window

7. The screen will refresh and display the copied data with the new field name.
8. Enter and modify the metadata associated with the new field.
9. Click "Save" button at the bottom of the window.
10. The new Table Field entry will be saved and the table field name will be listed in the "Field Name" box.

• New Version

(The "New Version" radio button is activated when a Table Field is selected.)

1. Select the "Repository Name" and the "Repository Table" from the drop-down lists in the upper left of the screen.
2. The screen will refresh and display table fields (if any) which are already associated with the Repository and Repository Table.
3. "Mouse over" and click on the Field Name entry in the Field Name box (in center left of screen) for the Field entry to be copied.
4. Select the radio button for "New Version," and then click "Add New" button within the "Create Options" box.
5. The Repository Table Fields screen will refresh and display the copied entry from the selected table. Effective Date will be today's date, and Version will be incremented by 1.
6. Edit or modify the table field entry as needed.
7. Click "Save" button.
8. New Repository Table Field entry is saved, and the name of the Repository Field appears in the "Repository Table" list, with the new version number.

• Add From Element

Note: This function requires that the Element to be copied must be loaded in the DataSpecs dictionary. See "Element" section for details.

1. Select the "Repository Name" and the "Repository Table" from the drop-down lists in the upper left of the screen.
2. The screen will refresh and display the blank Table Field screen, with a list of table fields (if any) which are already associated with the Repository and Repository Table.
3. Select the radio button for "Add From Element," and then click "Add New" button within the "Create Options" box.
4. A pop-up window is returned with a listing of current Elements.

5. Scroll to the Element Name. When the appropriate Element Name is highlighted, click the "Add" button at the bottom of the pop-up window. NOTE: You can also type the first character of the Element Name to position to the elements starting with that character.
6. The screen will refresh and display a Repository Field screen with the field characteristics entries copied from the Element entry, but no entries in the Basic Information area.
7. Enter the required fields and edit or modify other Repository Field information.
8. When finished, click the "Save" button at the bottom of the screen.
9. New Repository Table Field entry is saved, and the name of the Repository Field appears in the "Repository Table" list with the new version number.

- **Import**

The Import functionality is useful to migrate or move a large volume of data into DataSpecs. Import is typically used when you have a file or can create a file with one or more repository table field entries.

1. At the Repository Table Fields screen, click "Import" radio button in the Create Options box on the lower left of the screen, and then select "Add New".
2. The Repository Upload screen is returned.
3. If you require a copy of the Repository Table template, select "Repository Tables" in the "DataSpecs Component Type" drop-down box and then click on the "Download Template" button. The File Download screen allows you to save the "RepositoryTable.xls" file or open it. (NOTE: DataSpecs uses EXCEL 97-2003 Workbook file format for this purpose.)
4. Enter or load the repository table data that you want to upload into the template rows. Each repository table entry is loaded as a separate row. Save the EXCEL file with a unique file name.
5. Select "Repository Tables" in the "DataSpecs Component Type" drop-down box.
6. Either browse to locate the name of the "File to Import" or enter the directory and file name information for the file to be imported.
7. Click the "Validate and Import" button.
8. If there are errors in the Import file, Violations message(s) will be displayed. You can print the error message or Print or Save the Violation spreadsheet.
9. Correct any errors in the file. Save the corrected file. Return to step 6.
10. When the DataSpecs message "No violation occurs, please click on upload" is returned, respond "OK" button on the message screen.
11. Click on the "Upload" button.
12. A "Success" screen is displayed with a count of the repository records loaded.

Edit Table Fields

To edit a table field, you will:

1. Select the "Repository Name" and the "Repository Table" from the drop-down lists in the upper left of the screen.
2. The screen will refresh and display table fields (if any) which are already associated with the Repository and Repository Table.
3. Select the Field entry in the Field Name box (in center left of screen) for the Field entry to be copied. ("Mouse over" the field names to the one you want to edit, and click on the entry to select it.)
4. The Repository Table Fields screen will refresh and display the Table Field entry.
5. Edit or modify the table field entry as needed.
6. Click "Save" button.
7. New Repository Table Field entry is saved, and the name of the Repository Field appears in the "Repository Table" list with the edits you entered.

Remove a Table Field

To remove a table field, you will:

1. Select the "Repository Name" and the "Repository Table" from the drop-down lists in the upper left of the screen.
2. The screen will refresh and display table fields (if any) which are already associated with the Repository and Repository Table.
3. Select the Field entry in the Field Name box (in center left of screen) for the Field entry to be copied. ("Mouse over" the field names to the one you want to edit, and click on the entry to select it.)
4. The Repository Table Fields screen will refresh and display the selected Table Field entry, and the "Remove Field" button will be included at the bottom of the screen.



Figure 40 - Repository Fields Delete Button Bar

5. Click the "Remove Field" button. A pop-up window is presented asking for you to verify that you want to delete the field.



Figure 41 - Repository Fields Delete Pop-up

6. Respond "OK" to complete the deletion.
7. The record is deleted, and the Repository Fields window refreshes.

View Table Field Data Grid

For a "grid" view of the Repository Table Fields, click on the "Data Grid View" button at the bottom of the Repositories Fields window. You can select a Repository Field to view or edit. You can delete a Repository Field. And, you can also download Repository Fields information for other uses. For further detail see "[Data Grid View](#)" section in the General Features section.

Edit	Remove	TableField ID	Repository Name	Table Name	FieldName	Element	Option	Effective Date	Expiration Date	Version	Min Value	Max Value	Default Value	Data Format	Item Formula
		2350	DataSpecs	Collection	Abstract-V1			5/14/2008		1					
		2495	Carl D. Perkins	Concentrator_Summary	acad_disadvantaged-V1			5/14/2008		1					
		2487	Carl D. Perkins	Concentrator_Summary	asian_concentrators-V1			5/14/2008		1					
		2355	DataSpecs	Collection	Associated_link_description-V1			5/14/2008		1					
		2354	DataSpecs	Collection	Associated_link_name-V1			5/14/2008		1					
		2356	DataSpecs	Collection	Associated_link_URL-V1			5/14/2008		1					

Figure 42 - Repository Fields Data Grid View

Repositories → Associated Links

The Associated Links functionality supports documenting hyperlinks to Repository materials, which might include repository documentation, information relating to repository uses, and other related websites.

Repositories Associated Links Screen Layout & Description

The Associated Links screen, shown below, is returned when the “Associated Links” option is selected on the second-tier navigation bar at the top of the screen.

Figure 43 - Repositories Associated Links Screen

The areas on the screen include: Repository Name and Associated Links, and the Associated Link Information grouping.

Component Metadata – Collections – Associated Links		
Screen Item	Definition	Optional(O)/Required(R)
Repository Name *	A user-defined unique name or title that represents a repository.	R
Associated Links	The list of selectable Associated Links which have been associated with the chosen collection. Link entries are shown in this box (on the upper left of the screen) when the entry is “added.”	
Description	A narrative description of the contents of the repository associated links entry.	O
Associated Link Info		
Screen Item	Definition	Optional(O)/Required(R)
Associated Link	The user-defined name of the Associated Link related to the Link URL.	R
Link Description	The free-form text description of the Associated Link.	O
Link URL	The hyperlink URL (uniform resource locator) specifying where the Associated Link is available.	R

Notes	The free-form text notes about the Associated Link.	O
-------	---	---

Screen Functionality & Navigation – Associated Links

The Associated Links screen supports the following actions:

- Select “Active Only” filter to list all Associated Links related to the chosen Repository Name or to list only active Associated Links
- Add an Associated Link
- Import Associated Link(s) entries
- Edit an Associated Link
- Delete an Associated Link
- View Associated Links Data Grid

Select “Active Only” Filter to View All Associated Links or to View Only Active Associated Links

The “Active Only” check box controls whether all entries for the Associated Links are shown or only the active entries are listed in the drop-down boxes on this screen. The default is to view active entries only. When you need to look at a non-active (expired or future) entry, you uncheck “Active Only” and the window will refresh with drop-down lists of all entries in the system.

An entry is active as long as its “Expiration Date” has not passed. Once the “Expiration Date” is reached, a repository is considered “Inactive.”

Add an Associated Link

To add an Associated Link, complete the following steps:

1. Select the “Repository Name” in the drop-down list in the upper left of the screen.
2. The screen will refresh and display Associated Links (if any) which are already associated with the chosen Repository.
3. Click the “Add” button at the bottom of the screen. The screen will refresh with blank fields in the Associated Link Info area.
4. Enter the metadata associated with the new link entry.
5. Click “Save” button at the bottom of the window.
6. The new Associated Link entry will be saved and the link name will be listed in the “Associated Links” box in the upper left of the screen.

Import Associated Links

The Import functionality is useful to migrate or move a large volume of data into DataSpecs. Import is typically used when you have a file or can create a file with one or more Associated Link entries.

1. At the Associated Links screen, click the “Import” button on the bottom bar.
2. The Repository Upload screen is returned.
3. Select “Associated Links” in the DataSpecs Component Type drop-down box.
4. If you require a copy of the Repository Associated Links template, click the “Download Template” button. The File Download screen allows you to save the “CollectionAssociatedLinks.xls” file or open it. (NOTE: DataSpecs uses EXCEL 97-2003 Workbook file format for this purpose.)
5. Enter or load the Repositories Associated Links data that you want to upload into the template rows. Each repository table entry is loaded as a separate row. Save the EXCEL file with a unique file name.
6. Select “Associated Links” in the “DataSpecs Component Type” drop-down box.

7. Either browse to locate the name of the "File to Import" or enter the directory and file name information for the file to be imported.
8. Click the "Validate and Import" button.
9. If there are errors in the Import file, Violations message(s) will be displayed. Print or Save the Violation spreadsheet.
10. Correct any errors in the file. Save the corrected file. Return to step 6.
11. When the DataSpecs message "No violation occurs, please click on upload" is returned, respond "OK" button on the message screen.
12. Click on the "Upload" button.
13. A "Success" screen is displayed with a count of the Associated Links entries loaded.

Edit an Associated Link Entry

To edit an Associated Link entry:

1. Select the "Repository Name" in the drop-down list in the upper left of the screen.
2. The screen will refresh and display Associated Links (if any) which are already associated with the chosen Repository.
3. Select the Associated Link entry that you wish to edit from those listed in the "Associated Links" window. (Mouse over the entries and click.) The screen will refresh and display the information for the Associated Link.
4. Make the necessary modifications for the entry.
5. Click "Save" button at the bottom of the window.
6. The updated Associated Link entry will be saved.

Delete an Associated Link Entry

To remove an Associated Link entry, you will:

1. Select the "Repository Name" in the drop-down list in the upper left of the screen.
2. The screen will refresh and display Associated Links (if any) which are already associated with the chosen Repository.
3. Select the Associated Link entry that you wish to edit from those listed in the "Associated Links" window. (Mouse over the entries and click.) The screen will refresh and display the information for the Associated Link and the "Remove" button will be included at the bottom of the screen.



Figure 44 - Repositories Associated Links Delete Button Bar

4. Click the "Remove Field" button. A pop-up window is presented asking for you to verify that you want to delete the field.



Figure 45 - Repositories Associated Link Delete Pop-up

5. Respond "OK" to complete the deletion.
6. The record is deleted, and the Repository Fields window refreshes.

View Repository Associated Links Data Grid

For a “grid” view of the Repository Associated Links, click on the “Data Grid View” button at the bottom of the window. You can select a specific Associated Link entry to view or edit. You can delete an Associated Link entry. And, you can also download Associated Links information for other uses. For further detail see “[Data Grid View](#)” section in the General Features section.

Repositories→Map Repository Field to Repository Field

The Map Repository Field to Repository Field screen documents the relationships between Target Fields and Source Fields.

A Target Repository, Target Repository Table, and Target Repository Field can be mapped to a Source Repository, Source Repository Table, and Source Repository Field in order to connect a relationship between two repositories.

NOTE: Before you proceed with mapping, the “target” Repository, Repository Table, and Repository Field and the “source” Repository, Repository Table, and Repository Field must be entered (loaded) into DataSpecs.

The Map Repository Field to Repository Field Screen provides the functions to:

- Map (Link) a Target Repository, Repository Table, and Repository Field to a Source Repository, Repository Table, and Repository Field
- Un-map (remove a link) a Target Repository, Repository Table, and Repository Field to a Source Repository, Repository Table, and Repository Field
- View source(s) mapped to a target Repository, Repository Table, and Repository Table Field
- Generate a Repository to Repository Mapping Detail Report

Screen Layout & Description

The Map Repository Field to Repository Field screen, shown below, is returned when the “Map Repository Field to Repository Field” option is selected on the second-tier navigation bar at the top of the screen.

Figure 46–Map Repository Field to Repository Field Screen

The groupings of data on the Map Repository Field to Repository Field screen includes:

- Target Repository Name
- Target Repository Table Name
- Target Repository Table Field Name
- Target Repository Table Field Description
- Target Repository Table Field Formula
- Source Repository Name
- Source Repository Table Name
- Source Repository Table Field Name
- Source Repository Table Field Description

Definitions for items that reference the Repository Name, Table Name, Field Name, Field Description, and Field Formula are located at the beginning of the Repository Section of the User's Guide.

Screen Functionality & Navigation – Map Repository Field to Repository Field

You can view and manage information regarding the Repository Field to Repository Field mapping. The screen supports actions to:

- Select “Active Only” Filter to View All Target and/or Source Repository Table Fields or to View Only Active Target and/or Repository Table Fields,
- Select a specific Target Repository, Repository Table, and Repository Field
- Map (link) a Target Repository Field to a Source Repository Field,
- Un-map (remove the link between) a Target Repository Field to a Source Repository Field,
- View mappings to a specified Target Repository, Table, and Field, and
- Generate a Repository to Repository Mapping Detail Report.

Select “Active Only” Filter to View All Target and/or Source Repository Table Fields or to View Only Active Target and/or Repository Table Fields

The “Active Only” check box controls whether all target and/or source repositories are shown or only the active target and/or source repositories are listed in the Repository Name drop-down boxes. This feature is available for both the Target Repository section and the Source Repository section. Unlike other screens, the default in the Map Repository Field to Repository Field is to view non-active repositories which include all repositories in the system. When you need to look at active repositories, you check “Active Only” and the window will refresh with a list only active repositories.

A repository is considered “active” as long as its “Expiration Date” has not passed. Once the “Expiration Date” is reached, a repository is considered “Inactive.”

Map a Target Repository Field to a Source Repository Field

To Map a Target Repository Field to a Source Repository Field, you:

1. Select the Target Repository, Repository Table, and Repository Table Field you wish to have a mapping(s) by using the drop-down boxes in the Target Section at the top of the screen.
2. The screen will refresh with each selection. When the Target Repository Table Field Name is selected, the Target Field description and formula is displayed.
3. Select the Source Repository Table Field you wish to map to the Target Repository Table Field by selecting the Source Repository and Table with the drop-down boxes in the lower left Source Section, then click on the desired Field.
4. Click the “Map” button between the source selection section and the source listing section.

Un-map a Target Repository Table Field and a Source Repository Table Field

To Un-map (remove the links between) a Target Repository Field and a Source Repository Field, you:

5. Select the Target Repository, Table, and Table Field by using the drop-down boxes in the Target Section.
6. The screen will refresh with each selection. When the Target Repository Table Field Name is selected, the Target Field description and formula is displayed.
7. Select the Source Repository Table Field you wish to Un-map by clicking on it in the lower right section.
8. Click the “Un-map” button between the source selection section and the source listing section.

View Map Repository Field to Repository Field Data Grid

To view the data grid of the Map to Repository entry or entries, the following steps can be used.

6. Select the Target Repository Name, Table, and Field for the desired mappings to be displayed in the Data Grid view. If you would like to see all mappings, do not select a Target Repository Table Field and skip to step 2.
7. Click on the “Data Grid View” button at the bottom of the screen. The “Map to Repository Grid” screen displays the Source Repository Fields which have been mapped to the selected Target Repository.
8. Use scroll bars on the right and at the bottom of the table to view all columns and rows.
9. Repository to Repository mappings can be edited or removed, using EDIT or REMOVE buttons available on each entry.
10. For additional detail, see the “Data Grid View” section under General Features.

Outputs and Reports

Outputs and Reports Functionality

DataSpecs provides the functionality to document Outputs and Reports from the Data Inventory using the following steps:

1. Load selected **Outputs/Reports** and **Output/Report Items**.
2. Relate Output/Report Items to available Data Dictionary Elements, and add Element entries as needed.
3. Relate Output/Report Items to available Option Sets, adding Option Sets and Options as needed. *AND*,
4. Relate (Map) Output/Report Items to Repository Fields.
5. Enter information on the Associated Links to Internet resources on documentation, rules, submission sites, etc. for Collections, Repositories, and Outputs/Reports.

You can access the Outputs and Reports functionality through the second-level navigation bar at the top of the DataSpecs screen. The navigation bar components for Outputs/Reports include:

- Output Info
- Output Item
- Output Item - Map to Repository
- Associated Links

The components support the entry, import (upload), download, and reporting of the data inventory entries for Outputs and Reports

Outputs and Reports→Output Info

Output Info supports documentation about the high-level information about Outputs and Reports. The screen provides functionalities to:

- Add a single output/report entry
- Upload Output info for one or more Outputs/Reports
- Update or Edit an Output/Report entry
- Remove an Output/Report
- View a specific Output/Report entry
- View a set of Output/Report entries
- Generate an Output Details Report

Output Info Screen Layout & Description

The following screen is returned when you select “Outputs and Reports” on the top-tier DataSpecs menu bar and “Output Info” on the second-tier menu bar.

Figure 46 - Output Info screen (composite image)

The groupings of data on the Output Info screen include: Basic Information, Ownership, Report Characteristics, Available Documentation, and History Tracking. The fields within these components are defined in the tables that follow, and each field is identified as either Required or Optional.

Component Metadata – Outputs and Reports – Basic Information		
Field	Definition	Optional(O)/Required(R)
Active Only	A check indicates that the data presented on the screen is filtered to show only current entries. Expired entries (entries where the “expiration date” has passed) remain in the database, but are not displayed within the drop-down list or the Data Grid view.	
Name (Output or Report Name)	A unique name or title that represents a defined output/report.	R
Report Number	A unique number assigned to represent a specific output/report.	O

	The unique number is associated with the unique name for an output/report.	
Report Set	A user-defined grouping of outputs/reports.	O
Status	The status of the output/report: Active, Being Revised, Consolidated, Inactive, Retired, or Under Review.	O
Target Audience	The group of persons who are the expected primary users of the output/report. The selection is made from a drop-down list. The drop-down option list for this item may be modified in the System Options table.	O

Component Metadata – Outputs and Reports – Ownership		
Field	Definition	Optional(O)/ Required(R)
Office	The office responsible for the particular Output/Report. The selection is from a drop-down list of Offices. This field is not editable from the Output Info screen. Use the “Support ->Offices” screen to enter or to correct the name of the office.	O
Abstract	A short free-form description of the output/report.	O
Steward	The person responsible for the output/report or the contact person for the output/report. The selection is made through a pop-up box. This field is not editable from the Output Info screen. Use the “Support ->People” screen to enter or to correct the steward (contact) name.	O
Mandate	A description of the source of requirements for the output/report. “Mandates” might include a legislative act, a section of law, administrative code or procedure, or local policy.	O
Phone	The phone number associated with the steward (contact) for the output/report. This field is not editable from the Output Info screen. Use the “Support ->People” screen to enter or to correct the phone number.	O
Extension	The extension (if any) associated with the “Phone” for the steward (contact). This field is not editable from Output Info screen. Use the “Support ->People” screen to enter or to correct the phone number.	O
Email	The email address associated with the steward or contact for the Output/Report. This field is not editable from Output/Report screen. Use the “Support ->People” screen to enter or to correct the phone number.	O

Component Metadata – Outputs and Reports – Report Characteristics		
Field	Definition	Optional(O)/ Required(R)



Media	The media through which the output/report is available. Examples of media might include: paper, PDF, Excel file, etc. The option list for this list may be edited in the "System Options" table.	O
Format	A free-form text description of the output/report format.	O
Detail Level	The lowest level of detail at which the data are provided as outputs/reports. Examples include: County, Course, District, Individual, Other, Program, Region, School, or State. The option list for this entry can be edited in the table System Options table.	O

Component Metadata – Outputs and Reports – Periodicity

Field	Definition	Optional(O)/ Required(R)
Privacy Restriction	Indicates whether the output/report should be protected for reasons of privacy/confidentiality. Restriction options include: "Cell size dependent," "Individual Data – Restricted," and "No Restrictions." The options for this list can be edited in the "System Options" table.	O
Month Reported	The month or months when the output/report is expected to be completed or available. The entry includes a check box for each month.	O

Component Metadata – Outputs and Reports - Available Documentation

Field	Definition	Optional(O)/ Required(R)
Administration Manual	Check box that output/report documentation is available in an Administration Manual.	O
Change Implications	Check box that output/report documentation is available in a Change document.	O
Item List	Check box that output/report documentation is available in an Item List.	O
Storage Location	Check box that output/report documentation is available in a storage location, e.g. at a web site URL or in a directory.	O
Item Dictionary	Check box that output/report documentation is available in a data dictionary.	O
Other Documentation	Check box that output/report documentation is included in other materials.	O
Quality Criteria	Check box that output/report documentation is included in quality criteria.	O



Component Metadata – Outputs and Reports – History Tracking		
Field	Definition	Optional(O)/Required(R)
Effective Date	The beginning date that the output/report was (or will be) effective.	R
Expiration Date	The date that the output/report was (or will be) expired.	O
Version	The version of the output/report description.	R

Screen Functionality & Navigation – Output Info

The “Outputs and Reports” Info form provides the following actions:

- Select “Active Only” filter to list all Output Info entries in the Name drop-down list or to list only active entries
- Add an Output Info entry
- Upload Output Info entries
- Edit an Output Info entry
- Remove an Output Info entry
- View a specific Output Info entry
- View a set of Output Info entries
- Generate an Output Details Report

Note: All required fields must have data assigned for the “Save” to occur. The required fields are denoted by an asterisk at the end of the field name.

“Active Only” Filter to View All Output Info Entries or to View Only Active Outputs

The “Active Only” check box controls whether all Output Info entries are shown or only the active ones are listed in the Name drop-down box. The default is to view only the active Output Info entries.

An Output Info entry is active as long as its “Expiration Date” has not passed. Once the “Expiration Date” is reached, it is considered to be “Inactive”.

Entering and Editing Output Info Data

When entering Output Info data, various fields may be edited by the following methods:

- Enter data directly into an editable field.
- Select a predefined choice from the drop-down list.
- Click on the checkbox or radio button.
- Click on the Calendar icon to specify a date for a date field or type the date.

The fields “Responsible Office” and “Contacts” may either be selected from the list of “People” or “Offices” or they may be new entries that are added to “People” or “Offices” lists. Information in both fields may be managed directly using SUPPORT->Offices or SUPPORT->People.

Add Output Info Entry

To create/add a new Output Info entity, click on the “New” link (next to the Name box) or use the “Add Output” button at the bottom of the screen.

The screen will refresh to allow for data entry to create a new entry.

When you click on the “Add Output” button, the “Create Options” screen will be returned. This screen provides selection of a Create Option for a new Output Info entry, including:

- Add New
- New from Copy
- New Version
- Import

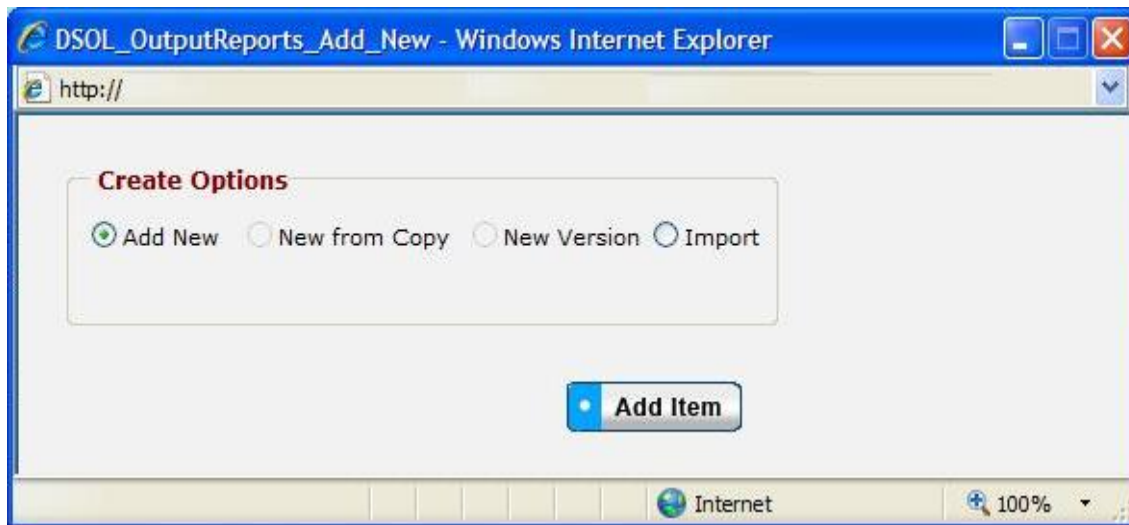


Figure 47 - Output Info Create Options Pop-up Window

“Add New,” “New Copy,” and “New Version” selections each support entering or creating a single Output Info entry. The “Import” selection supports loading one or more Output Info entries.

- **Add New**

1. Click on “New” link or use the “Add Output” button specifying “Add New” from the Create Options pop-up window.
2. Enter the required fields – Output Name, Effective Date, and Version. “Version” will have the default value of 1.
3. Enter other fields, as desired.
4. When the entry is complete, click on the “Save” button at the bottom of the Outputs and Reports screen to store the Output Info entry.

- **New Copy**

(The “New Copy” radio button is activated when a repository is chosen.)

Note: You can use New Copy when an existing Output Info entry has minor changes from the other Output Info, like a different detail level, different report dates, or different audiences.

1. Select the Output Info entry that you want to copy from the “Name” drop-down list.
2. Click the “Add Output” button at the bottom of the screen.
3. The “Create Options” pop-up window is returned.
4. Use the “New Copy” radio button in the “Create Options” pop-up window, and then click “Add Item” button.

5. Enter the new Output Name, and update other information, as appropriate.
6. Click on the "Save" button at the bottom of the screen to store the new Output Info entry.
7. The Output Info entry will be saved and the screen refreshed.

- **New Version**

(The "New Version" radio button is activated when a repository is chosen.)

Note: This option would typically be used when an existing Output Info entry has minor modifications. A new version would typically supersede the older version. Entries are unique when effective date and/or version number are different. Versioning helps to maintain information on current outputs/reports and their attributes, as well as past and future outputs/reports.

1. Select the Output Info entry that you want to copy in the "Name" drop-down list.
2. Click the "Add Output" button at the bottom of the screen.
3. The "Create Options" pop-up window is returned.
4. Use the "New Version" radio button in the "Create Options" pop-up window, and then click "Add Item" button.
5. The Output Info screen is refreshed showing the selected entry. The "Version" field is incremented. The new version number is also displayed in the Repository Name field where the version number is appended to the repository name (for example "ESP – V2").
6. Other Output Info can be changed. All required fields must be complete.
7. When changes are completed, click on the "Save" button at the bottom of the screen.
8. The data will be saved and the screen refreshed showing the new Output Info version entry.

- **Import**

This option would typically be used to migrate or move a large quantity of data from an existing environment into DataSpecs. This option requires that you have a file or create a file with one or more Output Info entries.

1. In the "Create Options" box on the left of the screen, first select the "Import" radio button, and then click on the "Add Item" button in the window.
2. The Output Upload screen is returned.



Figure 48 - Output Upload Import Screen

3. If you require a copy of the Output Info template, select "Output and Reports" in the "DataSpecs Component Type" drop-down box, and then click on the "Download Template" button. The File Download screen allows you to save the "StateOutputsAndReports.xls" file or to open it. (NOTE: DataSpecs uses EXCEL 97-2003 Workbook file format for this purpose.)
4. Load or enter the information that you want to load into DataSpecs in the template rows. (Each Output Info entry is entered as a separate row.) Save the EXCEL file with a unique filename.
5. Return to the DataSpecs Output Upload screen.
6. Select "Output and Reports" in the "DataSpecs Component Type" drop-down box.
7. Either browse to locate the name of the "File to Import" or enter the directory and file name information for the file to be loaded.
8. Click the "Upload and Validate" button.
9. If there are errors in the Import file, Violations message(s) will be displayed. You can print the error message or Print or Save the Violation spreadsheet.
10. Correct any errors in the file. Save the corrected file. Return to step 6.
11. When the DataSpecs message "No violation occurs, please click on upload" is returned, respond "OK" button on the message screen.
12. Click on the "Upload" button.
13. A "Success" screen is displayed with a count of the Output Info entries that were loaded.

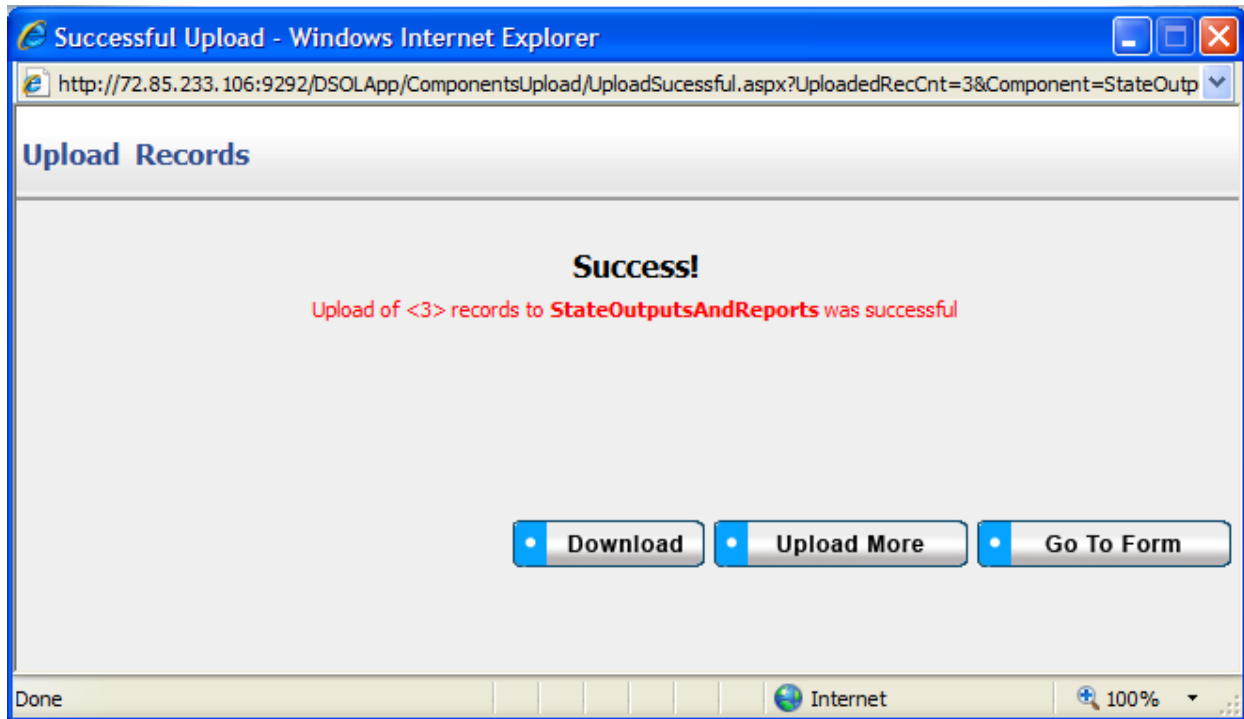


Figure 49 - Output Info Upload Success Pop-up Window

14. Selections from the Upload Success screen allow you to
 - a. "Download" – download the successfully loaded Output entries,
 - b. "Upload More" – return to the Output Upload screen, or
 - c. "Go to Form" – go to the Output Info screen.
15. Select one of the buttons, and proceed.

Edit an Output Info Entry

To edit an Output Info entry, use the following steps:

1. Select the Output Info entry to be edited from the "Name" drop-down list.
2. The window refreshes and displays the selected Output entry.
3. Modify the Output Info entry as needed.
4. Save the updated Output Info by clicking on the "Save" button at the bottom of the window.

Remove an Output Info Entry

You can accomplish the deletion of an Output Info entry, as follows:

1. Select the Output Info entry for deletion by clicking on the entry in the "Name" drop-down list. When the entry is selected, the screen will refresh and display the information for the selected entry.
2. The button bar at the bottom of the screen includes an additional button labeled "Remove Output." Click the "Remove Output" button.



Figure 50 - Expanded Output Info Button Bar

3. A pop-up window requires that you confirm the deletion.

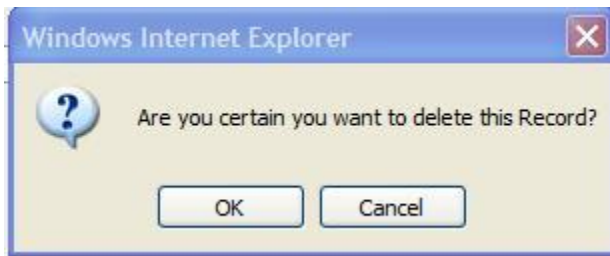


Figure 51 - Deletion Confirmation Pop-up Window

4. Click "OK" to confirm the deletion.
5. The window will refresh to a blank Output Info screen.

View Output Info Data Grid

The Data Grid view of Output Info is available by clicking on the "Data Grid View" button at the bottom of the Output Info screen. You can browse Output Info entries, edit an Output Info entry, delete an entry, or download the Output Info data. For further detail see "[Data Grid View](#)" section under General Features.

ESP Solutions Group

State of Tranquility

STATE OF TRANQUILITY

ESP Solutions Group DataSpecs™

Collections Repositories Outputs and Reports Elements Option Sets Search Support CourseWalk™ System Administration

Output Info | Output Item | Associated Links

Home > Outputs and Reports > Output Inventory

Outputs and Reports Inventory

Welcome Testuser Logout

☒ Active Only

Page Size: Set

Edit	Remove	Report ID	Report Name	Report Set	Report Number	Media	Effective Date	Expiration Date	Version	Format	Abstract	Privacy Restriction	Status	Detail level	Mandate	targetaudience
		8753	Annual School Report - School Approval Status-V1	ASR			12/10/2008		1				Active			

ViewAll Download Cancel

Figure 52 - Output Info Data Grid View

Generate Output Details

The Output Details Report lists information that has been entered about each Output entry for which details are desired.

To generate an Output Details Report:

1. For a report to include a specific Output Info entry, select the entry from the "Name" drop-down list.
OR
To list all Output Info entries, choose no Output Info entry in the "Name" drop-down box. (The box will display "--Select--" when no entry is chosen.)
2. Click the "Output Details Report" button at the bottom of the screen.
3. The report information is displayed, with the options to print it, or select a format for exporting the report data.

For further discussion regarding [Detail Report](#) see that section under General Features.

Outputs and Reports→Output Item

The Output Item screen displays the current list of unique data items for a selected Output. When an Output includes Output Items, the Item names are listed in the window on the left side of the screen. Details and constraints for each existing item can be viewed and edited in the fields on the right side of the form. Output Item functions allow you to:

- Add Output Item entries
- Upload Output Item entries for one or more Output
- Update or edit Output Items
- Remove one or more Output Items
- View a specific Output Item entry
- View a set of Output Item entries
- Generate Output Items Reports

Output Item Screen Layout & Description

Selecting “Output Item” within “Outputs and Reports” on the upper menu bars returns the Output Item screen.

The data groups on the Output Item screen include: Output information, Basic Information, Item Characteristics, Ownership, NCES Forum Guide, and History Tracking. The screen includes an Output Item box which will display the list of Output Items identified for the Output.

ESP Solutions Group

STATE OF TRANQUILITY

ESP Solutions Group
DataSpecs™

Collections Repositories Outputs and Reports Elements Option Sets Search Support CourseWalk™ System Administration

Home ▶ Output and Reports ▶ ▶
Output item

Welcome Testuser Logout

☒ Active Only

Output Name *
--Select--

Output Item

Create Options

☐ From Element
☐ New Version
☐ New from Copy
☐ New
☐ Import

☐ Section Info

Basic Information

Section Number Item Number Nest Level Target Audience
--Select--

Item * Display Name

Definition

Item Characteristics

Data Type Format Data Length Min Value Required Precision
--Select--

Max Value Default Value Formula

Element Option Set
--Select--

Ownership

Responsible Office Item Steward
--Select--

NCES Forum Guide

Recommended Uses Policy Questions

Caveats Cautions Additional Information

Components Commonly Reported Subgroups

Display Suggestions

History Tracking

Effective Date * Expiration Date Version *
1

Best viewed in 1024*768 resolution

ESP Solutions Group

Figure 53 - Output Item Screen (composite image)

The data fields for the Output Item screen components are described in the following tables.

Component Metadata –Output Item – Output Information		
Field	Definition	Optional(O)/ Required(R)
Active Only	When “Active Only” check box is checked, the information on the screen is filtered to show only current entries. Expired entries (entries where the “expiration date” has passed) remain the database, but are not displayed within the drop-down list or the Data Grid view).	
Output Name	The drop-down box to select the unique name or title of the Output.	R

When an Output/Report includes tables or repeating groups of data, these are documented within DataSpecs as Sections. Data items are numbered within the data group. Data groups may also be identified by “Nest Level” to document table dimensions. An example of table dimensions would be a two-level table including school year (nest level 1), and grade level (nest level 2), with a student count for the year/grade level.

Component Metadata – Output Item –Basic Information		
Field	Definition	Optional(O)/ Required(R)
Section Number	An identifier for the repeating data group Section. (The identifier may be numeric or text.)	O
Item Number	The sequence number of the item within a Section.	O
Nest Level	The number identifying the level of the item or group of items in a loop (nest). For example, when the output or report includes a count of students in membership by grade level, columns of the table would be documented as Output Items with the same nest level.	O
Target Audience	Designates the anticipated “audience” to use the Output item. (free-form text)	O
Item	The unique name of the data item within the Output.	R
Display Name	The text entry displayed with the item as column header or field name.	O
Definition	The free-form text definition of the Output Item.	O

Component Metadata – Output item – Item Characteristics		
Field	Definition	Optional(O)/ Required(R)
Data Type	The data type of the item: Binary/BLOB, Boolean, Date/Time, Memo, Number, Text, etc. (The choices for this list can be edited by using “Support” function.)	O
Format	The format in which the item should be displayed.	O
Data Length	The length of the item if it is defined.	O
Min Value	The minimum value allowed for the item.	O

Required	Indicates a status for the data item as "required," "conditional," or "optional." (The available options for this field can be modified by using "Support" function.)	O
Precision	The number of decimal places for numeric items.	O
Max Value	The maximum value allowed for the item.	O
Default Value	The default value of the item if there is one.	O
Formula	The formula used to derive the item, if it is a calculated field.	O
Element	The unique Element to which the item is mapped. The Element entry is selected from the drop-down list. (Element entries are created and edited through the Elements functionality. Click on "Element" to access the Elements screen.)	O
Option Set	The Option Set which contains the list of allowed values for the item. Option Set is selected from the drop-down list. (Option Set entries are created and edited through the Option Sets functionality. Click on "Option Set" to go to Options Sets screen.)	O

Component Metadata – Output Item – Ownership

Field	Definition	Optional(O)/ Required(R)
Responsible Office	The office responsible for the data item in this Output. The office is selected from the drop-down list. (Office entries can be modified by using the "Support" function. Click on "Responsible Office" hyperlink to access the Offices screen.)	O
Item Steward	The person responsible for the Output Item. The Steward is selected from the staff listing ("People"). (The staff list can be modified using the "Support" function. Click on "Item Steward" hyperlink to access the "People" screen.)	O

Component Metadata – Output Item – History Tracking

Field	Definition	Optional (O)/ Required (R)
Effective Date	The beginning date that the Output item with the specific attributes on the Output was (or will be) effective.	O
Expiration Date	The date that the Output item, with the specific attributes on the Output was (or will be) expired.	O
Version	An Output item identifier that indicates a change in the information has occurred from one instance to another. This user defined text field can be helpful with control of various copies.	O



Screen Functionality & Navigation – Outputs and Reports – Output Item

The Output Item form allows you to view and manage the information about the data items that are organized as an Output or a Report. The Output Items Form will allow you to perform the following actions:

- Select “Active Only” Filter to View All Outputs or to View Only Active Outputs
- Add Output Items
- Edit Output Items
- Remove Output Items
- View the Output Items Data Grid

Select “Active Only” Filter to View All Output Items or to View Only Active Output Items

The “Active Only” check box controls whether all Outputs are shown or only the active Outputs are listed in the Output Name drop-down box. The default is to view only the active Output Names. When you need to view or access all Outputs, you uncheck “Active Only” and the window will refresh with a list of all Outputs in the system.

An Output is active while as its “Expiration Date” has not passed. Once the “Expiration Date” is reached, an Output is considered “Inactive.”

Entering and Editing Output Item Data

When you enter Output Item data, various fields may be edited by the following methods:

- Enter data directly into an editable field
- Select a predefined choice from the drop-down list
- Click on the checkbox or radio button
- Click on the Calendar icon to specify a date for a date field or type the date

Output Item Names, Item Numbers, and Section Numbers are displayed in the Output Item box to the top left of the screen. The screen component includes a scroll bar for you to scroll down to view additional Output Item entries.

When working with Output Items, you should consider numbering items to provide order to the listing. DataSpecs is expected to display Output Items in Item Number sequence.

The fields “Item Steward” and “Responsible Office” may either be selected from the list of “People” or “Offices” or they may be new entries that are added to “People” or “Offices” lists. Information in both fields may be managed directly using SUPPORT -> Offices or SUPPORT -> People.

You select the Output by using the drop-down list in the Output Name.

Note: All required fields must be completed before you can “Save” the Output Item. The required fields are identified on the screen with an asterisk beside the field name.

Add Output Items

To “Add Output Items” to an Output, select one of the “Create Options” radio buttons:

- New
- New Version
- New From Copy
- From Element

April 2014

- Import

For Create Option:

- **New**

1. Select the "Output Name" for the new Output Item in the drop-down list in the upper left of the screen.
2. The screen will refresh and display Output Items (if any) which are already associated with the Output.
3. In the "Create Options" box, at the lower left of the screen, click the radio button "New," and then the "Add New" button at the bottom of the box.
4. Enter the information associated with the new Output Item.
5. Click "Save" button at the bottom of the window.
6. The new Output Item entry will be saved and window will refresh and list the new Item name in the "Output Item" box.

- **New from Copy**

(Used when the new Output Item details are similar to another Output Item entry.) (The "New from Copy" radio button is activated when an Output Item is selected in the "Output Item" box.)

1. Select the "Output Name" for the new Output Item in the drop-down list in the upper left of the screen.
2. The screen will refresh and display Output Items (if any) which are already associated with the Output.
3. In the Output Item box at the top left of the screen, click on the Output Item entry to be copied.
4. The screen refreshes to display the information associated with the entry to be copied.
5. In the "Create Options" box at the lower left of the screen, click the radio button entry for "New from Copy", and then select "Add New" button at the bottom of the "Create Options" box.
6. The "Edit Field Name" pop-up window will display.

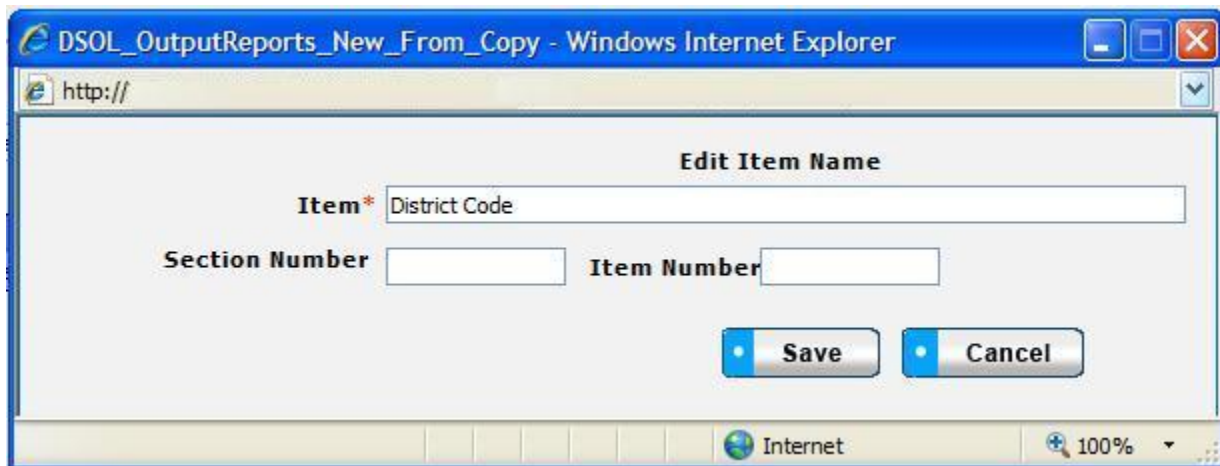


Figure 54 - Output Item New from Copy Pop-up Window

7. You will enter the name of the new Output Item entry and the Section Number and Item Number for the new entry. Then click "Save" in the pop-up window.
8. The screen will refresh and display the copied data with the new Output Item.
9. Enter and modify the other information associated with the new item.

April 2014

10. Click "Save" button at the bottom of the window.
11. The new Output Item entry will be saved and the item name will be listed in the "Output Item" box.

- **New Version**

(Used when there are slight changes in the Output Item entry, normally when the change is minor and is time-dependent.) (The "New Version" radio button is activated when an Output Item is selected in the "Output Item" box.)

1. Select the "Output Name" from the drop-down list in the upper left of the screen.
2. The screen will refresh and display table fields (if any) which are already associated with the Output.
3. "Mouse over" and click on the Output Item entry in the box in center left of screen for the Item entry to be copied.
4. Select the radio button for "New Version," and then click "Add New" button within the "Create Options" box.
5. The screen will refresh and display the copied entry. The Effective Date will be today's date, and Version will be incremented by 1.
6. Edit or modify the Output Item entry as needed.
7. Click "Save" button.
8. New entry is saved, and the Item name appears in the "Output Item" list with the new version number.

- **Add From Element**

Note: This function requires that the Element to be copied must be loaded in the DataSpecs dictionary. See "Element" section for details.

1. Select the "Output Name" from the drop-down list in the upper left of the screen.
2. The screen will refresh and display table fields (if any) which are already associated with the Output.
3. Within the "Create Options" box, select the radio button "Add From Element," and then click "Add New" button.
4. A pop-up window is returned, with a scrollable list of Elements from which to select.

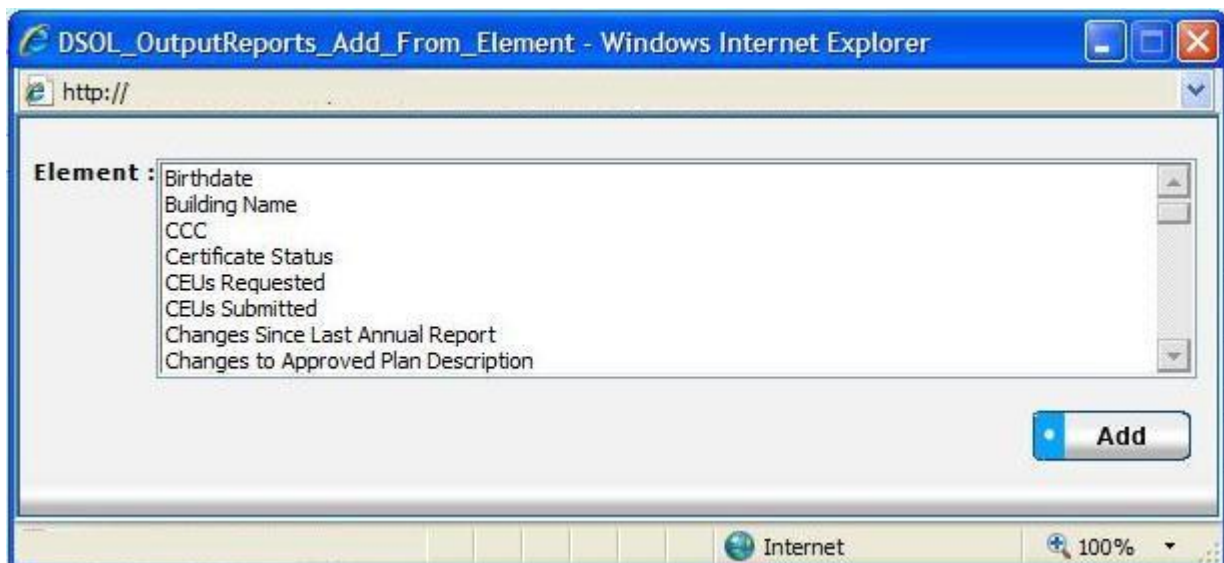


Figure 55 - Output Item Copy from Element Pop-up Window

5. Scroll to the Element Name and click on the chosen element. Then click the "Add" button at the bottom of the pop-up window. NOTE: You can also type the first character of the Element Name to position to the elements starting with that character.
6. The screen will refresh and display an Output Item screen with the field characteristics entries copied from the Element entry and no entries in the Basic Information area.
7. Enter the required fields and modify any other displayed Output Item information.
8. When finished, click the "Save" button at the bottom of the screen.
9. New Output Item entry is saved, and the name of the new entry appears in the "Output Item" list.

- **Import**

(Used when the new Output Items information is available in a file)

The Import functionality is useful to migrate or move a large volume of data into DataSpecs. Import is typically used when you have a file or can create a file with one or more Output Item entries.

1. At the Output Items screen, click "Import" radio button in the Create Options box on the lower left of the screen, and then select "Add New".
2. The Output Upload screen is returned.
3. If you require a copy of the Output Item template, select "Output Item" in the DataSpecs Component Type drop-down box, and then click on the "Download Template" button to the right of the box. The File Download screen allows you to save the OutputItems.xls" file or open it. (NOTE: DataSpecs uses EXCEL 97-2003 Workbook file format for this purpose.)
4. Enter or load the Output Item data that you want to upload into the template rows. Each Output Item entry is loaded as a separate row. Save the EXCEL file with a unique file name.
5. Select "Output Item" in the "DataSpecs Component Type" drop-down box.
6. Either browse to locate the name of the "File to Import" or enter the directory and file name information for the file to be imported.
7. Click the "Validate and Import" button.
8. If there are errors in the Import file, Violations message(s) will be displayed. You can print the error message or Print or Save the Violation spreadsheet.
9. Correct any errors in the file that you are importing. Save the corrected file. Return to step 6.
10. When the DataSpecs message "No violation occurs, please click on upload" is returned, respond "OK" button on the message screen.
11. Click on the "Upload" button.
12. A "Success" screen is displayed with a count of the Output Item entries loaded.

Edit an Output Item

Edit of an Output Item can be accomplished as follows:

1. Select the Output Item entry to be copied from the Output Item box at the top left of the screen. Mouse over the item and click to select it.
2. The screen will refresh to display data for the selected Output Item.
3. Change the information as needed.
4. Click the "Save" button at the bottom of the window to save the changes.

Remove an Output Item

To "Remove an Output Item," you:

1. Select the Output Name and the Output Item entry to be deleted in the Output Item box at the top left of the screen. Mouse over the item and click to select it.
2. The screen will refresh to display data for the selected Output Item.
3. Click the "Remove Item" button at the bottom of the Output Item window.
4. A pop-up window requires that you confirm the deletion. Click "OK" to confirm.

5. The Output Item is deleted from the database, and the window will refresh to a blank Output Item screen.

View the Output Item Data Grid

1. Select the Output Name for Output Items to be displayed in the Data Grid view.
2. Click on the "Data Grid View" button at the bottom of the screen.
3. The "Output Item Inventory" screen displays the Output Items for the selected Output and Output Item.
4. Use scroll bars on right and at bottom of the table to view all columns and rows.
5. Output Item entries can be edited or removed using EDIT or REMOVE buttons available on each entry.
6. For additional detail, see "Data Grid View" section under General Features.

Outputs and Reports → Output Item → Map To Repository

Map to Repository functionality supports documenting relationships between Output Items and Repository Fields.

Data movements and transitions from Repositories to Outputs and Reports are important sets of information to identify impacts of changes to repositories and/or outputs/reports. Changes like new or modified option sets between Outputs and Repositories can be documented to support necessary data management analysis and decision-making.

Note: Before you proceed with mapping, the “target” Repository, Repository Table, and Repository Fields to be referenced in the Output Item mapping process must be entered (loaded) in DataSpecs.

The Map to Repository Screen provides capabilities to:

- Map (Link) an Output Item entry to a Repository Field
- Un-map (remove a link) between an Output Item and a Repository Field
- View one or all Output Items with maps (links) to Repository Fields

Output Item Map to Repository Screen Layout & Description

When you select “Map to Repository” (a drop-down from “Output Item” on the upper menu bar), the following screen is returned:

The screenshot displays the 'Map To Repository' screen within the DataSpecs application. The top navigation bar includes 'Collections', 'Repositories', 'Outputs and Reports', 'Elements', 'Option Sets', 'Search', 'Support', 'CourseWalk™', and 'System Administration'. The 'Outputs and Reports' section is expanded, showing 'Output Info', 'Output Item', and 'Associated Links'. The 'Map To Repository' option is selected under 'Output Item'. The main content area features a form with the following fields: 'Output Name' (a dropdown menu), 'Output Item' (a text input field), 'Item Name' (a text input field), 'Repository' (a dropdown menu), 'Table Name' (a dropdown menu), 'Field Name' (a dropdown menu), and 'Field Description' (a text input field). To the right of the 'Repository' dropdown is an 'Order Field List' section with two radio buttons: 'Alphabetically' (selected) and 'Table Order'. At the bottom right, there are two buttons: 'Data Grid View' and 'Cancel'. The top right corner shows the user 'Testuser' and a 'Logout' button.

Figure 56 - Output Item - Map to Repository Screen (composite image)

The groupings of data on the Map to Repository screen include:

- Output Name
- Output Item box (where the list of Output Items will be displayed)
- Item Name (where the selected Output Item will be listed)
- Repository
- Table Name (the Repository Table Name)
- Field Name (the Repository Field Name)
- Field Description (the Repository Field Definition)

Screen items relating to Output and Output Item are defined within this section of the User's Guide. Definitions for items that reference Repository Table Name, Field Name and Field Definition are available in the Repository Section of the User's Guide.

Screen Functionality & Navigation – Output Item – Map to Repository

You can view and manage information regarding the Output Item mapping to Repository Field. The Output Items Form supports the following actions for the selected Output:

- Select “Active Only” Filter to View All Outputs or to View Only Active Outputs
- Map (link) an Output Item to a Repository Field
- Un-map (remove the link between) an Output Item and a Repository Field
- View Output Items/Repository Mapping Data Grid
- Generate a Repository Mapping Detail Report

Select “Active Only” Filter to View All Output Items or to View Only Active Output Items

The “Active Only” check box controls whether all Outputs are shown or only the active Outputs are listed in the Output Name drop-down box. The default is to view active Output only. When you need to look at a non-active Output, you uncheck “Active Only” and the window will refresh with a list of all Outputs in the system.

An Output is considered “active” as long as its “Expiration Date” has not passed. Once the “Expiration Date” is reached, an Output is considered “Inactive.”

Map an Output Item to a Repository Field

Output Item Names, Item Numbers, and Section Numbers are displayed in the Output Item box to the top left of the screen. The screen component includes a scroll bar for you to scroll down to view additional Output Item entries.

1. Select the Output within the Output Name drop-down box. Click on the Output Name entry.
2. The screen refreshes. Output Items for the selected Output Name are shown in the Output Item box (Upper left on screen).
3. Select the Output Item to be linked by clicking on the Item name within the box.
4. The screen refreshes and the Output Item Name is displayed in the Item Name box.
5. Select the “Order Field List” radio button mode that works for you to locate the Repository Field Name.

If you select “Table Order,” the Repository Fields are listed in the order they were created in the Table. The selection “Alphabetical Order” will list the fields alphabetically. The example tables below list fields within a “Student Data” Table in the two orders.

"Student Data" fields in Table Order
School Name
First Name
Last Name
Address
Homeroom Teacher

"Student Data" fields in Alphabetical Order
Address
First Name
Homeroom Teacher
Last Name
School Name

1. Select the "target" Repository, Table Name, and Field Name in the respective drop-down boxes.
2. The screen refreshes with each selection. When Field Name is selected, the Field Definition is displayed in the Field Description box.
3. Click on the "Map Item" button at the bottom of the screen.
4. The map (link) is saved, and the screen refreshed. The red asterisk at the right of the Output Item in the Output Item box indicates that there is a mapping entry for the item.

Un-map an Output Item and a Repository Field

To Un-map (remove the links between) an Output Item and a Repository Field, you:

1. Select the Output and the Output Item entry to be un-mapped in the Output Item box at the top left of the screen. Mouse over the item and click to select it.
2. The screen will refresh to display data for the selected Output Item.

Figure 57 - Output Item Map to Repository Un-map Screen

3. Click the "Un-map" button at the bottom of the window.
4. A pop-up box requests confirmation that you wish to proceed to Un-map the entry.
5. Confirm by clicking "OK" in the pop-up window, or choose "Cancel" button, if you don't want to remove the link to the Repository Field.

View Map to Repository Data Grid

To view the Data Grid View of the Map to Repository entry or Entries, use the following steps,

1. Select the Output Name for the Output Items to be displayed in the Data Grid view.
2. Click on the "Data Grid View" button at the bottom of the screen. The "Map to Repository Grid" screen displays the Item Names which have been mapped to a Repository for the selected Output.

The screenshot shows the DataSpecs web interface. The top navigation bar includes links for Collections, Repositories, Outputs and Reports, Elements, Option Sets, Search, Support, CourseWalk™, and System Administration. The current page is titled "Output MapTo Repository Grid". Below the title, there is a "Page Size" dropdown set to "Set" and a "View All" button. The main content area displays a table with the following data:

Edit	Remove	Output Name	Item Name	Table Name	Field Name	Repository Name	TableField Name	FieldDescription
		Annual School Report Summary	School Code	School Identification Table	SchoolCode	School Directory	School Code	The school identifier within the state.
		Annual School Report Summary	School Name	School Identification Table	SchoolName	School Directory	School Name	

At the bottom of the table, there are buttons for "ViewAll", "Download", and "Cancel". The footer of the page indicates "Best viewed in 1024*768 resolution" and the ESP Solutions Group logo.

Figure 58 - Output Item Map to Repository Data Grid View

3. Use scroll bars on right and at bottom of the table to view all columns and rows.
4. Output Item entries can be edited or removed using EDIT or REMOVE buttons available on each entry.
5. For additional detail, see "Data Grid View" section under General Features.

Outputs → Associated Links

The Associated Links functionality supports documenting hyperlinks to Output materials which could include output and report documentation, information relating to output and report uses, and other related websites.

Outputs Associated Links Screen Layout & Description

The Associated Links screen, shown below, is returned when the “Associated Links” option is selected on the second-tier navigation bar at the top of the screen.

Figure 59 - Outputs Associated Links Screen

The areas on the screen include: Output Name and Associated Links, and the Associated Link Information grouping.

Component Metadata – Outputs and Reports – Associated Links		
Screen Item	Definition	Optional(O)/Required(R)
Output Name *	A user-defined unique name or title that represents an Output.	R
Associated Links	The list of selectable Associated Links which have been associated with the chosen collection. Link entries are shown in this box (on the upper left of the screen) when the entry is “added.”	

Description	A narrative description of the contents of the Output associated links entry.	O
Associated Link Info		
Screen Item	Definition	Optional(O)/Required(R)
Associated Link	The user-defined name of the Associated Link related to the Link URL.	R
Link Description	The free-form text description of the Associated Link.	O
Link URL	The hyperlink URL (uniform resource locator) specifying where the Associated Link is available.	R
Notes	The free-form text notes about the Associated Link.	O

Screen Functionality & Navigation – Associated Links

The Associated Links screen supports the following actions:

- Select “Active Only” filter to list all Associated Links related to the chosen Output Name, or to list only active Associated Links
- Add an Associated Link
- Import one or more Associated Link entries
- Edit an Associated Link
- Delete an Associated Link
- View Associated Links Data Grid

Select “Active Only” Filter to View All Associated Links or to View Only Active Associated Links

The “Active Only” check box controls whether all entries for the Associated Links are shown or only the active entries are listed in the drop-down boxes on this screen. The default is to view active entries only. When you need to look at a non-active (expired or future) entry, you uncheck “Active Only” and the window will refresh with drop-down lists of all entries in the system.

An entry is active as long as its “Expiration Date” has not passed. Once the “Expiration Date” is reached, an Output is considered “Inactive”.

Add an Associated Link

To add an Associated Link, complete the following steps:

1. Select the “Output Name” in the drop-down list in the upper left of the screen.
2. The screen will refresh and display Associated Links (if any) which are already associated with the chosen Output.
3. Click the “Add” button at the bottom of the screen. The screen will refresh with blank fields in the Associated Link Info area.
4. Enter the information associated with the new link entry.
5. Click “Save” button at the bottom of the window.
6. The new Associated Link entry will be saved and the link name will be listed in the “Associated Links” box in the upper left of the screen.



Import Associated Links

Import functionality is useful to migrate or move a large volume of data into DataSpecs. Import is typically used when you have a file or can create a file with one or more Associated Link entries.

1. At the Associated Links screen, click the "Import" button on the bottom bar.
2. The Output Upload screen is returned.
3. Select "Associated Link" in the DataSpecs Component Type drop-down box.
4. If you require a copy of the Collection Associated Links template, click the "Download Template" button. The File Download screen allows you to save the "CollectionAssociatedLinks.xls" file or open it. (NOTE: DataSpecs uses EXCEL 97-2003 Workbook file format for this purpose.)
5. Enter or load the Collections Associated Links data that you want to upload into the template rows. Each Output table entry is loaded as a separate row. Save the EXCEL file with a unique file name.
6. Select "Associated Links" in the "DataSpecs Component Type" drop-down box.
7. Either browse to locate the name of the "File to Import" or enter the directory and file name information for the file to be imported.
8. Click the "Validate and Import" button.
9. If there are errors in the Import file, Violations message(s) will be displayed. Print or Save the Violation spreadsheet.
10. Correct any errors in the file. Save the corrected file. Return to step 6.
11. When the DataSpecs message "No violation occurs, please click on upload" is returned, respond "OK" button on the message screen.
12. Click on the "Upload" button.
13. A "Success" screen is displayed with a count of the Associated Links entries loaded.

Edit an Associated Link Entry

To edit an Associated Link entry:

1. Select the "Output Name" in the drop-down list in the upper left of the screen.
2. The screen will refresh and display Associated Links (if any) which are already associated with the chosen Output.
3. Select the Associated Link entry that you wish to edit from those listed in the "Associated Links" window. (Mouse over the entries and click.) The screen will refresh and display the information for the Associated Link.
4. Make the necessary modifications for the entry.
5. Click "Save" button at the bottom of the window.
6. The updated Associated Link entry will be saved.

Delete an Associated Link Entry

To remove an Associated Link entry:

1. Select the "Output Name" in the drop-down list in the upper left of the screen.
2. The screen will refresh and display Associated Links (if any) which are already associated with the chosen Output.
3. Select the Associated Link entry that you wish to edit from those listed in the "Associated Links" window. (Mouse over the entries and click.) The screen will refresh and display the information for the Associated Link and the "Remove" button will be included at the bottom of the screen.



Figure 60 - Outputs Associated Links Delete Button Bar

- Click the "Remove Field" button. A pop-up window is presented asking for you to verify that you want to delete the field.



Figure 61 - Outputs Associated Link Delete Pop-up

- Respond "OK" to complete the deletion.
- The record is deleted, and the Output Fields window refreshes.

View Output Associated Links Data Grid

To view the Data Grid View of the Output Associated Links entry or entries, use the following steps.

- Select the Output Name for the Output Items to be displayed in the Data Grid view.
- Click on the "Data Grid View" button at the bottom of the screen. The "Associated Link" Grid View screen displays the Associated Links which have been entered for the selected Output.

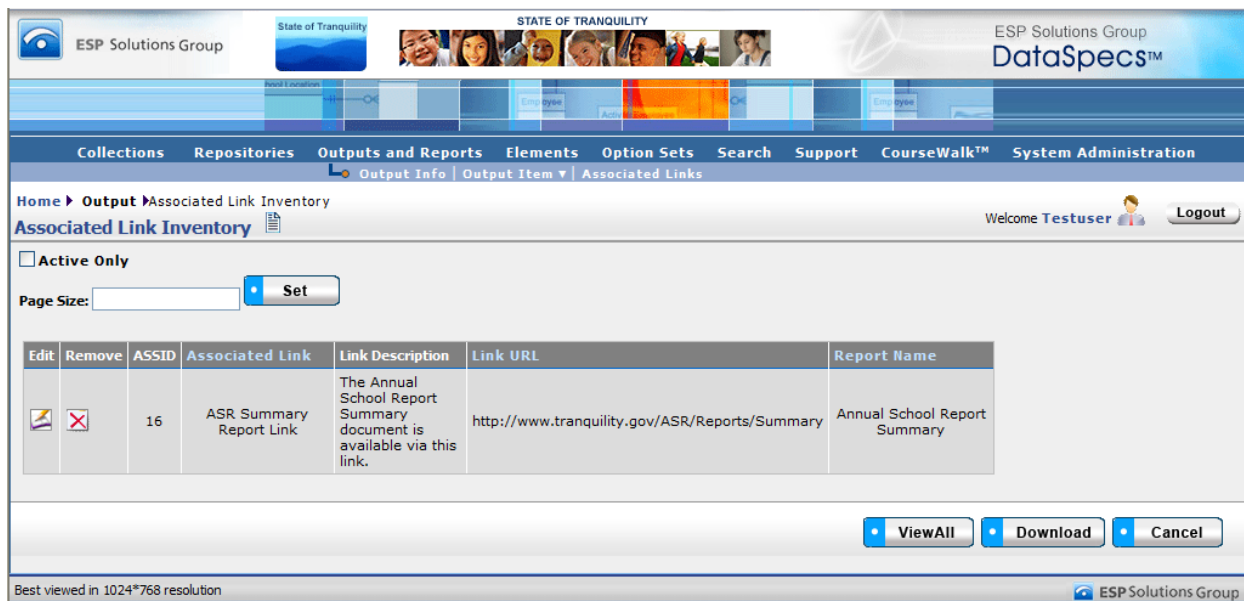


Figure 62 - Output Associated Links Data Grid View

- Use scroll bars on right and at bottom of the table to view all columns and rows.
- Output Item entries can be edited or removed using EDIT or REMOVE buttons available on each entry.
- For additional detail, see "Data Grid View" section under General Features.

Elements

Elements Functionality

Elements functionality supports the following Data Inventory steps:

1. Load initial **Elements** to create the initial Data Dictionary.
2. Relate Data Dictionary Elements to Option Sets.
3. Relate Collection Items to available Data Dictionary Elements, adding Element entries as desired.
4. Relate Repository Fields to available Data Dictionary Elements, and add Element entries as needed.
5. Relate Output/Report Items to available Data Dictionary Elements, and add Element entries as needed.

The second-tier menu bar at the top of the DataSpecs screen lists the following action areas for Elements:

- Elements Info
- NCES Handbook
- Map to NCES Handbook
- Categorize
- NCES Option Sets
- NCES Options
- NCES Categorize

Using the above functionality, you can enter, upload, and download the data inventory metadata for Elements, and organize the data elements in your dictionary by relating them to categories. In addition, you can access and link your dictionary elements to NCES Handbook data elements, and NCES option sets.

Elements → Elements Info

Elements Info is the information about individual data elements in your Data Dictionary. The screen provides functionalities to:

- Add a single element entry,
- Upload element info for one or more elements,
- Update or edit an element,
- Remove an element,
- View a specific element entry, and
- View a set of element entries in the Data Grid View

Element Info Screen Layout & Description

When you select “Element Info” from the upper menu bar, the following screen is returned.

The screenshot displays the 'Element Info' screen within the DataSpecs application. The interface includes a top navigation bar with links such as 'Collections', 'Repositories', 'Outputs and Reports', 'Elements', 'Option Sets', 'Search', 'Support', 'CourseWalk™', and 'System Administration'. Below this, a breadcrumb trail shows 'Home > Elements >'. The main content area is divided into several sections:

- Basic Information:** Contains a checkbox for 'Active Only', a dropdown for 'Element Name', and input fields for 'State Alias' and 'State Number'.
- Definition:** A large text area for defining the element.
- Element Characteristics:** Includes dropdowns for 'Data Type' and 'Data Format', and input fields for 'Min Value', 'Max Value', 'Data Length', and 'Data Precision'.
- Options:** A dropdown for 'Option Set'.
- History Tracking:** Includes input fields for 'Effective Date', 'Expiration Date', and 'Version'.
- Categorization:** A button labeled 'Categorize Element' and a text area for categorization details.

At the bottom of the screen, there are buttons for 'Data Grid View', 'Add Element', and 'Cancel'. A status bar at the very bottom indicates 'Best viewed in 1024*768 resolution' and 'ESP Solutions Group'.

Figure 63 - Element Info Screen (composite image)

The groupings of data on the Collections Info screen include: Basic Information, Definition, Element Characteristics, Options, History Tracking, and Categorization. The fields within these components are defined in the tables that follow, and each field is identified as either Required or Optional.

Component Metadata – Elements - Elements Info Basic Information		
Screen Item	Definition	Optional(O)/ Required(R)
Element Name *	The unique name by which the element is commonly known. Encourage use of full titles for data elements, avoiding acronyms and abbreviations so that the entries serve as a “data dictionary.”	R
State Alias	An alternative name for the element. This alias could be the default database field name for the element. There may be restrictions on the format of names which can be used as an alias.	O
State Number	The state identifier (ID) if the state has an existing element numbering scheme for data elements.	O
Definition	The definition for the element.	O
D3M Element		O
NCES Element Number	The NCES Handbook element number of the Handbook entry to which the Element relates.	O
Option Set	The Option Set which contains the list of valid values for the field	O

Element Characteristics		
Screen Item	Definition	Optional(O)/ Required(R)
Data Type	The data type of the item: Binary/BLOB, Boolean, Date/Time, Memo, Number, Text, etc. (The choices for this list can be edited by using the “Support” function.)	O
Min Value	The minimum value allowed for the element.	O
Max Value	The maximum value allowed for the element.	O
Data Format	The format in which the element should be entered or displayed.	O
Data Length	The length of the element, if it is defined.	O
Data Precision	The number of decimal places for numeric items.	O

Options		
Screen Item	Definition	Optional(O)/Required(R)
Option Set	The Option Set which contains the list of allowed values for the element.	O

Categorization		
Screen Item	Definition	Optional(O)/Required(R)
Element Categorization	The category or categories within which this element has been classified.	O

History Tracking		
Screen Item	Definition	Optional(O)/Required(R)
Effective Date	The date that the table with the specific attributes will be (or was) effective.	R
Expiration Date	The date that the table with the specific attributes will be (or was) expired.	O
Version	The version of the repository table description.	R

Screen Functionality & Navigation – Element

On the Element screen, you can view and manage information that composes your data dictionary. The Elements form supports the following actions:

- Select the “Active Only” Filter to View All Elements or to View Only Active Elements;
- Add an Element or a group of Elements;
- Edit an Element entry;
- Remove an Element entry, and
- View the Elements Data Grid.

Select “Active Only” Filter to View All Elements or to View Only Active Elements.

The “Active Only” check box controls whether all elements are shown or only the active elements are listed in the Element Name drop-down box. The default is to view active element only. When you need to look at a non-active element, uncheck “Active Only” and the window will refresh with a list of all elements in the system.

An element is active as long as its “Expiration Date” has not passed. Once the “Expiration Date” is reached, an element is considered “Inactive”.

Entering and Editing Element Data

When entering element data, various fields may be edited by the following methods:

- Enter data directly into an editable field.
- Select a predefined choice from the drop-down list.
- Click on the checkbox or radio button.
- Click on the Calendar icon to specify a date for a date field or type the date.

Element Names, Item Numbers, and Section Numbers are displayed in the Element box to the top left of the screen. The screen component includes a scroll bar for you to scroll down to view additional Element entries.

Add an Element

To “Add Collection Items” to a Collection, select one of the “Create Options” radio buttons in the popup window:

- Add New
- New Version
- New from Copy
- Add from NCES Handbook
- Import

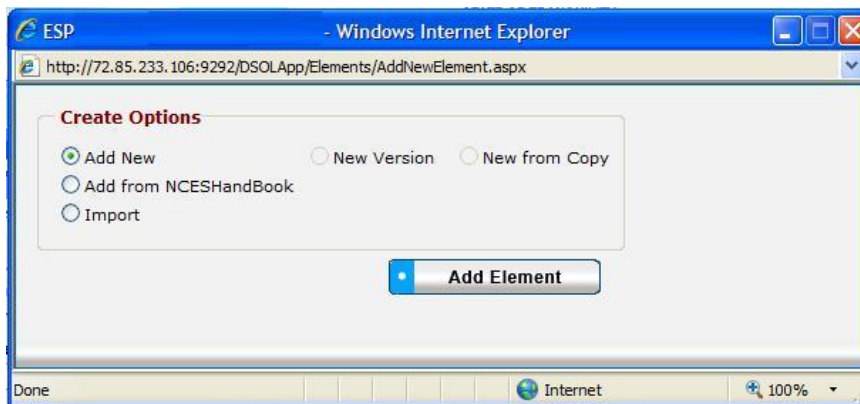


Figure 64 - Elements Create Options Popup Window

“Add New,” “New Copy,” and “New Version” selections each support entering or creating a single element entry. The “Import” selection supports loading one or more element entries.

• Add New

1. Click on the “Add Element” button at the bottom of the Elements screen.
2. The “Create Options” popup window is returned.
3. Select “Add New” radio button and click on “Add Element” button in the popup window.
4. The Elements window is refreshed with blank fields.
5. Enter information describing the new Element.
6. Click the “Save” button at the bottom of the window.
7. Data are saved, and the new Element name will be displayed in the Elements box.

• New Version

(The “New Version” radio button is activated when an element is chosen.)

Note: This option would typically be used when an existing Element entry has minor modifications, like a change to element characteristics. Entries are unique when effective date and/or

version number are different. Versioning helps to maintain information on current elements and attributes, as well as for past and future versions of elements.

1. Select the Element Name entry to be copied to create the new version in the drop-down Element Name box at the top left of the screen.
2. The screen is refreshed, displaying the information for the selected Element.
3. Click on the "Add Element" button at the bottom of the screen and get the "Create Options" popup window.
4. Select the "New Version" radio button in the popup window, and click on "Add Element" at the bottom of the popup.
5. The screen will refresh to display the selected Element information, and the "Version" number will be incremented by one.
7. Make necessary changes to the Element information.
8. Click the "Save" button.
9. Data are saved, and the revised Element information is displayed in the Element box. (Element version numbers are displayed at the end of the Element name.)

- **New from Copy**

(The "New from Copy" radio button is activated when an element is chosen.)

Note: Use New Copy when an existing Element entry has minor changes, like minor differences in definition.

1. Select the Element Name entry to be copied to create the new Element within the drop-down Element Name box at the top left of the screen.
2. The screen is refreshed and displays the information for the selected Element.
3. Click on the "Add Element" button at the bottom of the screen and get the "Create Options" popup window.
4. Select the "New from Copy" radio button in the popup window, and click on "Add Element" at the bottom of the popup.
5. The Element Name popup window is displayed.
6. Enter the new name for the Element entry to be copied, and click "Save" to proceed. ("Cancel" will return you to the "Elements" screen.)
7. The screen will refresh to display the selected Element information with the new name you entered.
8. Make necessary changes to the Element information.
9. Click the "Save" button.
10. Data are saved, and the revised Element information is displayed in the Element box.

- **Add from NCES Handbook**

Note: This option is used when the new Element details are similar to an NCES Handbook element entry.

1. Click the "Add Element" button at the bottom of the screen and get the "Create Options" popup window.
2. Select the radio button for "Add from NCES Handbook" in the popup window, and click on "Add Element" at the bottom of the popup.
3. The Elements NCES Handbook screen is returned.
4. Select the NCES Element entry that you wish to copy in the drop-down box at the top left of the screen, and click on "Save" button at the bottom of the screen.



Figure 65 - Elements NCES Handbook Screen

5. The Elements screen is returned, with the “NCES Element Number” entry identified as you selected.
6. Enter the Element name for the new entry.
7. Enter and change any other Element information.
8. Click the “Save” button.
9. Data are saved, and the revised Element information is displayed in the Element box.

- **Import**

Note: This option would typically be used when you have a file or can create a file with one or more repository entries.

1. Click on the “Add Element” button at the bottom of the Element Info screen.
2. In the Create Options pop-up window, first select the “Import” radio button, and then click on the “Add Element” button in the window.
3. The Element Upload screen is returned.

Figure 66 - Element Upload Screen

4. If you require a copy of the Element file template, select “Element” in the “DataSpecs Component Type” drop-down box, and then click on the “Download Template” button. The File Download screen allows you to save the “Element.xls” file or open it.
5. Enter the Element data that you want to upload into the template rows. Each Element is entered as a separate row. Save the EXCEL file. (NOTE: DataSpecs uses EXCEL 97-2003 Workbook file format for this purpose.)
6. Select “Element” in the “DataSpecs Component Type” drop-down box.
7. Either browse to locate the name of the “File to Import”, or enter the directory and file name information for the prepared file.
8. Select the “Validate and Import” button.
9. If there are errors in the Import file, violations message(s) will be displayed. You can print the error message, or save the violation file. The violation file shows the upload records with errors, and the field with a violation is shown in red font.
10. Correct any errors in the file; save the file again. Return to step 6.
11. When the DataSpecs message “No violation occurs, please click on upload” is returned, click the “OK” button on the message screen.
12. Click on the “Upload” button.

13. A “Success” screen is displayed with a count of the Element records loaded.



Figure 67 - Element Upload Success Screen

14. In the “Success” screen, select “Go To Form” button to return to Elements screen and view the element entry; select “Upload More” to continue importing element entries; or select “Download” to export a copy of the element entries just loaded.

Edit an Element Entry

To edit an Element entry, use the following steps:

1. Select the Element to be edited by clicking on the entry in the “Element Name” drop-down list.
2. The window will refresh to present data associated with that Element Name.
3. Make your changes to the element entry.
4. Save the updated Element entry by clicking the “Save” button at the bottom of the window.

You may also locate the Element entry to be edited by using the Data Grid View and scrolling through the Element names to locate a specific entry.

Remove an Element Entry

Use the following steps to remove an Element entry.

1. Select the Element to be deleted by clicking on the entry in the “Element Name” drop-down list.
2. The window will refresh to present data associated with that Element Name.
3. When an Element is selected, the button bar at the bottom of the screen includes an additional button - “Remove.”

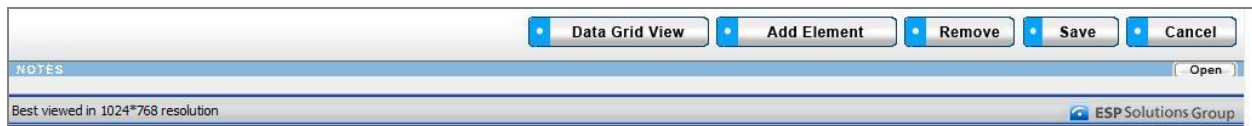


Figure 68 - Expanded Button Bar

4. Click on the “Remove” button.
5. A popup window requires that you confirm the deletion. Click “OK” to proceed.
6. The entry is deleted, and the Elements screen refreshes, showing no entry.

You may also locate the Element entry to be deleted by using the Data Grid View and scrolling through the Element names to locate a specific entry.

View the Elements Data Grid

You can use the Elements Data Grid view to locate and select an Element entry for editing or for deletion. The Data Grid view also provides download capability.

1. Select the Element to be displayed in the Data Grid view by clicking on the entry in the "Element Name" drop-down list, or leave the Element Name blank to return the complete list of Element entries.
2. Click on the "Data Grid View" button at the bottom of the screen.
3. The "Total Elements Inventory" screen displays the Element entry (or entries).
4. Use scroll bars on right and at bottom of the table to view all columns and rows.
5. Element entries can be edited or removed, using EDIT or REMOVE buttons available on each entry.

For additional detail, see "Data Grid View" section under General Features

Elements → NCES Handbook

The NCES Handbook screen provides access to the NCES Handbook Element names and displays the relevant information about the Handbook entry.

NCES Handbook element definitions and option sets are a resource to assist education organizations with data collection. Handbook entries include data element names, definitions, and option sets, which are organized and categorized for search and retrieval. NCES Handbook elements are frequently referenced in the SIF Association specification.

By documenting relationships of your data dictionary entries to NCES Handbook elements, the clients using your dictionary can review your dictionary element name, definition, and option set against the selected entry from the Handbook.

NOTE: NCES Handbooks elements, definitions, and option sets are updated periodically. Updates to Handbook entries are tagged with a version and an effective date to identify the specific instance of a Handbook element entry.

NCES Handbook Screen Layout & Description

When you select "Table Fields" on the second-tier navigation bar at the top of the screen, the following screen is returned.

The screenshot displays the NCES Handbook screen within the DataSpecs application. The top navigation bar includes links for Collections, Repositories, Outputs and Reports, Elements (selected), Option Sets, Search, Support, CourseWalk™, and System Administration. The main content area is titled 'NCES Handbook' and contains several input fields: 'NCES Element' (0596-Migrant to Join Date), 'Element Number' (0596), 'Element Type' (ID), and 'Field Length' (4). A 'Definition' text area contains the text: 'The month, day, and year on which the student moved, which is either before or after the date the parent, guardian, or spouse moved to seek qualifying work. When the student's move precedes the worker's move,'. Below this is a section for 'NCES Related Categories' with an empty text box. At the bottom, there are buttons for 'Data Grid View', 'Print', 'Save', and 'Cancel'. The footer indicates 'Best viewed in 1024*768 resolution' and 'ESP Solutions Group'.

Figure 69 - Elements NCES Handbook Screen

The following fields are available for an NCES Handbook Element entry:

Component Metadata – Repository -> Table Field		
Screen Item	Definition	Optional(O)/Required(R)
NCES Element	The name of the NCES Handbook element entry.	
Element Number	The NCES Handbook element number assigned to the NCES Element.	
Element Type	<p>The element type assigned to the NCES Element. Handbooks element types include:</p> <ul style="list-style-type: none"> • ID – defined by a code set • AN – alpha/numeric (may include one or more letters or numbers) • N – numeric (not including decimal numbers) • R – floating decimal (• DT – date 	
Field Length	The recommended number of places the value of a data element would require.	
Definition	The NCES description of the NCES Element.	
NCES Option Set		

The NCES Handbook screen provides functions to:

- Select and view an NCES Handbook entry,
- Print the selected NCES Handbook entry, and
- View one or all NCES Handbook entries in a Data Grid.

Screen Layout & Description

When you select NCES Handbook on the second-tier upper menu bar, the following screen is returned.

Figure 70 - Element NCES Handbook Screen

The screen includes fields associated with the selected NCES Element. This screen is to display NCES Element characteristics, so all screen items other than the NCES Element may be considered optional.

Component Metadata – Elements – NCES Handbook Information		
Screen Item	Definition	Optional(O)/ Required(R)
NCES Element	The name by which the NCES Handbook element is identified.	
Element Number	The NCES Handbook element number for the elements.	
Definition	The definition for the NCES Handbook element.	

Element Type	The NCES data type associated to the item: <ul style="list-style-type: none"> • Date - (DT, in the NCES Handbook) • Alphanumeric – (AN) letter or number or combination of letters and numbers • ID – a code set of related options • N – number (whole number) • R - floating point decimal (decimal expected in the numeric value) 	
Field Length	The length of the NCES Handbook element, if it is defined.	
NCES Option Set	The NCES Option Set which contains the list of valid values for the element.	
NCES Related Categories	The Option Set which contains the list of valid values for the field	

View an NCES Element Entry

To view an NCES Handbook Element entry, use the following steps.

1. Select the NCES Element for viewing by scrolling the drop-down list in the NCES Element box. Click on the entry.
2. The window will refresh to present the information associated with that NCES Element.

Print an NCES Element Entry

To print an NCES Handbook Element entry, use the following steps.

1. Select the NCES Element for viewing by scrolling the drop-down list in the NCES Element box. Click on the entry.
2. The window will refresh to present the information associated with that NCES Element.
3. To print the entry that is displayed, select "Print" button at the bottom of the screen.

View the NCES Elements in a Data Grid

You can use the NCES Handbook Data Grid view to locate and select an NCES Element entry for editing or for deletion. The Data Grid view also provides download capability.

1. Select the NCES Element to be displayed in the Data Grid view by clicking on the entry in the "NCES Element" drop-down list, or leave the NCES Element blank to return the complete list of NCES Handbook entries.
2. Click on the "Data Grid View" button at the bottom of the screen.
3. The "NCES Handbook" screen displays the NCES Element entry (or entries).

April 2014

Page Size: 50

Edit	Remove	NCES Element Name	Definition	NCES Element Type	Field Length	NCES Optionset Name
		0010-Accountability Focus	A description of the educational unit under evaluation for accountability.	5	60	testApp
		0070-Assignment Due Date	The month, day, and year that the assignment is due. The month, day, and year on which a migrant student last moved, based on the Certificate of	2	8	
		0594-Migrant Last Qualifying Move (LQM) Date		3	4	

Best viewed in 1024*768 resolution

Figure 71 - NCES Handbook Data Grid View

4. Use scroll bars on right and at bottom of the table to view all columns and rows.
5. NCES Handbook entries can be downloaded, using the "Download" button at the bottom of the screen.

For additional detail, see "Data Grid View" section under General Features

Elements → NCES Handbook → Map to NCES

The Map to NCES screen documents the relationships between an Element and the NCES Handbook Element.

NCES Handbook element definitions and option sets are a resource to assist education organizations with data collection. Handbook entries include data element names, definitions, and option sets, which are organized and categorized for search and retrieval. NCES Handbook elements are frequently referenced in the SIF Association specification.

By documenting relationships of your data dictionary entries to NCES Handbook elements, the clients using your dictionary can review your dictionary element name, definition, and option set against the selected entry from the Handbook.

NOTE: NCES Handbooks elements, definitions, and option sets are updated periodically. The Element linked to a specific version of the NCES Handbook element entry. Updates to Handbook entries and to your Element entries are tagged with a version and an effective date.

Screen Layout & Description

When you select "Map to NCES," (a drop-down from the NCES Handbook) on the second-tier menu bar, the following screen is returned.

The screenshot displays the 'Map to NCES' interface. At the top, there's a navigation bar with tabs like 'Collections', 'Repositories', 'Outputs and Reports', 'Elements', 'Option Sets', 'Search', 'Support', 'CourseWalk™', and 'System Administration'. Below this, a breadcrumb trail shows 'Home > Elements > NCES Mapping > Map to NCES'. The main form area includes a 'Search Dictionary' section with a search button. A list of 'Dictionary Element' entries is shown on the left, with '4-yr Olds Program-V1(n)' selected. The right side of the form contains fields for 'Dictionary Element Name' (4-yr Olds Program), 'Dictionary Element Description', and several NCES-related fields: 'NCES Domain Name', 'NCES Section Name', 'NCES Category Name', 'NCES Element ID*', 'NCES Element Name' (Accountability Focus), and 'NCES Element Description' (A description of the educational unit under evaluation for accountability). At the bottom right, there are buttons for 'Data Grid View', 'UnMap', 'Map Item', and 'Cancel'.

Figure 72 - Elements Map to NCES Screen

Included on the screen are Dictionary Element Name and Description, the selections to categorize an element (NCES Domain, Section and Category), and NCES Element (ID, Name, and Description).

These fields are defined in the following table.

Component Metadata – Element – Map to NCES		
Screen Item	Definition	Optional(O)/Required
Search Dictionary	Box to enter search term to search dictionary element names.	O
Dictionary Element	Display area to display list of Element Names for selection.	O
Dictionary Element Name	The Element Name for the selected element.	O
Dictionary Element Description	The Definition of the selected element.	O
NCES Domain Name *	<p>The name of the highest level of hierarchy for grouping or organizing NCES Handbook entries. NCES Handbook domains include:</p> <ul style="list-style-type: none"> • State Education Agency, • Intermediate Educational Unit, • Local Education Agency, • School, • Class, • Student, • Staff 	O
NCES Section Name	The name of the second level of the hierarchy for organizing NCES Handbook entries. Domains include sections. Examples of sections for organizations include: Institution Identification, Governance, Program, and Accountability. Examples of sections for the Student domain include: Personal Identification, Enrollment, and School Participation and Activities.	O
NCES Category Name	The name of the third level of hierarchy for group of data elements that are related within a given section. Examples of categories include: Activity Information, Honors Information, and Post-School Education/Training.	O
NCES Element ID *	The NCES Element Number assigned to the selected NCES Handbook Element.	R
NCES Element Name	The NCES Element Name that identifies the NCES Handbook Element.	O
NCES Element Description	The NCES Element Definition for the selected NCES Handbook Element.	O

Screen Functionality & Navigation – Element – Map to NCES

You can view and manage the mapping of an Element entry to an NCES Handbook Element. The Map to NCES form supports the following actions for the selected Element:

- Select “Active Only” Filter to View All Elements or to View Only Active Elements,
- Search Element entries
- Map (link) an Element to an NCES Handbook Element,
- Un-map (remove the link between) an Element and an NCES Handbook Element, and



- View Elements to NCES Handbook Elements Mapping Data Grid.

Select “Active Only” Filter to View All Elements or to View Only Active Elements

The “Active Only” check box controls whether all Elements are shown or only the active Elements are listed in the Dictionary Element box on the left side of the screen. The default is to view active Elements only. When you need to look at a non-active Elements, you uncheck “Active Only” and the window will refresh with a list of all Elements.

An Element is “active” as long as its “Expiration Date” has not passed. Once the “Expiration Date” is reached, an Output is considered “Inactive.”

Search Element Entries

To locate Element entries, use the following steps.

1. Enter the search term in “Search Dictionary” box in the upper left of the screen.
2. Click “Search”.
3. The Element Names identified by the search are listed in the “Dictionary Element” box, on the left side of the screen.

Map an Element to an NCES Handbook Element

Element Names are displayed in the “Dictionary Element” box on upper left of the screen. This box includes a scroll bar on the right for you to scroll up or down to view additional entries.

1. Select the Element within the “Dictionary Element” box by clicking on the entry. (Use “Search Dictionary” if needed to locate the item.)
2. The screen refreshes. Elements Names are shown in the “Dictionary Element” box (Upper left on screen).
3. Select the Element to be linked by clicking on the name within the box.
4. The screen refreshes and the selected Element Name and Definition is displayed in the “Dictionary Element Name” and “Dictionary Element Description” boxes.
5. Locate the NCES Element information for mapping. You can narrow the selections in the “NCES Element Name” box by selecting the NCES Domain Name, NCES Section Name, and/or NCES Category Name. Each choice will further limit the “NCES Element Names” in the drop-down box. Otherwise, you can scroll through the drop-down list in NCES Element Name to select the NCES Handbook element. Click on the NCES Element Name to select it.
6. The NCES Element Name selection provides the NCES Element ID (the required field for the mapping) and displays the Handbook definition in the NCES Element Description field.
7. Click on “Map Item” button on the bottom button bar.
8. The mapping is stored in the database, and the Dictionary Element list entry for the Element now includes an “(m)” at the end of the name, indicating that the element is mapped.

Un-map an Element and an NCES Handbook Element

To Un-map (remove the links between) an Element and an NCES Handbook Element, complete the following steps.

1. Select the Element entry to be un-mapped in the Dictionary Element box at the top left of the screen. Mouse over the item and click to select it.
2. The screen will refresh to display data for the selected Element, and the “Un-map” button is included on the bottom button bar.



Figure 73 - Element Map to NCES Bottom Button Bar

3. Click the “Un-map” button.
4. The mapping is removed. The screen refreshes, and the Dictionary Element entry no longer indicates that the element is mapped.

View Elements to NCES Handbook Elements Mapping Data Grid

You can use the NCES Mapping Data Grid view to locate and select an Element mapping entry for editing or for deletion. The Data Grid view also provides download capability.

1. From the NCES Mapping screen, select the Element to be displayed in the Data Grid view by clicking on the entry in the “Element Name” drop-down list, or leave the Element Name blank to return the complete list of Element entries.
2. Click on the “Data Grid View” button at the bottom of the screen.
3. The “NCES Mapping” Data Grid screen displays the Element entry (or entries).
4. Use scroll bars on right and at bottom of the table to view all columns and rows.
5. Element entries can be edited or removed, using EDIT or REMOVE buttons available on each entry.

For additional detail, see “Data Grid View” section under General Features

To view the data grid for the Map to NCES entry or entries, the following steps can be used.

Elements → Categorize

As an enterprise data dictionary grows, and as the elements list is used by various groups, there is increasing value in “categorizing” elements to assist in locating related elements, or to focus on elements that relate to a specific hierarchy or group.

In recognition of this need, DataSpecs includes capabilities to assign data dictionary Elements to a hierarchy, and to tailor the hierarchy or grouping to your needs.

DataSpecs Categorize functionality is presented using a hierarchy or categorization structure similar to that in the NCES Handbooks. The DataSpecs hierarchy includes “Domains,” “Sections,” and “Categories.”

“Domains” are the highest level of the element hierarchy. Domains include: Student, Staff, Class, School, Local Education Agency (LEA), Intermediate Education Unit (IEO), and State Education Agency (SEA).

As an illustration, “Sections” identified for the Student domain include: Personal Information, Enrollment, School Participation and Activities, Assessment, Discipline, Special Program Participation and Student Support, Non-School and Post-School Experiences, Transportation, Food Services, and Health Conditions.

And, at the lowest level of the hierarchy, the “Categories” list within Student/Personal Information includes groups titled: Name, Background, Family Information, and Address/Contact Information.

Within the hierarchies there are similarities between both student and staff, because both domains include the same elements about persons.

NCES Handbook element definitions and option sets are a resource to assist education organizations with data collection. Handbook entries include data element names, definitions, and option sets, which are organized and categorized for search and retrieval. NCES Handbook elements are frequently referenced in the SIF Association specification.

By documenting relationships of your data dictionary entries to NCES Handbook elements, the clients using your dictionary can review your dictionary element name, definition, and option set against the selected entry from the Handbook.

NCES Handbooks elements, definitions, and option sets are updated periodically. Updates to Handbook entries are tagged with a version and an effective date to identify the specific instance of a Handbook element entry.

CONTINUE HERE

Option Sets

Option Sets Functionality

DataSpecs functionality supports the Data Inventory steps:

1. Load initial **Option Sets** and **Options** (code sets) as required for Data Dictionary Elements.
2. Relate Collection Items to available Option Sets, adding Option Sets and Options as needed. (Note that specific option sets may be referenced directly by a Collection Data Item.)
3. Relate Option Set Fields to available Option Sets, adding Option Sets and Options as needed.
4. Relate Option Set/Report Items to available Option Sets, adding Option Sets and Options as needed.

(The complete list of DataSpecs steps is included in the Introduction to DataSpecs.)

You can access the Option Sets functionality through the second-level navigation bar at the top of the DataSpecs screen. The navigation bar components for Option Sets/Reports include:

- Option Sets and
- Options.

These components support the entry, import (upload), and download of the data inventory entries for Option Sets and Options. Reports on Option Sets are available through the DataSpecs Report facility.

Option Sets→Option Sets

The Option Sets selection supports documentation about the option sets or code lists.

The screen operation requires that you create a new Option Set entry, or select an Option Set entry that has already been created. When there are Options that are associated with the selected Option Set, the Option entries are listed in the "Code/Option" Box on the left side of the screen.

Option Sets may be linked with Collection Items, Option Set Fields, Option Sets/Reports Items, and with Elements. You should check that links are updated when creating new versions of Option Sets. Links to "expired" Option Sets are not automatically associated to the new version of the Option Set.

Option Set Screen Layout & Description

The following screen is returned when you select "Option Sets" on the top-tier DataSpecs menu bar and "Option Sets" on the second-tier menu bar.

Figure 74 - Option Sets screen

The groupings of data on the Option Sets screen include: Basic Information, the Code/Option Box, and History Tracking. When an Option Set entry is selected, the information about that entry is displayed in the Basic Information and History Tracking areas. Option entries that are already associated with the selected Option Set are listed in the Code/Option window on the left side of the screen when the Option Set information is displayed. Code/Option fields are defined in the Option Sets section of this Chapter.

The fields within the Option Set components are defined in the tables that follow, and each field is identified as either Required or Optional.

Component Metadata – Option Sets Basic Information		
Screen Item	Definition	Optional(O)/ Required(R)
Option Set Name	A unique name or title that represents a defined option set.	
External Source	The name of an external source that defines the contents of this option set. For example, School ID numbers are often maintained in a database table which is continually maintained, and would not necessarily be loaded (duplicated) in the DataSpecs Options list for the School ID Option Set.	
Parent	The name of the immediate parent option set in the hierarchy for an option set that is a subset within an option set hierarchy. For example, the option set “Primary grade codes” (grades K-3) are a subset of the option set for “Elementary Grade Codes,” which are a subset of the “Master” option set of “All Grade Codes”.	
Master	The name of the top level option set in the hierarchy for an option set that is a subset within an option set hierarchy. For example, the option set “Primary grade codes” (grades K-3) are a subset of the option set for “Elementary Grade Codes,” which are a subset of the “Master” option set of “All Grade Codes.”.	
Change Type	The type of change, when a code set has changed to a newer version. The selections include: extension, restriction, summary, consolidation, or copy. The choices in this list can be modified by the DataSpecs system administrator.	

History Tracking		
Screen Item	Definition	Optional(O)/ Required(R)
Effective Date	The date that the table with the specific attributes will be (or was) effective.	R
Expiration Date	The date that the table with the specific attributes will be (or was) expired.	O
Version	The version of the repository table description.	R

Screen Functionality & Navigation –Option Sets

The Option Sets screen provides functions to:

- Select “Active Only” Filter to View All Option Set entries or to View Only Active Option Sets
- Add Option Set entries,
- Update or Edit an Option Set entry,
- View the Option Set Data Grid, and
- Remove an Option Set entry.

“Active Only” Filter to View All Option Sets or to View Only Active Option Sets

The “Active Only” check box controls whether all Option Set entries are shown or only the active Option Sets are listed in the Option Set Name drop-down box. The default is to view active Option Sets only.

When you need to look at a non-active Option Set, you uncheck “Active Only” and the window will refresh with a list of all Option Sets in the system.

An Option Set is active as long as its “Expiration Date” has not passed. Once the “Expiration Date” is reached, an Option Set is considered “Inactive”.

Entering and Editing Option Set Data

When entering Option Set data, various fields may be edited by the following methods:

- Enter data directly into an editable field.
- Select a predefined choice from the drop-down list.
- Click on the checkbox or radio button.
- Click on the Calendar icon to specify a date for a date field or type the date.

The fields “Responsible Office” and “Contacts” may either be selected from the list of “People” or “Offices” or they may be new entries that are added to “People” or “Offices” lists. Information in both fields may be managed directly using SUPPORT->Offices or SUPPORT->People.

Add an Option Set Entry

To create/add a new Option Set entry, click on the “Add Option Set” button at the bottom of the screen. The “Create Options” pop-up screen will be returned. This screen provides selection of a Create Option for a new Option Set entry, including:

- Add New
- New from Copy
- New Version
- Import

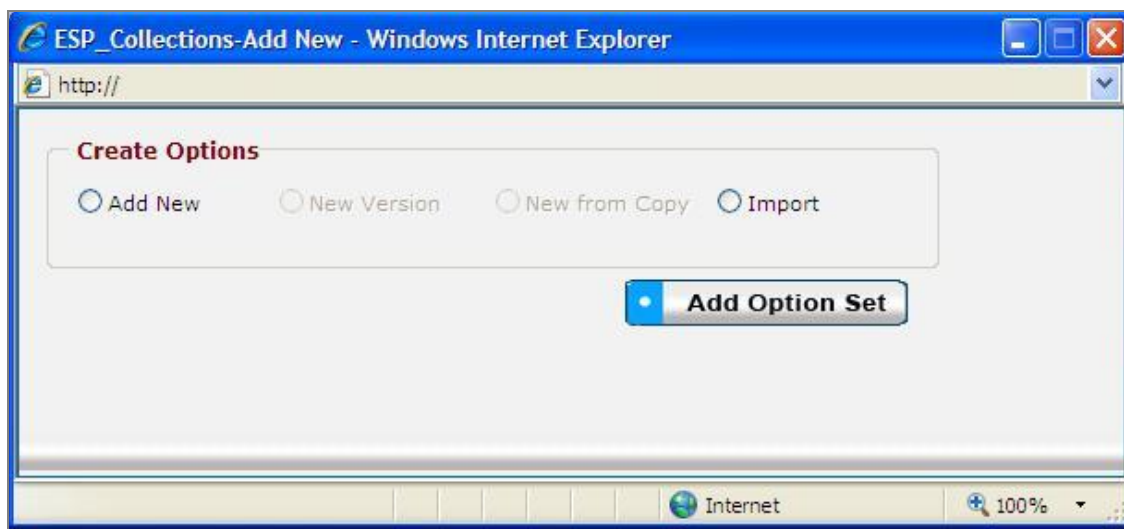


Figure 75 - Option Set Create Options Pop-up Window

“Add New,” “New Version,” and “New from Copy” selections each support entering or creating a single Option Set entry. The “Import” selection supports loading one or more Option Set entries.

- **Add New**

1. Click on the “Add New” radio button, and select “Add Option Set” button in the Create Options pop-up window.

April 2014

2. Enter the required fields – Option Set Name, Effective Date, and Version. “Version” will have the default value of 1.
3. Enter other fields, as desired.
4. When the entry is complete, click on the “Save” button at the bottom of the Option Sets and Reports screen to store the Option Set entry.

• New Copy

(The “New Copy” radio button is activated when an option set is chosen.)

Note: You can use New from Copy when an existing Option Set entry has minor changes, like the relationship to a master Option Set is being added.

1. First, choose the Option Set entry that you want to copy from the “Option Set Name” drop-down list.
2. Click the “Add Option Set” button at the bottom of the screen.
3. The “Create Options” pop-up window is returned.
4. Use the “New from Copy” radio button in the “Create Options” pop-up window, and then click “Add Item” button.
5. The Option Set New Name pop-up window is presented.

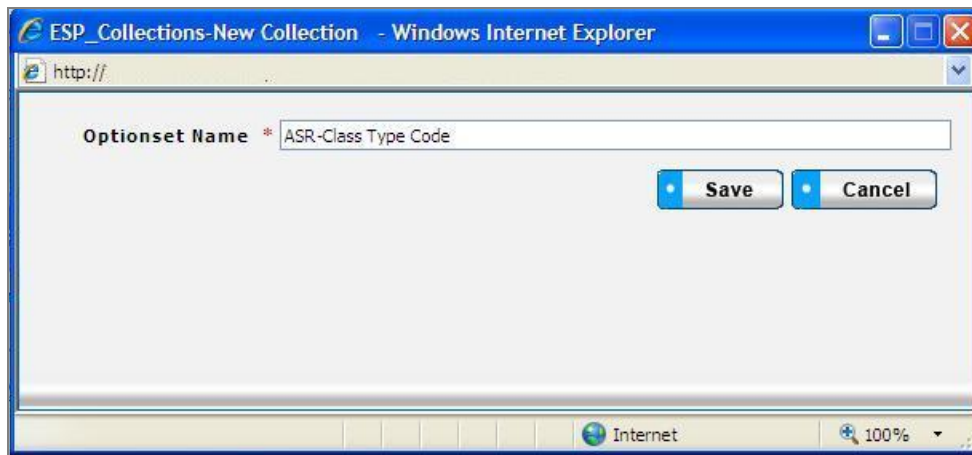


Figure 76 - Option Set New Name Pop-up Window

6. Enter the new Option Set Name, and click the “Save” button.
7. The Option Sets screen is presented with the new name and the other fields duplicated from the selected Option Set.
8. Update the information, as appropriate.
9. Click on the “Save” button at the bottom of the screen to store the new Option Set entry.
10. The Option Set entry will be saved and the screen refreshed.

• New Version

(The “New Version” radio button is activated when an option set is chosen.)

Note: This selection would typically be used when an existing Option Set entry has minor modifications like a change in the external source. Entries are unique when effective date and/or version number are different. Versioning helps to maintain information on current repositories and their attributes, as well as past and future repositories..

1. Select the Option Set entry that you want to copy in the "Option Set Name" drop-down list.
2. Click the "Add Option Set" button at the bottom of the screen.
3. The "Create Options" pop-up window is returned.
4. Use the "New Version" radio button in the "Create Options" pop-up window, and then click "Add Item" button.
5. The Option Set screen is refreshed showing the selected entry. The "Version" field is incremented. The new version number is also displayed in the Option Set Name field where the version number is appended to the repository name (for example "Course Code – V2"). The earlier Option Set entry is updated with today's date in the expiration field, tagging that entry as "expired."
6. Enter or change the remaining Option Set information as appropriate.
7. When changes are completed, click on the "Save" button at the bottom of the screen.
8. The data will be saved and the screen refreshed showing the new Option Set version entry.

• Import

Note: This option would typically be used when you have a file or can create a file with one or more repository entries.

1. Click on the "Add Option Set" button at the bottom of the screen.
2. The "Create Options" pop-up window is displayed.
3. Click the "Import" radio button, and then hit the "Add Item" button in the window.
4. The Option Set Upload screen is returned.

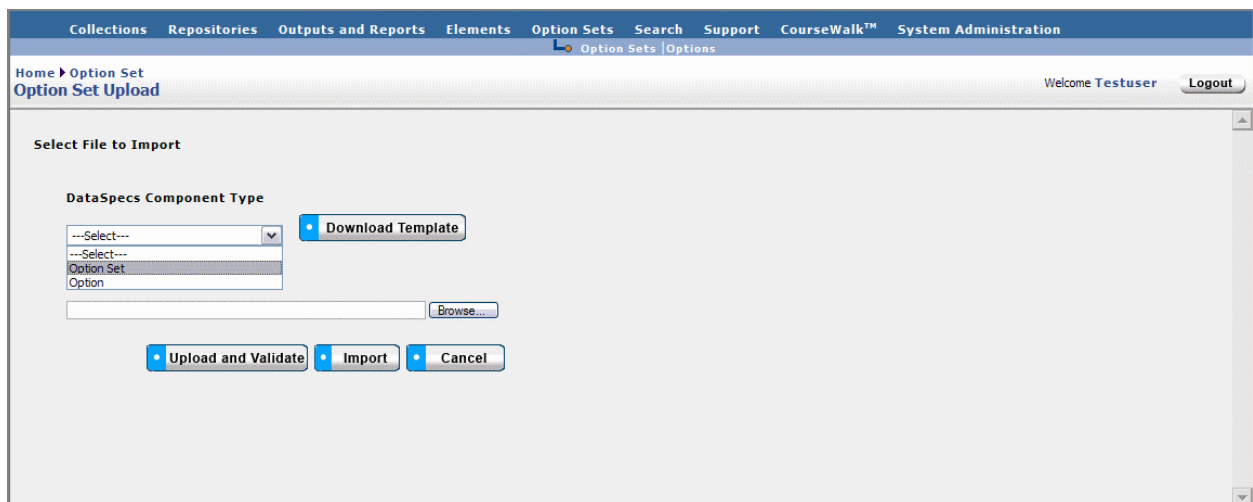


Figure 77 - Option Set Upload Import Screen

5. If you require a copy of the Option Set template, select "Option Set" in the "DataSpecs Component Type" drop-down box (as shown in image above), and then click on the "Download Template" button. The File Download screen allows you to save the "OptionSets.xls" template file or to open it. (NOTE: DataSpecs uses EXCEL 97-2003 Workbook file format for this purpose.)
6. Load or enter the information that you want to import into DataSpecs in the template rows. (Each Option Set entry is entered as a separate row.) Save the EXCEL file with a unique filename.
7. Return to the DataSpecs Option Set Upload screen.
8. Choose "Option Set" in the "DataSpecs Component Type" drop-down box.
9. Either browse to locate the name of the "File to Import" or enter the directory and file name information for the file to be loaded.

10. Click the "Upload and Validate" button.
11. If there are errors in the Import file, Violations message(s) will be displayed. You can print the error message or Print or Save the Violation spreadsheet.
12. Correct any errors in the file. Save the corrected file. Return to step 7.
13. When the DataSpecs message "No violation occurs, please click on upload" is returned, respond "OK" button on the message screen.
14. Click on the "Upload" button.
15. A "Success" screen is displayed with a count of the Option Set entries that were loaded.



Figure 78 - Option Set Upload Success Pop-up Window

16. Selections from the Upload Success screen allow you to
 - a. "Download" – download the successfully loaded Option Set entries,
 - b. "Upload More" – return to the Option Set Upload screen, or
 - c. "Go to Form" – go to the Option Set screen.
17. Select one of the buttons, and proceed.

Edit an Option Set Entry

To edit an Option Set entry, use the following steps:

1. Select the Option Set entry to be edited from the "Option Set Name" drop-down list.
2. The window refreshes and displays the selected Option Set entry.
3. Click on "Edit" (in blue) to the right of the "Option Set Name" box.
4. Modify the Option Set entry as needed.
5. Save the updated Option Set by clicking on the "Save" button at the bottom of the window.

Remove an Option Set Entry

You can delete an Option Set entry, as follows:

1. Select the Option Set entry for deletion in the "Option Set Name" drop-down list. When the entry is selected, the screen will refresh and display the information for the selected entry.
2. Click the "Remove Option Set" button on the bottom of the screen. (The "Remove Option Set" button is displayed only when an Option Set has been selected.)



Figure 79 - Expanded Option Set Button Bar

3. A pop-up window requires that you confirm the deletion.



Figure 80 - Deletion Confirmation Pop-up Window

4. Click "OK" to confirm the deletion.
5. The window will refresh to a blank Option Set screen.

View Option Set Data Grid

The Data Grid view of Option Set is available by clicking on the "Data Grid View" button at the bottom of the Option Set screen. You can browse Option Set entries, edit an Option Set entry, delete an entry, or download the Option Set data. For further detail see "[Data Grid View](#)" section under General Features.

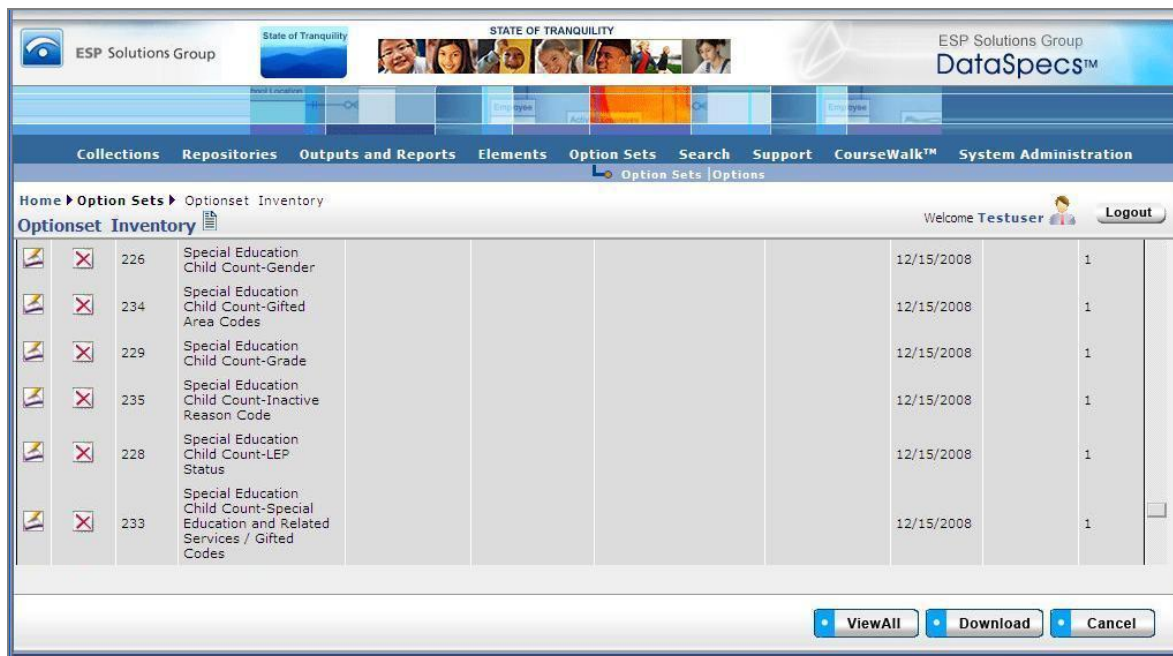


Figure 81 - Option Set Data Grid View Screen

Option Sets→Options

The Options selection supports documentation about the options or codes and with their association to Option Sets. The screen provides functionalities to:

The screen operation requires that you create a new Option Set entry, or select an Option Set entry that has already been created. When there are Options that are associated with the selected Option Set, the Option entries are listed in the “Code/Option” Box on the left side of the screen.

Options are linked with Option Sets. You should check that links are updated when creating new versions of Options. Links to “expired” Options are not automatically associated to the new version of the Option.

Options Screen Layout & Description

When you select “Option Sets” on the top-tier DataSpecs menu bar and “Options” on the second-tier menu bar, the following screen is returned.

Figure 82 - Options screen

The groupings of data on the Options screen include: Basic Information, the Options Box, and History Tracking. An Option must be associated with an Option Set entry. When an Option Set entry is selected, the name of that Option Set is displayed in the Option Set Name box, and Options which are associated with the Option Set are listed in the Options window on the left side of the screen. When an Option is selected, the fields for that Option are displayed in Basic Information and History Tracking areas. Option Set fields are defined in the Option Sets section of this Chapter.

The fields within the Option components are defined in the tables that follow, and each field is identified as either Required or Optional.

Component Metadata – Option Sets - Options Basic Information		
Screen Item	Definition	Optional(O)/ Required(R)
Option	A unique name or title that represents a specific Option or code.	R
Code	The code that is stored to represent this Option.	O
Rank	An alternative sorting order for the Option within the Option Set.	O
Short Name	A short name for the Option.	O
Source	A reference to an external source that controls the Option.	O
Definition	A description of the meaning of the Option.	O

History Tracking		
Screen Item	Definition	Optional(O)/ Required(R)
Effective Date	The date that the table with the specific attributes will be (or was) effective.	R
Expiration Date	The date that the table with the specific attributes will be (or was) expired.	O
Version	The version of the repository table description.	R

Screen Functionality & Navigation –Options

- Select “Active Only” Filter to View All Option entries or to View Only Active Options
- Add Option entries,
- Update or Edit an Option entry,
- View the Option Data Grid, and
- Remove an Option entry.

“Active Only” Filter to View All Options or to View Only Active Options

The “Active Only” check box controls whether all Options and Option Set entries are shown or only the active Options and Option Sets are listed in the Options box and the Option Set Name drop-down box. The default is to view active Options and Option Sets only. When you need to look at a non-active Options or Option Sets, you uncheck “Active Only” and the window will refresh with a list of all entries in the system.

An Option is active as long as its “Expiration Date” has not passed. Once the “Expiration Date” is reached, an Option is considered “Inactive”.

Entering and Editing Option Data

When entering Option data, various fields may be edited by the following methods:

- Enter data directly into an editable field.
- Select a predefined choice from the drop-down list.
- Click on the checkbox or radio button.

- Click on the Calendar icon to specify a date for a date field or type the date.

Add an Option Entry

To create/add a new Option entry, use the following steps:

1. Select the appropriate Option Set Name in the drop-down box.
2. The screen refreshes to display the name of the Option Set and the codes and names of any Options that may already be associated with the Option Set.
3. Click on the "Add Option" button at the bottom left of the screen, below the Options box.
4. The screen is refreshed to clear the Basic Information, and insert today's date in the Effective Date field, with Version number preset as 1.
5. Enter the required fields – Option, and Effective Date. "Version" will have the default value of 1.
6. Enter other fields, as desired.
7. When the entry is complete, click on the "Save" button at the bottom of the Options screen to store the Option entry.
8. The name of the new Option is displayed in the Options box.

Import

This option would typically be used to migrate or move a large set of data from an existing environment into DataSpecs. This option requires that you have a file or create a file with one or more Option entries.

1. Click the "Import" button at the bottom of the screen.
2. The "Option Set Upload" window is displayed.

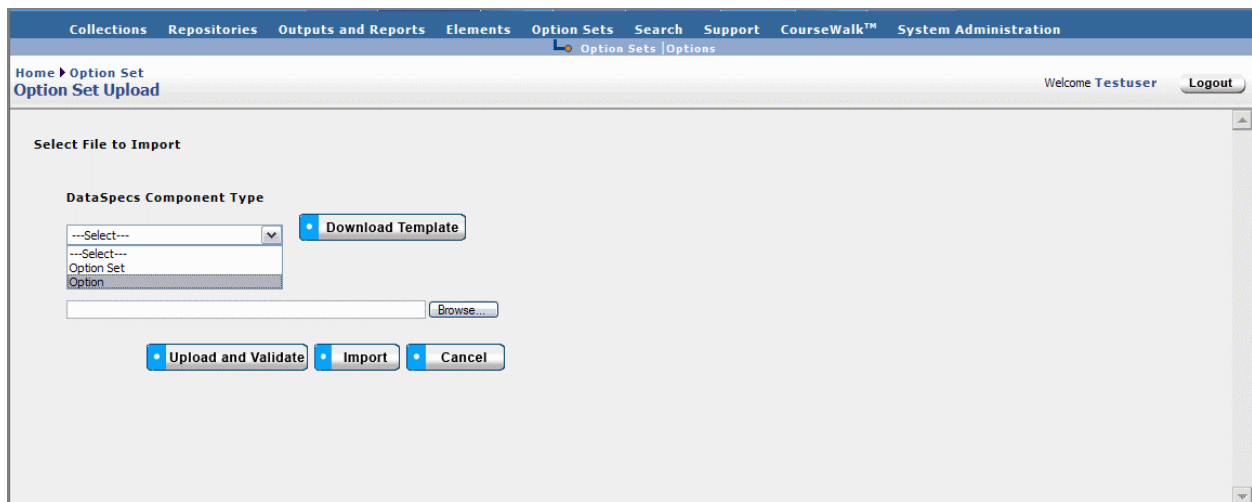


Figure 83 - Option Set Upload Import Screen

3. If you need a copy of the Option template, select "Option" in the "DataSpecs Component Type" drop-down box (as shown in image above), and then click on the "Download Template" button. The File Download screen allows you to save the "OptionSetValidValues.xls" file or to open it. (NOTE: DataSpecs uses EXCEL 97-2003 Workbook file format for this purpose.)
4. Load or enter the information that you want to import into DataSpecs in the template rows. (Each Option Set entry is entered as a separate row.) Save the EXCEL file with a unique filename.
5. Return to the DataSpecs Option Set Upload screen.

6. Choose "Option" in the "DataSpecs Component Type" drop-down box.
7. Either browse to locate the name of the "File to Import" or enter the directory and file name information for the file to be loaded.
8. Click the "Upload and Validate" button.
9. If there are errors in the import file, Violations message(s) will be displayed. You can print the error message or Print or Save the Violation spreadsheet.
10. Correct any errors in the file. Save the corrected file. Return to step 5 above.
11. When the DataSpecs message "No violation occurs, please click on upload" is returned, respond "OK" button on the message screen.
12. Click on the "Upload" button.
13. A "Success" screen is displayed with a count of the Option Set entries that were loaded.

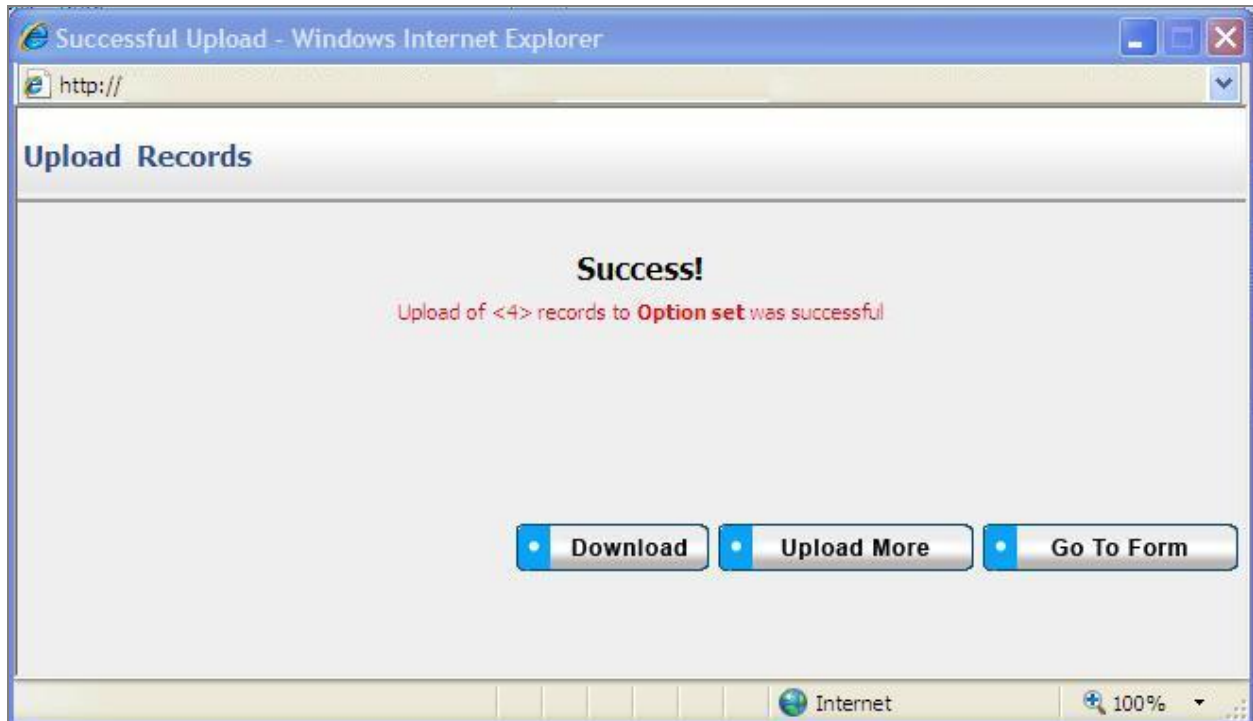


Figure 84 - Option Upload Success Pop-up Window

14. Selections from the Upload Records screen allow you to
 - a. "Download" – download the successfully loaded Option entries,
 - b. "Upload More" – return to the Option Upload screen, or
 - c. "Go to Form" – go to the Option screen.
15. Select one of the buttons, and proceed.

Edit an Option Entry

To edit an Option entry, use the following steps:

1. Select the appropriate Option Set Name in the drop-down box.
2. The screen refreshes to display the name of the Option Set and the codes and names of any Options that may already be associated with the Option Set.
3. Click on the Option or Option Code in the Options box on the left side of the screen to select the entry.
4. The window refreshes and displays the selected Option entry in the Basic Information and History Tracking areas of the screen.

April 2014

5. Modify the Option entry as needed.
6. Save the updated Option by clicking on the "Save" button at the bottom of the window.

Remove an Option Entry

You can delete an Option Set entry, as follows:

1. Select the Option Set Name in the drop-down box at the top left side of the screen.
2. The screen refreshes to display the name of the Option Set and the Option codes and names of the Options that are associated with the Option Set.
3. Select the Option entry for deletion in the "Options" box on the left side of the screen. When the entry is selected, the screen will refresh and display the information for the selected Option entry.
4. Click the "Remove Option" button on the bottom left side of the screen. (The "Remove Option" button is displayed only when an Option Set has been selected.)

The screenshot shows the DataSpecs web application interface. At the top, there's a header with the ESP Solutions Group logo and 'DataSpecs™'. Below the header is a navigation bar with tabs: Collections, Repositories, Outputs and Reports, Elements, Option Sets, Search, Support, CourseWalk™, and System Administration. The main content area is titled 'Home > Option Sets > EnrollmentTypeCode-V1 > Concurrent'. On the left, there's a section 'Options' with a table listing options: 'C Concurrent-V1' and 'H Main-V1'. The 'C Concurrent-V1' option is selected. Below the table are buttons for 'Add Option' and 'Remove Option'. The 'Remove Option' button is highlighted. On the right, there's a 'Basic Information' section with fields for 'Option*', 'Code', 'Rank', 'Short Name', 'Source', 'Definition', and 'Local ID'. Below that is a 'History Tracking' section with fields for 'Effective Date*', 'Expiration Date', and 'Version*'. At the bottom right, there are buttons for 'Import', 'Data Grid View', 'Save', and 'Cancel'.

Figure 85 - Option Screen with Remove Option Button

5. A pop-up window requires that you confirm the deletion.

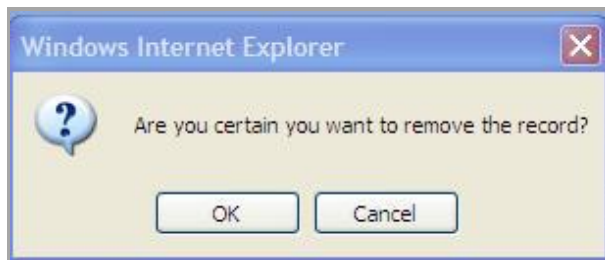


Figure 86 - Option Deletion Confirmation Pop-up Window

6. Click "OK" to confirm the deletion.
7. The screen will refresh to display the Option Set and Options.

April 2014

View Option Data Grid

The Data Grid view for Options is available by clicking on the “Data Grid View” button at the bottom of the Option screen. You can browse Option entries, edit an Option entry, delete an entry, or download the Option data.

For further detail see “[Data Grid View](#)” section under General Features.

Edit	Remove	Option Set ID	Local ID	Option	Option Set	Default Code	Short Name	Rank	Source	Effective Date	Expiration Date	Version
		507		Concurrent-V1	EnrollmentTypeCode-V1	C		1		05/14/2008		1

Figure 87 - Option Data Grid View Screen

Search

DataSpecs has a search engine that allows the user to look for Collection Items, Collections, Data Dictionary Elements, Offices, Options, Option Sets, Output Items, Outputs, People, Repositories, Repository Table Fields, or Repository Tables by selecting a word or words contained in the desired section. To use the search engine, select the Search Function under the word Search on the upper tool bar. In the box on the left hand side of the screen, enter the word or words you want to use in your search. On the right hand side of the screen, select the type of item you are seeking from the pull-down list and click on the arrow to move that item to the list box on the right hand side. You may select more than one type of item to search on at the same time. The left arrow allows you to unselect an item for the search.

April 2014

Figure 88 - Search Screen

DataSpecs searches the database to find the desired information, and provides a list.

SNO	Name	Component	Parent Object
1	Vocational Student Information	Collections	
2	Applied Student and Course Information	Collections	
3	Student Price Waivers Criteria	Collections	
4	Request for Approval of Placement of Exceptional Students	Collections	
5	Report of Services to Students with Disabilities Part I	Collections	
6	Report of Services to Students with Disabilities Part II	Collections	
7	Request for Subsidy Allocation of Tuition & Board for Students with Disabilities	Collections	
8	Transportation Data for Out-Of-District Special Education, Homeless, and Career & Technical Education Students	Collections	
9	HEDHS Student Data Collection	Collections	
10	Private School-October 1st Resident Enrollment	Collections	

Figure 89 - Search Results Screen

April 2014

To get a detailed report about an item on the list, click on the name of the item.

The screenshot displays the 'Vocational Student Information-V1' collection details in the DataSpecs application. The interface includes a top navigation bar with links like 'Collections', 'Repositories', and 'Outputs and Reports'. The main content area is divided into several sections: 'Basic Information' (with fields for Collection Name, Number, Set, Status, Abstract, and Mandate), 'Ownership' (with fields for Collection Steward, Responsible Office, Phone, Extension, and Email), 'Collection Characteristics' (with dropdowns for Collection Type, Detail Level, Collection Method, Required, Privacy Restriction, and Target Audience), 'Collection Cycle' (with fields for Periodicity and Month Collected), and 'History Tracking' (with fields for Effective Date, Expiration Date, and Version). At the bottom, there are buttons for 'Data Grid View', 'File Specs Report', 'Add Collection', 'Remove Collection', 'Collection Details Report', 'Save', and 'Cancel'.

Figure 90 - Search Result Selected Screen

Support

The Support section of DataSpecs has four components:

- Glossary
- Offices
- People
- Data Dictionary Creation

Glossary

The Glossary section has a list of defined terms used in DataSpecs. If you click on a word in the list to the left, you will get the name of the term, the definition, and a discussion of the meaning of the term, particularly if it is unique to education data. If you want to add additional terms to the glossary, you may do that from this screen by clicking on Add Entry. DataSpecs will give you a screen into which you can add the name of a term, definition, and meaning, if needed. After you have entered the information, click on the Save button.

April 2014

Home ► Glossary ► Actionable Data

Glossary

Basic Information

Name*
Actionable Data

Definition
Information that can lead to change.

Meaning
The term actionable data arose because the proliferation of data became overwhelming and the use of data remained low. "Actionable" is earned by data when they inform a decision or action leading to change—or continuation of a successful process. For data to be actionable, they need to be presented in a

Figure 91 - Glossary Screen

Offices

The Offices section is the place where you can enter information about offices within your agency with responsibility for data collection and reporting. As with the Glossary, if you click on an office in the left hand list, the Basic Information will be populated with the Office, Office Phone number and Office Acronym, if they have been entered. From this screen you can import a list of Offices, Add an Office, Remove an Office, and go to a Data Grid View. If a new office is added, the Save button must be clicked.

Home ► Office ► test

State Office

Office

test
test 5.6.2.1+

Basic Information

Office* Office Phone Office Acronym

test

Figure 92 - Offices Screen

April 2014

People

Like Offices, the People section is where you can record information about the persons with responsibility for data collection or reporting. Often these people are called Data Stewards. The first name and last name are required. There is also space to insert Phone number, Extension, and E-Mail address. If you have entered a list of Offices, you will get a pull down list from which to choose.

The screenshot shows the 'People' section of the DataSpecs application. The top navigation bar includes 'Collections', 'Repositories', 'Outputs and Reports', 'Elements', 'Option Sets', 'Search', 'Support', 'CourseWalk™', and 'System Administration'. Below this, there are links for 'Glossary', 'Offices', 'People', and 'Data Dictionary Creation'. The user is logged in as 'Testuser'.

The main content area is titled 'People' and contains a list of existing people on the left: Bacon, Chris P; Banks, Robin; Bellum, Sarah; Bush, Rose; Claire, Heidi; Cross, Chris; Dewitt, Kenya; Dover, Eileen; Down, Neil; Early, Brighton; Hardy, Lauren; Howe, Annie; Mellon, Walter; Nominator, Lois D; O'Vera, Marge N; Shore, Rocky; and Tonin, Sara. Below the list are buttons for 'Add Person' and 'Remove Person'.

The 'Basic Information' form on the right includes fields for 'First Name*', 'Last Name*', 'Phone', 'Extension', 'E-Mail', and 'Office' (a dropdown menu). At the bottom of the form are buttons for 'Import', 'Data Grid View', 'Save', and 'Cancel'.

Figure 93 - People Screen

Mandate

A Mandate can be added to DataSpecs in the Mandate section. A Mandate is a description of the source of requirements for the collection and might include a legislative act, a section of law, administrative code or procedure, or local policy. The Mandate's name, effective date, and version are required fields. From this screen you can import a list of Mandates, Add a Mandate, Remove a Mandate, and go to a Data Grid View. If a new Mandate is added, the Save button must be clicked.

The screenshot shows the 'Mandate' section of the DataSpecs application. The top navigation bar is the same as in Figure 93. Below it, there are links for 'Glossary', 'Offices', 'People', 'Mandate', 'Mandate Type', and 'Mandate Level'. The user is logged in as 'Testuser'.

The main content area is titled 'Mandate' and includes a checkbox for 'Active Only'. Below this is a 'Mandate Selection' dropdown menu. The 'Basic Information' form includes fields for 'Name*', 'Mandate Type' (dropdown), 'Mandate Level' (dropdown), 'Description', and 'Reference'. The 'History Tracking' section includes fields for 'Effective Date * (MM/DD/YYYY)', 'Expiration Date (MM/DD/YYYY)', and 'Version *'. At the bottom of the form are buttons for 'Add', 'Data Grid View', 'Delete', 'Save', and 'Cancel'.

Figure 94 - Mandate Screen

April 2014

Mandate Type

A Mandate Type can be added to DataSpecs in the Mandate Type section. A Mandate Type can be linked to a mandate. From this screen you can Add a Mandate Type, Remove a Mandate Type, and go to the Data Grid View of the Mandate Types. The Mandate Type Name is required while the Description is optional.

Figure 95 - Mandate Type Screen

Mandate Level

A Mandate Level can be added to DataSpecs in the Mandate Level section. A Mandate Level can be linked to a mandate. From this screen you can Add a Mandate Level, Remove a Mandate Level, and go to the Data Grid View of the Mandate Levels. The Mandate Level Name is required while the Description is optional.

Figure 96 - Mandate Level Screen

CourseWalk™

CourseWalk™ is a tool that can be added on to your instance of DataSpecs. CourseWalk provides the capability to electronically link local course codes and descriptions to state or national course codes and state codes to the national codes. The national course coding structure is called School Codes for the Exchange of Data (SCED), and was developed by the U.S. Department of Education's National Center for Education Statistics (NCES) with input from state and local education agencies. The SCED codes cover 22 subject areas, and there are over 1350 individual courses. If you have contracted to use CourseWalk, you should see the CourseWalk User Guide Videos for instructions on how to use it.

April 2014

System Administration

System Administration has two components essential for maintaining DataSpecs:

- System Tables
- User Management

System Tables

System Tables contain the list of choices in dropdown menus. To revise these lists, go to the System Tables section and find the desired list. For most of the tables, you have the options of Edit, New, or Remove.

The screenshot displays the 'Edit System Tables' page in the DataSpecs System Administration interface. The page is organized into several sections, each with a dropdown menu and associated actions (Edit, New, Remove).

- Collections:** Includes dropdowns for Collection Set, Status, Collection Type, Detail Level, Collection Method, Required, Privacy Restriction, and Target Audience.
- Collection Item:** Includes a dropdown for Data Type.
- Repository:** Includes a dropdown for Repository Type.
- Repository Table:** Includes a dropdown for Table Type.
- Output And Reports:** Includes a dropdown for Media.
- Option Set:** Includes a dropdown for Change Type.
- Menu:** Includes checkboxes for Menu Items (Collection Cycles, SIF Mapping, Collection Level Rule) and a Save button.
- Download Templates:** Includes a dropdown for System Tables and a Download button.
- Element Categories:** Includes dropdowns for Domain Name, Section Name, Category Name, and NCES Element Type, each with an Edit button.

The interface also features a top navigation bar with links to Collections, Repositories, Outputs and Reports, Elements, Option Sets, Search, Support, CourseWalk™, and System Administration. A breadcrumb trail shows the path: Home > System Administrator > System Tables > Edit System Tables. A 'Welcome Testuser' message and a 'Logout' button are visible in the top right corner.

Figure 97 - System Administration Screen

The following system tables allow changes to be made.

- Collections
 - Collection Set
 - Status
 - Collection Type
 - Collection method
 - Required
 - Privacy Restrictions
- Collection Item
 - Data Type
- Repository
 - Repository Type
- Repository Table
 - Table Type
- Output and Reports
 - Media
- Option Set
 - Change Type
- Menu Items (Save if changes are made)
 - Collection Cycles (on, off)
 - SIF Mapping (on, off)
 - Collection Level Rule

Download Templates allows the user to get the template for a particular System Table.

Finally, Element Categories may be edited for NCES Handbook data elements. Those will be changed by ESP Solutions Group only if the Handbook undergoes a major renovation.

On the screen where editing, adding or removing occurs, you will be asked to Save or Cancel.

User Management

The final screen is where the System Administrator provides access to users. The information requested for each user is:

- First Name
- Last Name
- E-Mail Address
- Security Code – The options are:
 - Administrator – Person(s) in charge of the database
 - Authenticated – Person authorized to make additions or corrections to the database
 - Unauthenticated – Person allowed only to view the contents of the database
- Application Role – The role of the user. (ESP Staff, State Data Staff, State Content Area Staff, LEA Data Staff, LEA Content Area Staff, School Data Staff, School Content Area Staff, None)
- User ID – An ID assigned by the administrator, often first initial, last name.
- Organization – The organization with whom the user works.
- Phone number

Home ► System Administration ► User Management

Welcome Testuser Logout

Rows Per Page: 10 Set Export To: --Select-- Export

First Name	Last Name	E-Mail Address	Security Role	Application Role	User Id	Organization	Phone	Delete
Anne	Administrator	ann@uth.com	Administrator	None	annea	UTH		
Jane	Q	jane@uth.com	Administrator	None	janep	UTH		
John	Q	john@uth.com	Administrator	None	johnp	UTH		
Kyle	Ligon	kligon@espsg.com	ESP Administrator	ESP Staff	kligon	ESP		
Mathew	Simmons	mathews@uth.com	Administrator	None	mathews	UTH		
Sammy	Student	sammy@uth.com	Administrator	None	sammys	UTH		
Steve	King	sking@espsg.com	ESP Administrator	ESP Staff	Sking	ESP	(307) 778-2568	
Terry	Teacher	terry@uth.com	Administrator	None	terryt	UTH		

Add User Cancel

Figure 98 - User Management Screen

This information appears when you click on User Management. You can set the number of rows that will appear on a page in the upper left hand section. You can export the list of users by Selecting Excel as an Export choice. To add a new user, click on the Add User and you will see the following screen.

Home ► System Administration ► User Management

Welcome Testuser Logout

User Details - Create New User

Create New User

First Name *

Last Name *

User ID *

Password *

Confirm Password *

E-Mail Address *

Security Role * --Select--

Application Role * --Select--

Organization *

Phone

Save Cancel

Figure 99 - Create New User Screen

Required fields have a red asterisk. Save once you have completed an entry. For more information regarding Security Roles and Application Roles, please see page 4 of this User Guide.