Pennsylvania
Department of Education

# Pennsylvania Information Management System

# PATI Survey Data Entry Tool User Manual

# LEA Survey

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V3.0

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## Introduction

Every year the Pennsylvania Department of Education (PDE) gathers technology-related data through a variety of surveys that comprise the Pennsylvania Technology Inventory (PATI). PATI is used for required federal and state technology reporting, as well as providing data for LEAs as they plan for the strategic use of local technology resources.

The PATI Survey response data is collected in the Pennsylvania Information Management System (PIMS). PDE realizes that unlike most data submitted to PIMS, responses to the PATI Survey are most likely not stored in an LEA's student information system, and in fact may not be stored in a database at all. For this reason PDE provides the PATI Survey Data Entry Tool to provide an easy-to-use tool to complete the survey and save the data in PIMS format.

## PATI Survey Data Entry Important Notes

Important notes about using the PATI Survey Data Entry Tool:

- The PATI Survey Data Entry Tool is comprised of multiple sheets or tabs within a single Microsoft Excel workbook. The workbook is provided in .XLS (Excel 97-2003) format and is compatible with all recent versions of Excel for both Mac and Windows.
- The first sheet in the workbook (*Terms and Definitions*) is a list of definitions for terms used in the survey such as ISP, WAN and several others. The second sheet (*LEA Survey*) is where a user will enter the appropriate answers to the questions that are relevant to LEAs (School Districts, Charter Schools and Career Technical Centers). The last sheet (*SURVEY_PARTCPNT_RESPONSE*) is created by the tool based on the answers entered in the *LEA Survey* sheet. This last sheet formats the responses into the format required for the PIMS Survey Participant Response Template.
- Each of the Excel sheets are "locked" to preserve the formatting. The only editable cells in the worksheets are the response entry boxes in the *LEA Survey* sheet. This guards against the inadvertent deletion or addition of questions, columns or other formatting changes that would make the format inconsistent with PIMS.
- To submit a completed survey file to PIMS, the user will save the template formatted sheet (*SURVEY_PARTCPNT_RESPONSE*) in comma separated value format (CSV). **If changes/corrections are required after saving as CSV it is imperative that these corrections are made within the *LEA Survey* sheet in the Excel version of the file, not the CSV version.** After the corrections are completed, the Excel file will then need to be saved as CSV again for re-submission to PIMS. If corrections are made to the CSV all formatting and validations applied to the sample files will be lost.

# Instructions

The PATI Survey Data Entry Tool is comprised of multiple sheets or tabs within a single Microsoft Excel workbook. Open the Excel file and select the *LEA Survey* sheet by clicking on the second sheet at the bottom of the screen. To begin the survey, select your LEA from the drop-down list. The Administrative Unit Number (AUN) for your LEA will be prepopulated based upon your selection.

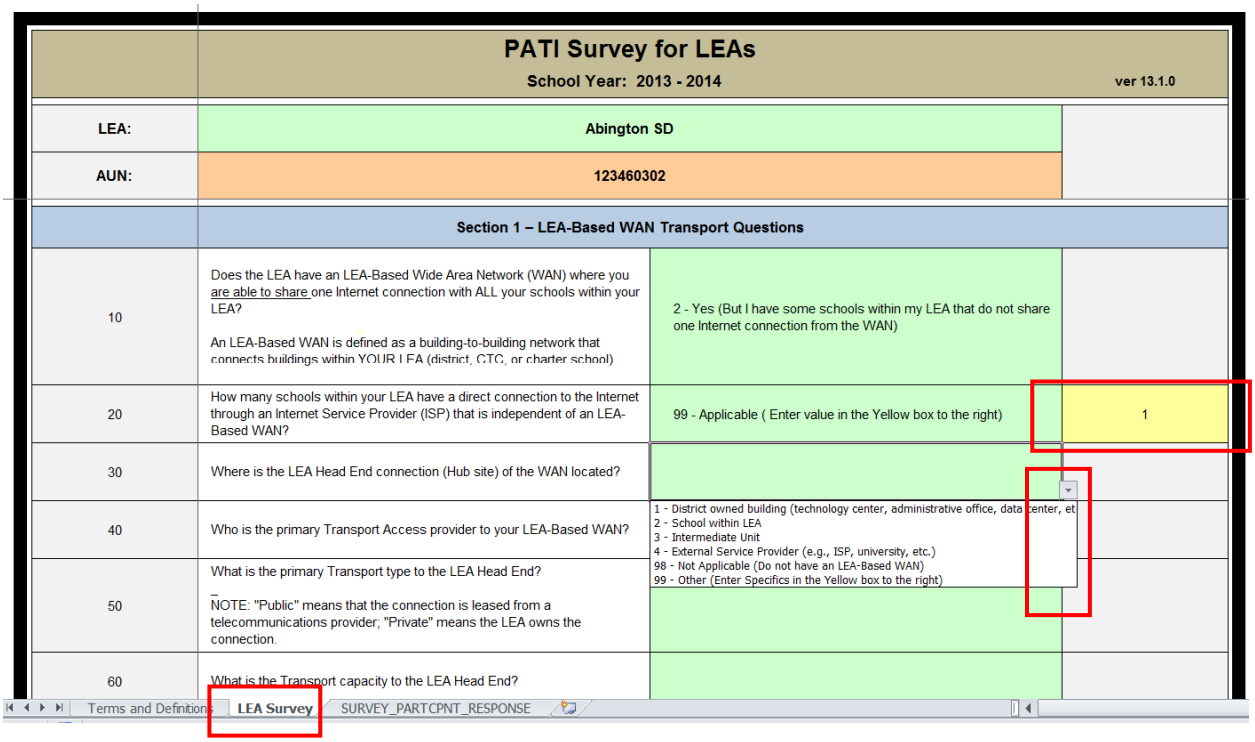


Figure 1: LEA Survey Sheet

The relevant survey questions for LEAs are pre-populated with drop-down boxes to select a response from the list of valid selections specified in the PIMS User Manual. Please note the drop-down boxes are scrollable. If you do not see the appropriate answer, be sure to scroll all the way to the bottom of the list to view all of the potential answers.

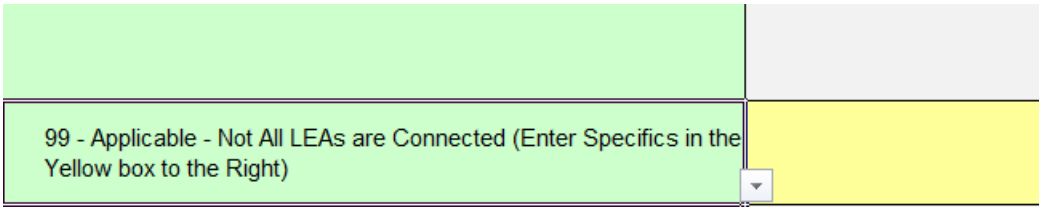


Figure 2: Conditional Formatting Example

The *LEA Survey* sheet includes formatting to indicate where responses are required; any cell shaded green requires a response. All of the questions require a response. Free form responses should only be entered when the drop down response selected is 99. When 99 is selected the corresponding cell in the Free Form Response column will turn yellow, otherwise it will remain gray.. When entering a free form response, please do not insert commas into your free form response answers. Commas will result in errors when the final file is uploaded to PIMS.

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After entering the answers to the survey within the *LEA Survey* sheet, the relevant data is populated on the third sheet (*SURVEY_PARTCPNT_RESPONSE*) and formatted in PIMS Survey Participant Response Template format.

| | A | B | C | D | E | F | H |
|---|---|---|---|---|---|---|---|
| 1 | DISTRICT CODE | SURVEY_NAME | SURVEY ADMINISTRATION | PARTICIPANT ID | SURVEY QUESTION ID | SURVEY CHOICE VALUE | FREE FORM RESPONSE TEXT |
| 2 | 123456789 | PATI_LEA | 2013-06-30 | 123456789 | 10 | 3 | |
| 3 | 123456789 | PATI_LEA | 2013-06-30 | 123456789 | 20 | 98 | |
| 4 | 123456789 | PATI_LEA | 2013-06-30 | 123456789 | 30 | 99 | asdf |
| 5 | 123456789 | PATI_LEA | 2013-06-30 | 123456789 | 40 | | |
| 6 | 123456789 | PATI_LEA | 2013-06-30 | 123456789 | 50 | | |
| 7 | 123456789 | PATI_LEA | 2013-06-30 | 123456789 | 60 | | |
| 8 | 123456789 | PATI_LEA | 2013-06-30 | 123456789 | 70 | | |
| 9 | 123456789 | PATI_LEA | 2013-06-30 | 123456789 | 80 | | |
| 10 | 123456789 | PATI_LEA | 2013-06-30 | 123456789 | 90 | | |
| 11 | 123456789 | PATI_LEA | 2013-06-30 | 123456789 | 100 | | |
| 12 | 123456789 | PATI_LEA | 2013-06-30 | 123456789 | 110 | | |
| 13 | 123456789 | PATI_LEA | 2013-06-30 | 123456789 | 120 | | |
| 14 | 123456789 | PATI_LEA | 2013-06-30 | 123456789 | 130 | | |
| 15 | 123456789 | PATI_LEA | 2013-06-30 | 123456789 | 140 | | |

Terms and Definitions | LEA Answer Form | SURVEY_PARTCPNT_RESPONSE

Figure 3: SURVEY_PARTCPNT_RESPONSE Sheet

<u>To create a file that can be submitted to PIMS, select the SURVEY_PARTCPNT_RESPONSE sheet by clicking the tab at the bottom of the screen. This is required in order for Excel to save data from the appropriate sheet.</u>

Follow the instructions below. Note that depending on the version of Excel you are using your screen may appear different than the screenshots below, but the labels and commands (File, Save As…) will be the same.

1. Click FILE
2. SAVE AS

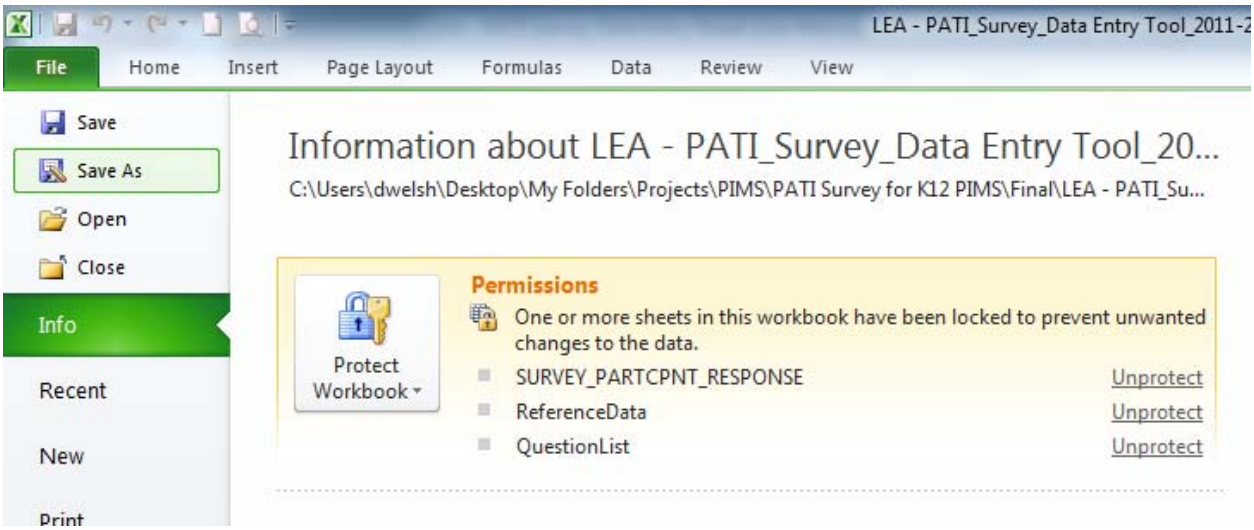


**Figure 4: Saving the Survey Results as a CSV – part 1**

The file naming convention is specified in the user manual. It includes:

- District Code = 9-digit Administrative Unit Number
- Target Table (located on template)
  - Example: "SURVEY_PARTCPNT_RESPONSE"
- Date/Time Stamp (YYYYMMDDhhmm)
  - Example: "201408251025"
- File Type
  - As shown in Figure 4 - Select "CSV (Comma delimited) (*.csv)

Please note that both the LEA and the School Surveys are submitted within the same template in PIMS. When saving these files LEAs will need to give these files different names by varying the date and/or time in the file name.

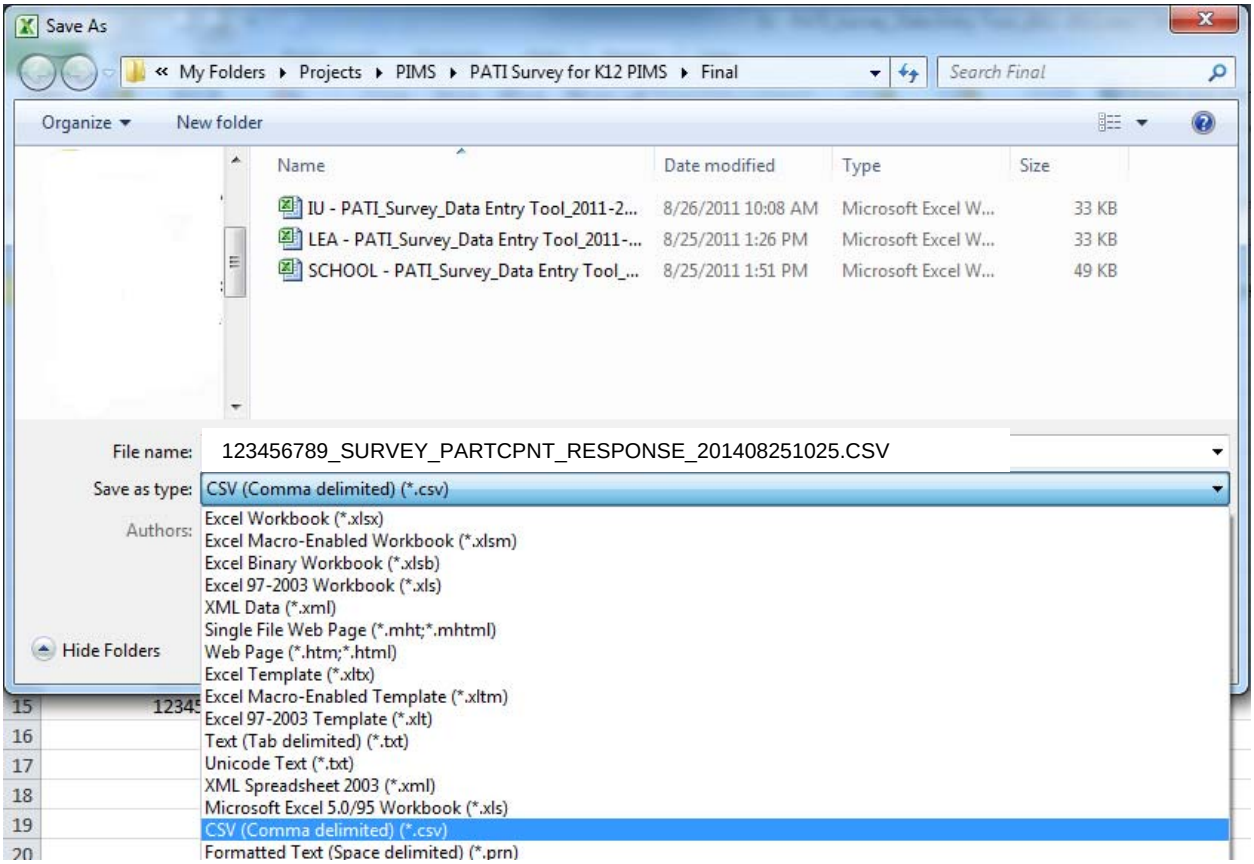


**Figure 5: Saving the Survey Results as a CSV – part 2**

IMPORTANT: If you open the CSV file after saving it, Excel will automatically reformat the plain-text data for fields that contain dates and codes that contain leading zeros to Excel's default formats that PIMS will not accept. As described earlier, any changes to the data should be made in the Excel version of the file and then the *SURVEY_PARTCPNT_RESPONSE* sheet should be re-saved as a CSV.

**Please note that the CSV file will include a header row. When the PIMS Administrator uploads this file to PIMS he or she will need to check the checkbox next to "File/All files within Zip file contain headers".**