Managing Collections from the Progress Tab

Overview

Starting with the 2.1 release of the Data Collector users will be able to manage the progress of collections from the Progress tab (rather than only view their progress):

In addition to checking the status of collections, users can collect, prepare and preview from the new Progress tab. One can also view the Level 1 and Level 2 reports. The intent is to simplify the process of managing and reviewing collections for multiple Collection Requests. This feature will be especially helpful to users with access to more than one LEA.

Changes in the Progress page query results table

Action column

The action column allows users to start a collection (Collect), start a prepare (Prepare) or Preview the results of a prepare:

The actions available in the Action column are the same as the actions available from the Collection Request tab, except that only one action per collection is available on the Progress page at a time. The one available is the next most logical step in the processing. When starting a collection from the Collection Request tab the Data Collector redirects to the Start Collection page. From the Progress tab the Collect link starts the collection without redirecting to another page. This is possible because Default Collection Settings have been introduced in this version – when starting a collection from the Progress tab the Data Collector uses these default collection settings to determine from which data source(s) to collect the data.

Users can configure the default collection settings for each Collection Request and LEA, from either the Progress tab or the Collection Request tab. When the Default Collection Settings have not been configured, and the LEA is ready for starting a collection, the Action column shows the Set Clct Dflt link (abbreviation for Set Collection Defaults), rather than a Collect link. Users cannot collect data from the Progress tab without having set the default data source.

A link to the Level 1 reports page

The prior version of the Progress page showed the number of Level 1 fatals. The new version has a link to the Level 1 validation reports page, with the number of fatals in parenthesis:

Old   New

Level 1 Fatals   **L1**

90   L1(90 ftl)

Level 1, Level 2 and Err,Warn columns combined into one column

There is now a single column which shows whether there are any Level 1 or Level 2 reports, or any Errors or Warnings, for the collection (previously each of these had its own column):

L1 / L2 / Err,Warn
(Count: 1)
L1(90 ftl) / L2(None) / Err: 6
(Count: 1)
L1(None) / L2(None) / None
(Count: 1)
L1(None) / L2(None) / None
(Count: 1)
L1(None) / L2(1 Rpt) / None
(Count: 1)
L1(None) / L2(1 Rpt) / Err: 6

The Progress page uses "None" to indicate that there are no such reports. When the report(s) are present, the page offers a link – L1 for Level 1 reports, L2 for Level 2 reports, and Err (or Warn) for Errors or Warnings.

Show Never Submitted link

In addition to the Run Query link there is now the Show Never Submitted link:

Run Query | Show Never Submitted

When users click the Show Never Submitted link they will see the list of Collection Requests, for the LEAs which have never started a collection for these Collection Requests or started a collection but never not certified and submitted.

The Show Never Submitted link only observes the LEA and Collection Request filter options. All other filter options are ignored.

Changes to the Filter Options

Users can now select Collection Requests by Data Set and/or by Year. Previously users could only select a single collection request or all of them.

If selecting a single Collection Request from the drop down, any Data Set and Year selections entered are ignored.

Display Options

Users can now group by LEA, processing stage, or no grouping at all, in addition to the prior ability to group by Collection Request:

Grouping by LEA can be useful when wanting to work with a single LEA

Submitter / Collection Request	Code	Subm	Ver	Timestamp	Stage or Result	Action	L1 / L2 / Err,Warn
▼ Arapo (047676)							(Count: 5)
❌ FY15-Z-Next Gen Appeal	2015ZGNSP	1	3	02/15/2016 03:23:57 PM	Collection Previewed	Preview	L1(90 ftl) / L2(None) / Err: 6
✅ FY16-S-TRAD Final	2016S3TRD	1	1	06/09/2016 11:17:15 PM	Collection Completed	Set Clct Dflt	L1(None) / L2(None) / None
✅ FY16-S-TRAD Mid	2016S2TRD	1	3	03/10/2016 02:18:13 PM	Collection Completed	Collect	L1(None) / L2(None) / None
❌ October Collection	2011KNEL2	7	3	06/08/2016 12:45:37 PM	Collection Previewed	Preview	L1(None) / L2(1 Rpt) / Err: 6
✅ October Collection L2	2011K00L2	43	3	06/09/2016 07:39:33 PM	Collection Completed	Prepare	L1(None) / L2(1 Rpt) / None

Export to a file

When authorized for multiple LEAs, each LEA has its own section, which can expand and collapse using the expand/collapse arrows: ▼ and ▶

Submitter / Collection Request	Code	Subm	Ver	Timestamp	Stage or Result	Action	L1 / L2 / Err,Warn
▼ Arapo (047676)							(Count: 5)
❌ FY15-Z-Next Gen Appeal	2015ZGNSP	1	3	02/15/2016 03:23:57 PM	Collection Previewed	Preview	L1(90 ftl) / L2(None) / Err: 6
✅ FY16-S-TRAD Final	2016S3TRD	1	1	06/09/2016 11:17:15 PM	Collection Completed	Set Clct Dflt	L1(None) / L2(None) / None
✅ FY16-S-TRAD Mid	2016S2TRD	1	3	03/10/2016 02:18:13 PM	Collection Completed	Collect	L1(None) / L2(None) / None
❌ October Collection	2011KNEL2	7	3	06/08/2016 12:45:37 PM	Collection Previewed	Preview	L1(None) / L2(1 Rpt) / Err: 6
✅ October Collection L2	2011K00L2	43	3	06/09/2016 07:39:33 PM	Collection Completed	Prepare	L1(None) / L2(1 Rpt) / None
▼ Marion District (048553)							(Count: 4)
❌ FY15-Z-Earl Test	2015ZEARL	1	2	02/13/2016 06:17:32 PM	Prepare Completed	Preview	L1(207 ftl) / L2(None) / Err: 6
❌ FY15-Z-Next Gen Appeal	2015ZGNSP	1	3	06/09/2016 02:39:34 PM	Collection Previewed	Preview	L1(196 ftl) / L2(None) / Err: 6
❌ October Collection	2011KNEL2	1	3	02/28/2016 04:16:22 PM	RC: Pending Processing	Set Clct Dflt	L1(None) / L2(3 Rpts) / Err: 4
✅ October Collection L2	2011K00L2	10	3	06/09/2016 02:25:08 PM	Prepare Completed	Preview	L1(None) / L2(5 Rpts) / None

Export to a file

Caching for improved interactivity

Most of the links on the Progress page redirect to another page: to view Level 1 or Level 2 reports, Preview the results of the prepare, or set the Collection Defaults. However, the Collect and Prepare links start the process of collecting or preparing, and return (almost immediately) to the Progress page.

When the Data Collector returns to the Progress page it does not rerun the Progress Query to re-generate the Query results. Instead it re-displays the query results it has cached, updating only the Collect or Prepare action, which was just selected , with a "Collecting …" or "Preparing …" in the Action column:

Submitter / Collection Request	Code	Subm	Ver	Timestamp	Stage or Result	Action	L1 / L2 / Err,Warn
▼ Arapo (047676)							(Count: 5)
❌ FY15-Z-Next Gen Appeal	2015ZGNSP	1	3	02/15/2016 03:23:57 PM	Collection Previewed	Preview	L1(90 ftl) / L2(None) / Err: 6
✅ FY16-S-TRAD Final	2016S3TRD	1	1	06/09/2016 11:17:15 PM	Collection Completed	Set Clct Dflt	L1(None) / L2(None) / None
✅ FY16-S-TRAD Mid	2016S2TRD	1	3		Collecting	Collecting …	L1(None) / L2(None) / None
❌ October Collection	2011KNEL2	7	3	06/08/2016 12:45:37 PM	Collection Previewed	Preview	L1(None) / L2(1 Rpt) / Err: 6
✅ October Collection L2 …	2011K00L2	43	3		Preparing	Preparing …	L1(None) / L2(1 Rpt) / None

The down side of the improved interactivity, by caching the results of the Progress Query, is that the displayed results can become stale – the actual Stage may differ from the one displayed on the page. Therefore, the caching expires after a few minutes. Once the caching expired the Query results are not shown when the page refreshes. Of course the option of clicking the Run Query link to get the latest stage for each collection, at any time. The cache of the Query results is also invalidated if changing any of the filter criteria – otherwise the results displayed would not match the selected filter options.

Configuring the Default Collection Settings

In addition to the Set Clct Dflt link in the Action column, when these settings have not been configured, there is the Set Default Collection properties link on the Collection Request tab:

> **Status:** This collection has never been submitted.
> **Submission Number:** 1 (attempt 0)
> **Actions:** Start Collection
> Add New Scheduled Collection
> Set Default Collection properties

When the default collection settings have been configured, the link on the Collection Request tab changes to Edit Default Collection properties:

Status: This collection has never been submitted.
Submission Number: 1 (attempt 0)
Actions: Start Collection
Add New Scheduled Collection
Edit Default Collection properties

When editing the Default Collection properties one will see who configured these properties. One can also specify to automatically start the Prepare as soon as the data collection completes by selecting the 'Collect and Prepare' option.

Edit Default Data Source(s) for Collection
Career Tech Assessment Collection FY16 for Arapo (047676)

To update the default collection data sources, modify the options below, and click Update Default Collection.

Collection Request / Submitter

Collection Request: Career Tech Assessment Collection FY16
Submitter: Arapo (047676)

Last Updated By / On

User id: sifworks
Name: VRF Administrator
email id: sifworks@administrator.com
Updated at: 06/10/2016 03:03:59 PM

Data Sources	Availability
☐ october	✓ Ready
☐ test	✓ Ready
☑ FA	✓ Ready

Scope of execution

Perform: ⦿ Collect Only   ◯ Collect and Prepare

Update Default Collection | Cancel

The options selected in the Set Default also apply to collections started from the Collections Request tab. The defaults can be over written from the Collection Request tab if desired.

. **Frequently Asked Questions**

Q: Why are the Collect and Prepare links, in the Action column red, while the Preview and Set Clct Dflt links are blue?
A: This is in keeping with the pattern used by the Progress page: blue links redirect to another page, while red links start an action and refresh the Progress page.

Q: What happens when I am not authorized to start a collection?
A: You will see Collect and Prepare as labels, rather than links. You will be able to Preview, or view the Level 1 and Level 2 reports, but you will not be able to Collect or Prepare.

Q: Can I see LEAs, using the Progress page, for which I am not authorized?
A: No.

Q: What happens if I start a Collect or Prepare from the Progress page, while someone else on the EMIS staff starts the same action from the first tab?

A: This is analogous to two users performing the same action from two different browsers/computers from the same tab. The Data Collector has the logic to reconcile such simultaneous (or almost simultaneous) actions.

Q: Can I Certify & Submit from the Progress page?

A: No. You need to use the Preview link – from the Preview page you can Certify & Submit if the collection is at the stage at which it can be certified. Or you can Certify & Submit from the collection request tab.

Q: Can I cancel a collection from the Progress page?

A: No. You need to use the Collection request tab to cancel a collection.

Q: What about Collection Restart. Can I restart a collection from the Progress page?

A: Also no. You need to use the collection request tab to restart a collection.

Q: After clicking on an Action link the Progress Query results do not show.

A: This means the timeout on the cached query results expired. Click the Run Query link to see the query results.

Q: Can I still Export the query results to a file, the way I used to be able to, from the Progress page?

A: Yes.

Q: What does group by "Stage" mean?

A: The "Stage" refers to the Processing Stage checkboxes. These stages are listed in the same order as the checkboxes: Collecting, Collection Completed, Preparing, etc.

Q: When initiated from the Progress tab, what happens when a Collect or Prepare action, runs into a problem? Will I get any indication of this?

A: You will get an error message, in the error text area next to the links, with a suggestion that you re-run the Query:

The Stage and Action will show that the current status of this collection is Unknown. Click the Run Query link to get the actual Stage for this collection.

Q: When I select the Progress tab, I have a single submitter selected:

 but can see, if I have access to more than one

submitter, more than one submitter in the query results. How do the submitted selection and the query results work together?

A: The Progress page observes the LEA selections in the filter options, ignoring the "currently active LEA" in the submitter drop-down. When redirecting from the Progress page – e.g. by clicking on a Preview link – the Progress page automatically changes the currently selected submitter to the one which owns the collection. This ensures "submitter continuity" when choosing another tab, e.g. Submissions or Archives, after a Preview initiated from the Progress page.

Q: Why does the name of the Collection Request display differently when I group by Collection Request, then when I group by anything else?

A: This is because of space considerations. When you group by Collection Request the Data Collector has the whole line on which to display the Collection Request name, and its Code, in parenthesis. When you group by anything else the Data Collector uses the short name of the collection request, and shows its code in the next column.

Q: After I start a collection from the Progress Query results Collect link, the LEA and collection request (for which I just started the collection) disappears from the display. Why is this?

A: This is because you have the Collecting processing stage unselected. When you started the collection for the LEA, its stage moved to Collecting and is no longer in the set of Processing stages you selected.

Q: Does the same apply to clicking the Prepare link and the Preparing processing stage?

A: Yes. When the Preparing processing stage is unselected, and you click the Prepare link, the collection disappears from the display when the page refreshes.

Q: It seems that I cannot start a collection as soon as I Certify & Submit, the way I used to be able to. Is this true, and if so, why is this?

A: Yes, this is so. The Data Collector used to allow the start of a collection as soon as you Certified the prior one. Now the Data Collector delays to make sure that the certified collections data has progressed far enough to reach ODE. Without this delay, the Prepare action of the next collection could wipe out the data of the attempted submission.