# **Data Collection Suite R1** WDE Data Collection Respondents The Data Collection Suite has been upgraded with enhanced security features and a contemporary look and feel. This manual is one resource to support respondents as they begin to use the new software and submit data to the WDE. Wyoming Department of Education 6/24/2013 Page i of 22

# Wyoming Department of Education

**Data Collection Suite R1 Respondent Manual** 

2013 © Wyoming Department of Education; all rights reserved.

Hathaway Building • Second Floor

2300 Capitol Avenue

Cheyenne, WY 82002

Phone 307.777.7675 • Fax 307.777.6234

<a href="http://edu.wyoming.gov">http://edu.wyoming.gov</a>

The Wyoming Department of Education does not discriminate on the basis of race, color, national origin, sex, age, or disability in admission or access to, or treatment of employment in its programs or activities. Inquiries concerning Title VI, Title IX, Section 504, and ADA may be referred to Wyoming Department of Education, Office for Civil Rights Coordinator, 2300 Capitol Ave., Cheyenne, WY, 82002-0050 or 307-777-7675, or the Office of Civil Rights, Region VIII, U. S. Department of Education, Federal Building, Suite 310, 1244 Speer Boulevard, Denver, CO 80204-3582, or 303-844-5695 or TDD 303-844-3417. This information will be provided in an alternative format upon request.

# **Table of Contents**

	Data Collection Suite R1 Respondent Manual	ii	
	Table of Contents	3	
	Purpose	4	
	Minimum System Requirements	4	
	Primary Navigation Pathway	4	
	Support	5	
	Roles and Accounts	6	
	Responding to a collection	7	
	Compile data	7	
	Log in	9	
	Upload a file	. 10	
	Confirmation	. 12	
	Certify	. 13	
	Confirmation	. 16	
	Decertify	. 16	
	Download	. 18	
	Respondent Selector	. 18	
	Tracking, Collections and Admin modules	. 20	
	Log out	. 20	
Α	Appendix A: Glossary		
Ir	dex	. 22	

# Welcome to the Data Collection Suite

The Data Collection Suite (DCS) Release 1 (R1) is a universal data collection and reporting tool developed by the Wyoming Department of Education to consolidate data collection into a central, streamlined interface. DCS will be released in phases. The initial phase will allow districts the ability to upload Excel forms to the WDE using Wyoming Education Fusion portal user accounts. Future releases will consolidate collections and allow for enhanced error checks.

#### **Purpose**

Schools are required to submit a variety of data collections each year. The data collected by the Wyoming Department of Education (WDE) is critical and essential to the continual growth of Wyoming's education system. The new Data Collection Suite R1 replaces the older WDE Data Collection Suite with improved security and account management. The user experience has been updated with a contemporary look and feel and easier site navigation. The purpose of this manual is to provide a reference for local education authorities to support their work with the DCS.

## **Minimum System Requirements**

The Data Collection Suite requires data to be submitted as Microsoft Excel spreadsheets. Excel 2007 or newer is required. The DCS is a web application and users must access the website using a W3C standard browser: Chrome, IE 9+ or Firefox.

# **Primary Navigation Pathway**

The URL to access DCS is:

https://portals.edu.wyoming.gov/DCS/support.aspx

The WDE takes data security very seriously. The DCS is a secured website. The user must enter the **https** to access the website.

The black DCS R1 header will remain the same on all pages. On the left is the Data Collection Suite R1 title. On the right at the top is the standard set of links for all Wyoming Government websites. The green "Citizen", "Business", "Government" and "Visitor" links will all take the user outside of the WDE websites to other state websites.



Figure 1 - DCS Header

Navigation for DCS will occur through the DCS Navigation Bar. The modules will remain the same on each page. If a user does not have rights to a module, the link will be visible and they will receive an access denied error if they try to access it. Respondents will not have access to the "tracking", "collections", or "admin" modules. A respondent who clicks one of these links will receive an access denied page.

#### Support

The support module (<a href="https://portals.edu.wyoming.gov/DCS/support.aspx">https://portals.edu.wyoming.gov/DCS/support.aspx</a>) is available to public users without signing in. This page contains a link to the DCS User Manual, Instructional Videos, Resources, and the Feedback Tool.



Figure 2 - DCS Support

The DCS User Manual is in pdf format and users will need Adobe Reader to be able to view the manual. Adobe reader can be downloaded here: http://get.adobe.com/reader/

The Instructional Videos are in mp4 format and can be viewed using one of the following:

- Windows Media Player (<a href="http://windows.microsoft.com/en-us/windows/download-windows-media-player">http://windows.microsoft.com/en-us/windows/download-windows-media-player</a>)
- QuickTime (http://www.apple.com/quicktime/download/)
- iTunes (<a href="http://www.apple.com/itunes/">http://www.apple.com/itunes/</a>)

The "Contact Us" link has phone numbers and email addresses for WDE staff who manage the DCS.

Perhaps the most exciting feature of the DCS Support page is the Feedback Tool. This is not a survey. The Feedback Tool is a web form that allows users to send constructive criticism and suggestions for improving the data collection experience. These comments are read and reviewed by WDE Data Stewards and staff who manage the DCS. There is a Captcha at the bottom of the form to prevent spam. Captcha is the distorted image of letters and numbers above the submit button. Humans can decipher the code, but automated spam bots cannot.

Send us Feed	<b>lback.</b> Your feedback is important to us.			
The Wyoming Department of Education (WDE) respects your opinion and would like to improve our programs, services and solutions. Your feedback is a critical component of improvement. Please send us a message about your observations, experience or recommendations. We appreciate you taking the time to provide your input. Here are a couple resources that might help if you arrived here inadvertently. The WDE Website is a good first start when looking for general information about the WDE. We also offer our Fusion website which is used for delivering solutions and navigating users to tools and sites for exchanging information.				
Your Name:				
Your Email Address:				
Subject:				
Feedback:				
KU E 7				
Type the code from	the image			

Figure 3 - Feedback Tool

#### **Roles and Accounts**

Each Local Education Authority (LEA) has control over their accounts. Accounts and Roles for DCS are managed through the Wyoming Education Fusion portal. The WDE Data Stewards are responsible for supporting the local administrator with account management. There are three roles for LEA users for each collection. Each of these roles is distinct and does not carry the abilities of the other roles. For example, a user will need WDE999 Edit and WDE999 Certify for a collection to be able to both edit data and certify their organization's WDE999 data.

#### Edit

The Edit role allows LEA users to upload, edit, and download excel spreadsheet files.

#### Certify

The certify and decertify functions are both contained in the Certify Role. This role allows a user to certify a submission that has already been uploaded and validated.

#### Read

The Read role only allows a user to view uploaded files.

To support LEA users with account management, the DCS Support module contains a link to view the profile of the currently logged in user. This is a quick troubleshooting method to

assist LEAs with role assignment. In the following example, this user has the roles to read, edit, and certify the WDE999 collection for Lincoln County School District #1.



Figure 4 - User Profile

## Responding to a collection

#### Compile data

Spreadsheet templates for each collection are available to download from the Data Collection Suite - Forms Inventory. Data must be gathered and entered into an excel spreadsheet prior to upload. The Data Collection Suite - Forms Inventory is available at <a href="http://edu.wyoming.gov/DataInformationAndReporting/DataCollectionSuite.aspx">http://edu.wyoming.gov/DataInformationAndReporting/DataCollectionSuite.aspx</a>. You can navigate there by beginning at the Wyoming Department of Education homepage (edu.wyoming.gov) and selecting the "Data, Information and Reports" icon, then selecting the "Data Collection Suite - Forms Inventory" icon on the left.



Figure 5 - Data Collection Suite - Forms Inventory

The carrot ">" will display details for each collection. Clicking on the carrot will open the following screen.

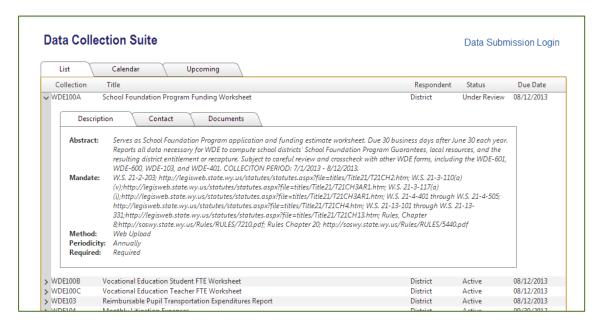


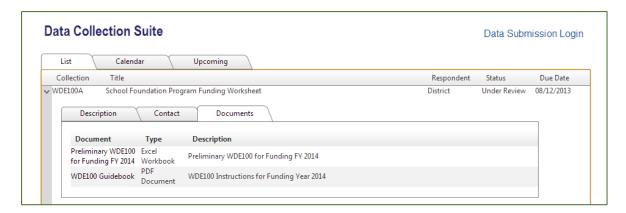
Figure 6 - Forms Inventory Collection Description

The Description tab contains a brief summary, the law or mandate which gives the WDE authority to collect the data, the method of upload, the periodicity and requirement for the collection.



Figure 7 - Forms Inventory Collection Contact

The Contact tab will list the WDE Division, staff member, and their direct contact details for the collection.



**Figure 8 - Forms Inventory Collection Documents** 

The Documents tab contains the excel template for the collection and any related documents such as FAQs or Guidebooks. Users must download the Excel Workbook to their computer and gather and compile the data prior to beginning the upload process.

#### Log in

To log in, the user will navigate to the DCS URL:

https://portals.edu.wyoming.gov/DCS/support.aspx

The Forms inventory also contains a link to the DCS above the list of collections. It is called "Data Submission Login".

The user will sign in using their Wyoming Education Fusion portal username and password.

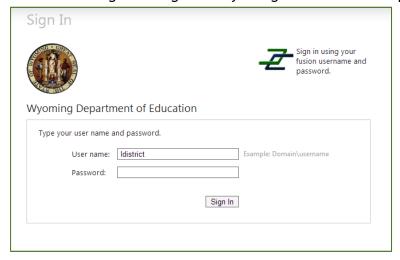


Figure 9 - Sign In

If a user does not remember their Fusion username and password, they may navigate to the Wyoming Education Fusion portal homepage at <a href="http://fusion.edu.wyoming.gov">http://fusion.edu.wyoming.gov</a>.

At the top right is a link called "password help". Clicking this link will allow a user to reset their Fusion password.



#### Upload a file

Once a user is logged in and the correct roles assigned, the next step is to upload a file. The user will click on the "upload" module in the navigation bar.



Then the user selects the desired collection. The user will only be able to see collections for which they have roles assigned. The right side of the screen displays the organization which the user is representing. This is important to note if a user represents more than one organization, for example both a school and a district. If a user only represents one organization, the system will default to that organization and no action is needed by the user.

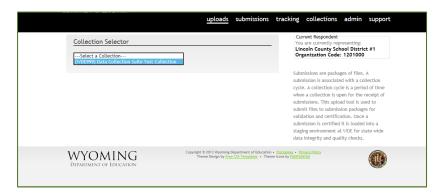


Figure 12 - Collection Selector

After a collection is selected, the upload screen will be visible.

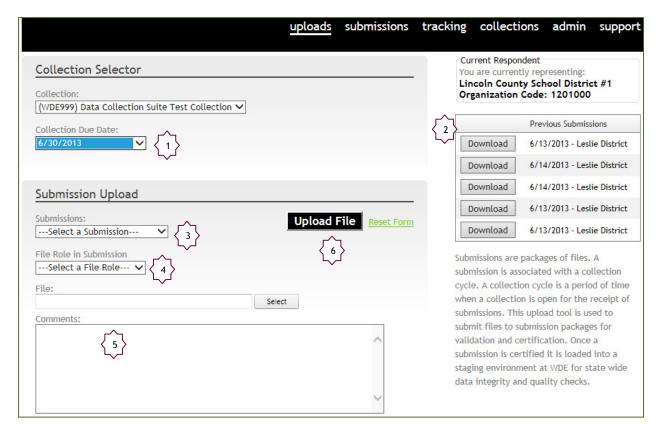


Figure 13 - Upload Screen

The user must select the due date for the collection if the collection has more than one submission per school year {1}. If there is only one cycle per year, the user will select that. The right side of the screen displays the organization the user is representing and any previous uploads performed by the user {2}. The main body of the page contains the upload functions. The user will need to indicate whether they wish to begin a new submission, or upload a new file to replace a previous upload {3}. The next selector {4} is for data collections with more than one required spreadsheet. The user will select the role for the spreadsheet they are uploading. Most collections only have one.

Next, the user will click the "select" button to navigate on their local computer to choose the prepared spreadsheet. The only files allowed are Microsoft Excel 2007 or newer. The file extension must be .xlsx. Renaming an older format Excel file with an .xls extension to .xlsx will not correctly prepare the file for upload and processing. Users must open the file in Microsoft Excel 2007 or newer and save the file as an .xlsx file.

There is a text box for LEA users to leave a comment {5} that goes along with the file. The comments are visible to WDE Data Stewards and all members of the uploading user's organization.

The final action is to click the Upload File icon {6}.

When the file has uploaded, a screen to continue appears.

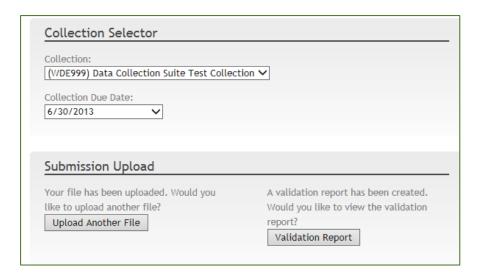


Figure 14 - Continue

At this point, a user can upload another file or exit the system. There is an icon for viewing validation reports. In the initial release of the Data Collection Suite, the system only validates that a file was uploaded and that the file met the file format requirements. In future releases, this is where business rules and other data checks will be displayed.

#### **Confirmation**

The DCS sends an email confirming the success of a file upload. A sample is included below.

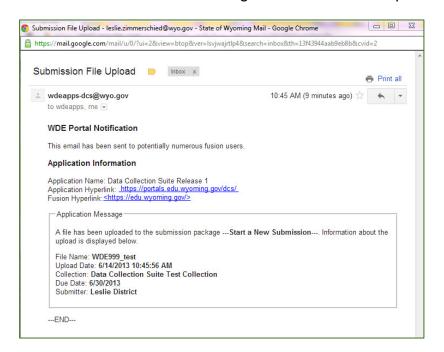


Figure 15 - Email Confirmation

The sending address is <a href="wdeapps-dcs@wyo.gov">wdeapps-dcs@wyo.gov</a> and users may want to add this to their contact list to prevent the messages from going to a spam folder. The email is sent to numerous Fusion users. The confirmation is emailed to the WDE Data Steward for the collection, the

user who uploaded the file, and all other users in that organization with rights to the same collection. The email will contain the name of the file uploaded, the date and time it was uploaded, the full name of the data collection, the due date of the collection, and the full name of the person who uploaded the file. This is the LEA's confirmation the file was placed in the system. It is not the confirmation that the file was certified. The upload and certify functions are separate in the new DCS. Steps to certify an uploaded file are below.

#### Certify

To certify a collection, the user must select the submissions module from the main navigation bar.



A file may be certified by a user who did not upload the file, as long as they are in the same organization as the uploader and have the certify role for the collection. This is to allow organizations flexibility in their work processes.

Select the collection name from the collection selector.

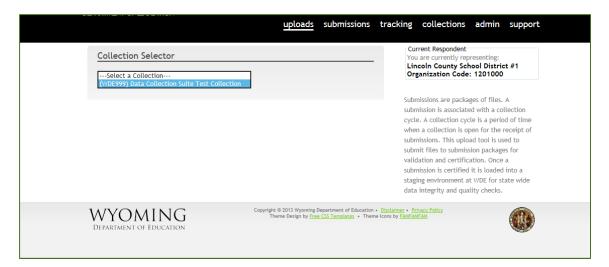


Figure 17 - Collection Selector

Then the user selects the desired collection. The user will only be able to see collections for which they have roles assigned.

The Submission Administration page will appear.

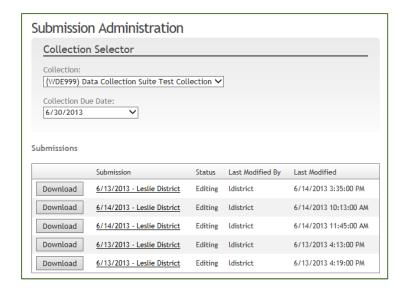


Figure 18 - Submission Administration

The user must select the due date for the collection if the collection has more than one submission per school year. If there is only one cycle per year, the user will select it. The main body of the page displays all the file uploads for the collection for the current cycle and due date for the organization. There is an icon on the left to download and save a copy of the data collection to a local computer. The system will display the current status of the files, the last person to edit each documents, and the time it was edited. The date and name of the user in the "submission" column is a link to in-depth information about the file.

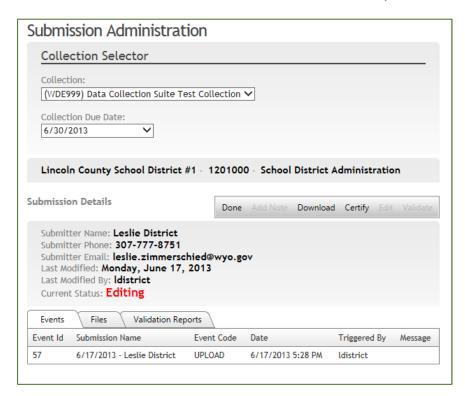


Figure 19 - Details Page

The details page will show the name of the user who uploaded the file, their phone number, their email address, the data and time of upload, and the comments from the file upload. The current status is in red in the center. The "Done" link in the secondary navigation bar will return the user to the prior screen without performing any action. The entire submission can be downloaded by using the "Download" link in the navigation bar. In the lower part of the screen, there are three tabs. The first is the event log. The second is the event log for each file in the submission. The last tab is for validation reports. In the initial release of the Data Collection Suite, the system only validates that a file was uploaded and that the file met the file format requirements. In future releases, this is where business rules and other data checks will be displayed.

In the navigation bar is a link to certify the collection. This will only be available to users who have the certify role and on files that are in the correct format (MS Excel 2007 or later). In future releases of the DCS, all the business rules must be met before a file can be certified.

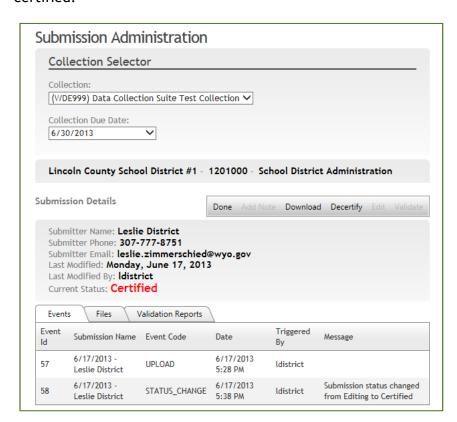


Figure 20 - Certified Collection

Clicking the certify link changes the Current Status to "Certified". The event log then shows a Status Change from Editing to Certified. The link in the navigation bar changes to display Decertify as an option. Only one submission may be certified at a time. Submissions can never be deleted from the system, only decertified. If a user desires to make a change to their certified data, they must decertify, make the change and then certify again.

#### Confirmation

The DCS sends an email confirming the success of certification. A sample is included below.

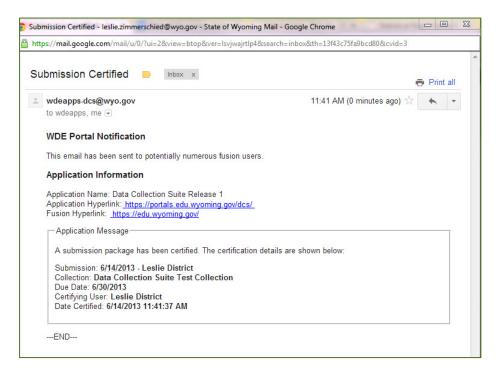


Figure 21 - Email Confirmation

The sending address is <a href="wdeapps-dcs@wyo.gov">wdeapps-dcs@wyo.gov</a> and users may want to add this to their contact list to prevent the messages from going to a spam folder. The email is sent to numerous Fusion users. The confirmation is emailed to the WDE Data Steward for the collection, the user who uploaded the file, and all other users in that organization with certify rights to the same collection. The email will contain the name of the file certified, the date and time it was certified, the full name of the data collection, the due date of the collection, and the full name of the person who certified the file. This is the LEA's official confirmation the file was certified to the WDE.

## **Decertify**

To withdraw your certification of a submission, the Submissions Module is used. Only a user with the Certify role for a collection may perform decertification functions.



From the Submission Administration page, the user will select the data collection. The user will only be able to see collections for which they have roles assigned. Clicking the name of

the submission will show the details. In the example in Figure 23, the last submission on the list is certified.

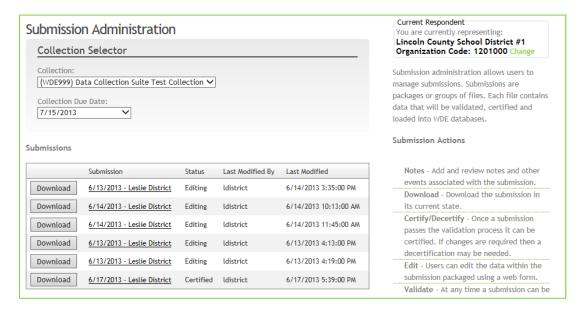


Figure 23 - Submission Administration page



Figure 24 - Submission Details page

On the Submission Details page the current status of the submission is in red in the center. The event log for the submission shows the name of the user who certified and the time it was certified. Clicking the "Decertify" link in the navigation bar will withdraw the certification of the submission. Only one submission may be certified at a time. If a user wants to make changes to a certified collection, it must be decertified and reuploaded.

#### **Download**

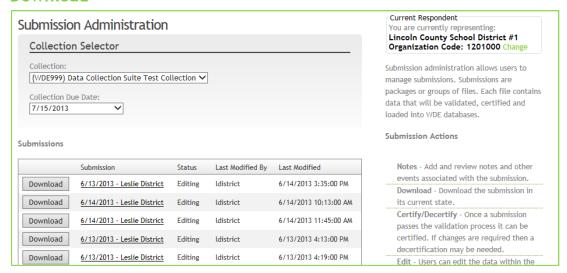


Figure 25 - Submission Administration

From the Submission Administration page, click the "Download" icon to the left of the submission. This will allow a user to save a copy of the submission for their records. The submissions will not be available to download from the DCS after the clean up window, so it is recommended that users save their certified submissions as soon as possible.

If a submission was decertified and downloaded to make corrections, the respondent will need to return to the Upload screen to reupload the submission, then the submissions screen to recertify.

## **Respondent Selector**

The Data Collection Suite allows a user to be associated with more than one organization and respond to data collections from different organizations without logging out and using a different username and password. For example if a user is associated with more than one school, or a school and a district office.

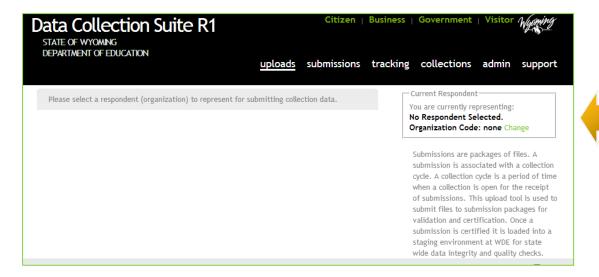


Figure 26 - Respondent Selector

The Respondent Selector is located on the right side of the page, under the primary navigation bar. If a user is only associated with one organization, the Respondent Selector will default to that organization and no action is required by the user. If a user is associated with multiple organizations, they must make a selection before uploading.

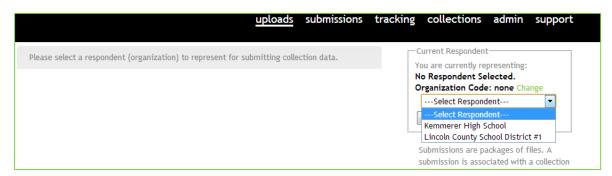


Figure 27 - Respondent Selector Drop Down

A drop down menu will display all the organizations with which the user is associated.

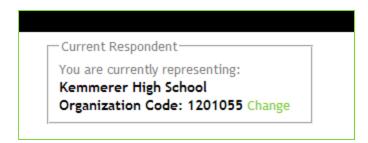


Figure 28 - Respondent Selected

After an organization is selected, the Respondent Selector will be displayed on all pages in DCS. If a user needs to change organizations, click the "Change" link and the drop down will appear again.

# Tracking, Collections and Admin modules



Figure 29 - DCS Header

The DCS header contains links to three modules not currently available to LEA users. The Tracking, Collections and Admin modules are used by the WDE staff to manage the system. Local users will receive an Access Denied page when clicking on these links.

### Log out

There is no "log out" function. If using a shared computer, the user should close all browser windows, not just the tab they are using.

# Appendix A: Glossary

Notes - User added notes and other comments associated with the submission.

**Download** - Download the submission in its current state to a local computer.

**Certify/Decertify** - Once a submission passes the validation process it can be certified. This is the official delivery of the submission to the WDE. If changes are required then a decertification may be needed. Not all collections may be decertified.

Edit - Users can edit the data within the submission package using a web form.

**Validate** - At any time a submission can be validated. This is the process of reading and validating the data packaged within the submission.

**Submissions** - A collection cycle is a period of time when a data collection is open for the receipt of submissions. Each collection has its own cycle(s). A data cycle contains only one submission. Submissions are packages which contain one or many files. The DCS upload tool is used to submit files to submission packages for validation and certification. Each file contains data that will be validated, certified and delivered to the WDE.

**Upload** - To place a file from a local computer into the Data Collection Suite System.

**Fusion** - The Wyoming Education Fusion portal. A secure website for many of the WDE's communications and activities. URL: https://fusion.edu.wyoming.gov

**WDE** - Wyoming Department of Education

**LEA** - Local Education Authority. In Wyoming this could be a school district, accredited institution, private school, etc.

**SEA** - State Education Authority. In Wyoming, this is the Wyoming Department of Education (WDE).

# Index

accounts, 6	Log in, 9
authority, 8	log out, 21
Captcha, 5	Microsoft Excel, 4
certify, 16	Minimum System Requirements, 4
Certify, 13, 22	Notes, 22
Certify Role, 6	password help, 9
collection cycle, 22	Purpose, 4
Compile data, 7	Read role, 6
confirmation, 17	Respondent Selector, 19
Confirmation, 12, 16	Responding to a collection, 7
Contact Us, 5	Roles, 6
Decertify, 17, 18, 22	SEA, 22
Download, 15, 19, 22	Submission Administration, 13
due date, 11, 14	Submissions, 22
Edit, 22	Support, 5
Edit role, 6	templates, 7
Excel, 11	Upload, 22
Feedback Tool, 5	Upload a file, 10
Forms Inventory	Upload Screen, 11
Data Collection Suite - Forms Inventory,	username, 9
7	Validate, 22
Glossary, 22	WDE, 22
Instructional Videos, 5	Wyoming Education Fusion portal, 6
LEA, 22	Fusion, 22