Data Collector User Checklist

Version:	1.1
Last Updated Date:	December 14, 2009

Summary of Changes from Prior Versions

Changes from latest major version (1.0) are highlighted in this color if new and ~~strikethrough in this color if deleted~~. - NA

Changes from the prior minor version (1.0) are noted below

- Added – Reviewer role can monitor collection and submission progress
- Added other minor clarifications to various parts.

Data Collector Local Education Agency (LEA) Roles

Action	LEA Collector	LEA Submitter	LEA Reviewer
Starting a Data Collection (A)	X		
Monitor Collection Progress (B)	X	X	X
Prepare Report (C)	X		
Level 1 Validation Errors (D)	X	X	X
Preview/Review Report (E)	X	X	X
Certify and Submit Data (F)		X	
Monitor Submission Progress (G)	X	X	X
Level II Validation Correction and Resubmission (H)	X	X	X

Part A. Starting a Data Collection

See *SIFWorks® VRF™ Data collector – User's Guide* section entitled "Responding to a Collection Request (Report Manifest)" for more detailed information, as needed.

☐	1. Log into the Data Collector website as assigned by your ITC website address: ______________________________________
☐	2. Click on the *Collection Request* tab, if tab is not already open *Collection Request Summary* screen should be in view. One or more collection requests could be present under the Ohio Department of Education header, if a data collection is required Note: This screen also provides a Collection Request for diagnostic purposes only Make sure the box "Don't show built-in collections" , found on the right hand side of your screen, is checked if you do not want the diagnostic to appear on your screen.
☐	3. Determine Collection Request

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☐	4. Upload flat files to be used for identified Collection Request, if needed. If not, proceed to Step 6 ☐ a. Click the *Data Sources* tab - the *Data Sources* screen should be in view ☐ b. Click *Other Data Sources* link found under the header for this screen ☐ c. Find the appropriate data source in the first column and select *Manage* in the Actions Column **To upload a file** complete steps d - g ☐ d. Select *Upload File* found at the bottom of the list of files ☐ e. Select *Browse* and browse to the location of the file on your server/desktop and select the file to be uploaded ☐ f. Click *Open* ☐ g. Once the file name appears in the File to Upload box, click on *Upload* Note: If you have Google Gears you can upload multiple files at one time. **To Delete a file** complete steps h – j ☐ h. Click the box next to the file to be deleted ☐ i. Click *Delete Selected* found at the bottom of the list of files ☐ j. Click *OK* to *confirm*
☐	5. Click the *Collection Request* tab
☐	6. Select *Start Collection* in the *Actions* section – this will open the *Start Collection* screen Note: If you have not exported your Level 1 Validation Report from your most recent submission and you start another collection the report will be removed from view. The report will reappear only if you cancel the collection you have just started.
☐	7. Select the data sources (SIF and/or Flat File) to be used for this Collection Request Note: Zone Status must show “Connected” for a collection to actually occur. If it does not show “Connected”, contact your ITC.
☐	8. Click on *Start data collection for all items checked below* – Once the data has been collected, you will prepare the report See **Part C.** Note: To monitor the collection process, go to **Part B.**

Part B. Monitor Collection Progress

See *SIFWorks® VRF™ Data collector – User's Guide* section entitled "Monitoring Data Collection"

☐	1. Click the *Collection Status* tab
☐	2. Once on the Collection Status screen click the *Refresh* link to keep the latest results of the collection viewable Note: You can set the Automatic Refresh to the desired setting to alleviate the need to click on the *Refresh* link. If you feel the collection will take some time, you can log out of the console by selecting *Logout* in the upper right hand corner. You can return later to check on the latest status of the collection request.

Part C. Prepare Report

See *SIFWorks® VRF™ Data collector – User's Guide* section entitled "Preparing and Validating Requests" for more detailed information, as needed.

☐	1. Click the *Collection Request* tab, if tab is not already open - the *Collection Request Summary* screen should be in view
☐	2. Under the Collection Request being worked on, select *Prepare* link *under Actions* – this will open the *Preparation* screen
☐	3. Once the process is completed click *OK* or you can view the Level 1 Validation report.

Part D. Level I Validation Errors

See *SIFWorks® VRF™ Data collector – User's Guide* section entitled "Preparing and Validating Requests" for more detailed information, as needed.

☐	1. Click on the *Collection Request* tab, if tab is not already open. The *Collection Request Summary* screen should be in view
☐	2. If there are no Level I errors, go to **Part E**
☐	3. If there are Level I errors select the *Level 1 Validation* hyperlink found in the *Validation Status* section.
☐	4. Export the file by selecting the *"Export to File"* link
☐	5. Make the correction within the appropriate data source, and repeat **Parts A - E**. Continue this process until you are ready to submit your data

Part E . Preview/Review Reports

See *SIFWorks® VRF™ Data collector – User's Guide* section entitled "Preparing and Validating Reports" for more detailed information, as needed.

☐	1. Click the *Collection Request* tab, if tab is not already open – the *Collection Request Summary* screen should be in view
☐	2. Click *Preview/Review* from the *Actions* section Note: Preview is the action you will see after you Prepare your data. Review is the action you will see after you submit your data.
☐	3. Under *Preview/Review Options* select your preferred option from the *Views* drop down box
☐	4. Under *Preview/Review Options* check the box if you want to download a compressed zip file
☐	5. Under *Download Report,* select *the File Format*
☐	6. Click *Generate Preview*
☐	7. Click the appropriate report to view from the *Report Output* section
☐	8. Click *File* and *Print* to print the report

Part F. Certify and Submit Data

See *SIFWorks® VRF™ Data collector – User's Guide* section entitled "Certifying and Submitting" for more detailed information, as needed.

☐	1. Click the *Certify and Submit* hyperlink from the *Preview Report* screen -or - Click on the *Collection Request* tab, if tab is not already open. The *Collection Request Summary* screen should be in view and click on *Certify and Submit* from the *Actions* section
☐	2. Review the information found in the *Submission Details* section. This is the name of the report, the date and time it was collected, and shows how many times this data has been sent to the State
☐	3. Check the box next to *I certify this collection*
☐	4. Place any <u>personal</u> notes in the comments section Note: Information found in this box will not be seen by ODE as these are personal notes for your use only
☐	5. Click on *Certify & Submit,* which will then bring you to the *Submissions* tab

Part G. Monitor Submission Status

See *SIFWorks® VRF™ Data collector – User's Guide* section entitled "Certifying and Submitting" for more detailed information, as needed.

☐	1. Click the *Submissions* tab, if the tab is not already open
☐	2. Once on the Submissions screen click the Refresh link to keep the latest results of the submission viewable
☐	3. Once the information has been received by the Report Authority, you will see the updated time stamp and *Report Received* under the *Status* column

Part H. Level II Validation Errors

See *SIFWorks® VRF™ Data collector – User's Guide* section entitled "Receiving Responses from the RC Regarding Submission Status" for more detailed information, as needed.

☐	1. Wait for notification from the State for Level II validation errors - or - Periodically log in and review *Collection Request* tab for appearance of *Level II Validation* link (a link can also be found from the *Submissions* tab)
☐	2. Find the collection request on the *Collection Request* tab that corresponds to the information from the state and look for the *Level II Validations* link under the Validation Status section - or - Select the *View Submissions Results* in the *Actions* section on the *Collection Request* tab, which brings you to the Submission Results page, where you can click on the link under Attachments to view the Level II Validation Report
☐	3. If there are errors to correct, make the correction(s) within the appropriate data source, and repeat **Parts A - G**. Note: Updating the data source and repeating Parts A-G are dependent on your individual role assignments for the source application and the Data Collector