Pennsylvania
Department of Education

Pennsylvania Information Management System

PATI Survey Data Entry Tool User Manual

School 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 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 common IT equipment, such as high, low and mid-capacity computers, handheld devices, etc. The second sheet (*School Survey*) is where a user will enter the appropriate answers to the questions that are relevant to schools. The last sheet (*SURVEY_PARTCPNT_RESPONSE*) is created by the tool based on the answers entered in the *School Survey* sheet. This last sheet translates the responses into the format required for the PIMS Survey Participant Response Template..
- The PATI Survey Data Entry Tool for schools can only be used for one school at a time. If users are responding to the survey on behalf of multiple schools they will need to save separate copies of the file, one for each school.
- 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 *School 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 *School 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 *School Survey* sheet by clicking on the second sheet at the bottom of the screen. To begin the survey, select your LEA and school from the drop-down lists. The Administrative Unit Number (AUN) and school number will be prepopulated based upon your selection.

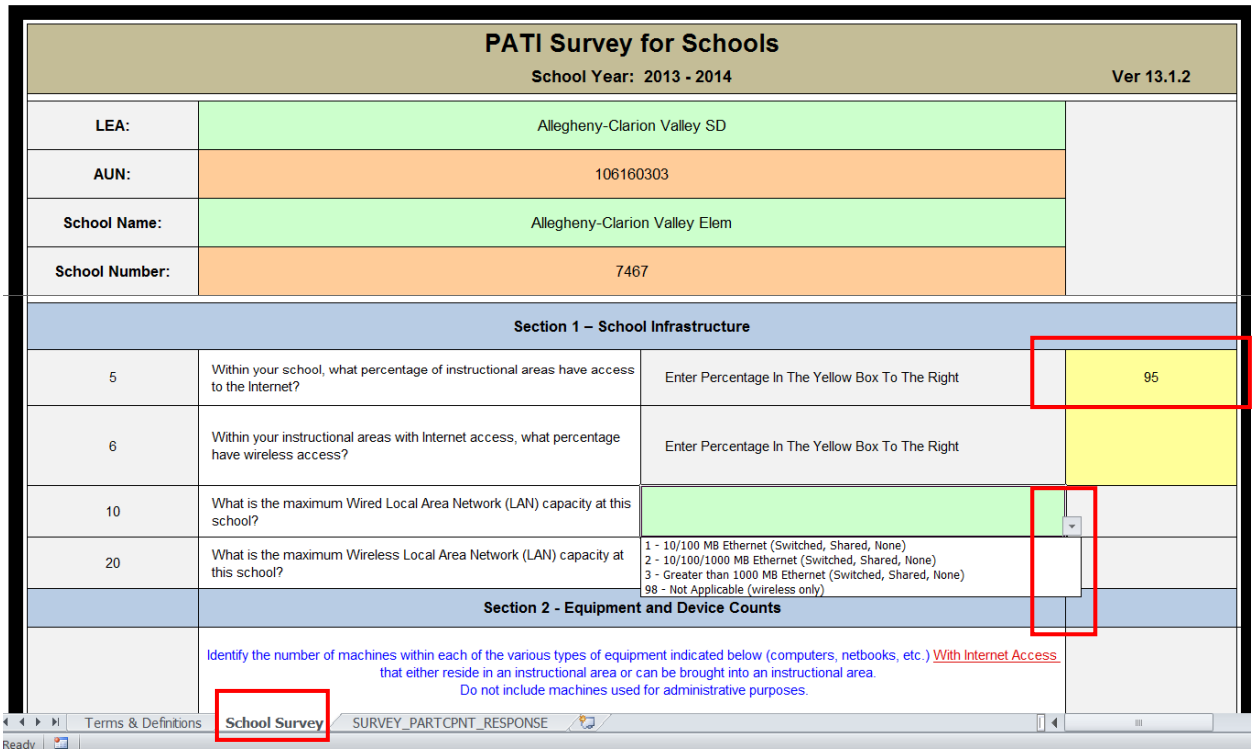


Figure 1: School Survey Sheet

The *School Survey* sheet includes formatting to indicate where responses are required; any cell shaded green (drop-down) or yellow (free form) requires a response. All of the questions require a response.

Most of the survey questions for schools 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.

Free form responses should only be entered when the cell is shaded yellow or 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.

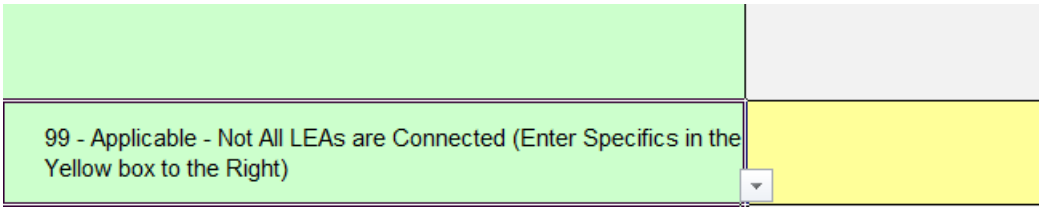
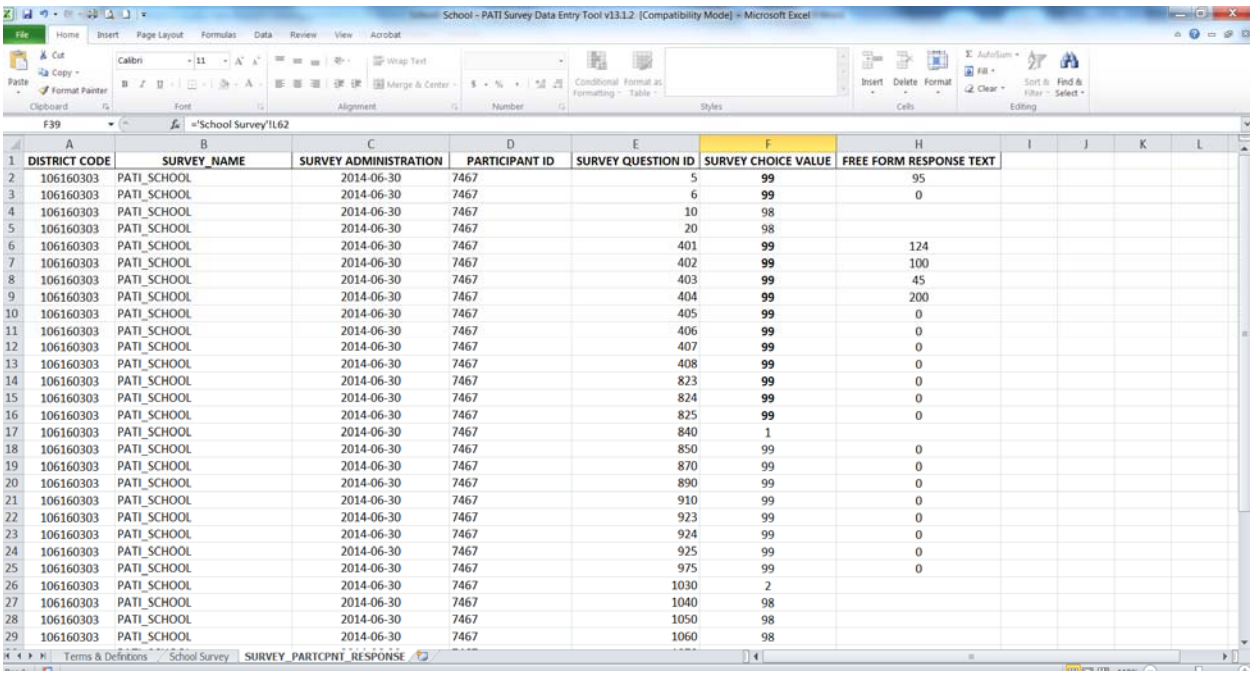


Figure 2: Conditional Formatting Example

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



DISTRICT CODE	SURVEY_NAME	SURVEY ADMINISTRATION	PARTICIPANT ID	SURVEY QUESTION ID	SURVEY CHOICE VALUE	FREE FORM RESPONSE TEXT
106160303	PATI_SCHOOL	2014-06-30	7467	5	99	95
106160303	PATI_SCHOOL	2014-06-30	7467	6	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	10	98	
106160303	PATI_SCHOOL	2014-06-30	7467	20	98	
106160303	PATI_SCHOOL	2014-06-30	7467	401	99	124
106160303	PATI_SCHOOL	2014-06-30	7467	402	99	100
106160303	PATI_SCHOOL	2014-06-30	7467	403	99	45
106160303	PATI_SCHOOL	2014-06-30	7467	404	99	200
106160303	PATI_SCHOOL	2014-06-30	7467	405	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	406	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	407	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	408	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	823	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	824	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	825	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	840	1	
106160303	PATI_SCHOOL	2014-06-30	7467	850	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	870	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	890	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	910	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	923	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	924	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	925	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	975	99	0
106160303	PATI_SCHOOL	2014-06-30	7467	1030	2	
106160303	PATI_SCHOOL	2014-06-30	7467	1040	98	
106160303	PATI_SCHOOL	2014-06-30	7467	1050	98	
106160303	PATI_SCHOOL	2014-06-30	7467	1060	98	

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 below instructions. 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. Click SAVE AS

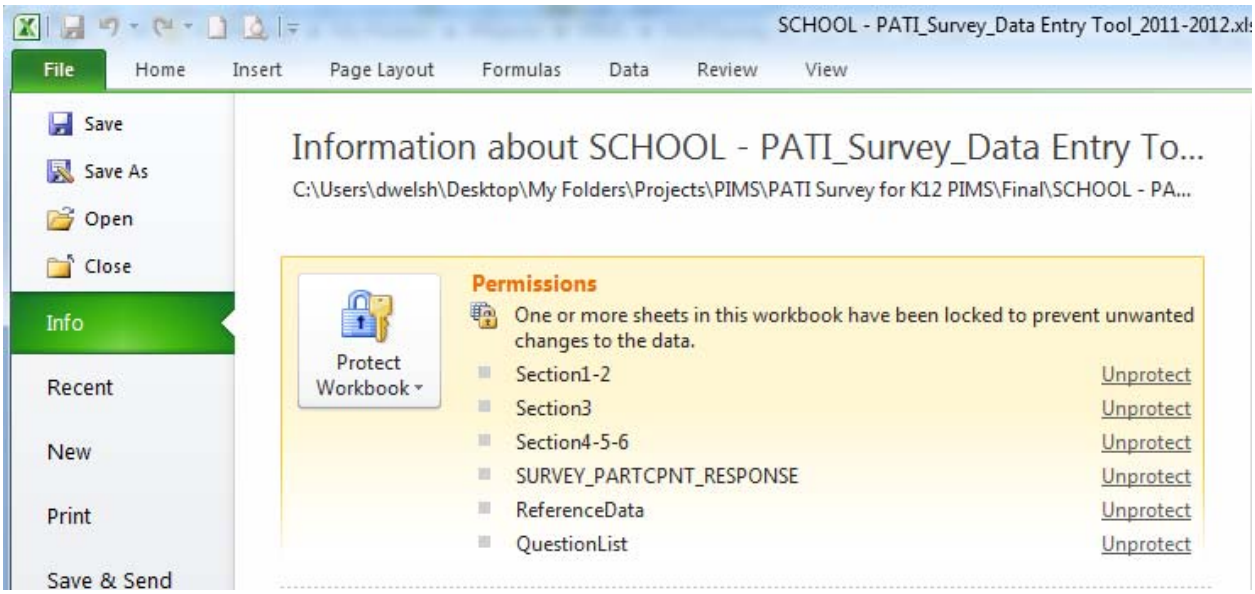


Figure 5: Saving the Survey Results as a CSV – part 1

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: "201408251030"
- File Type
  - As shown in Figure 5 - 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.

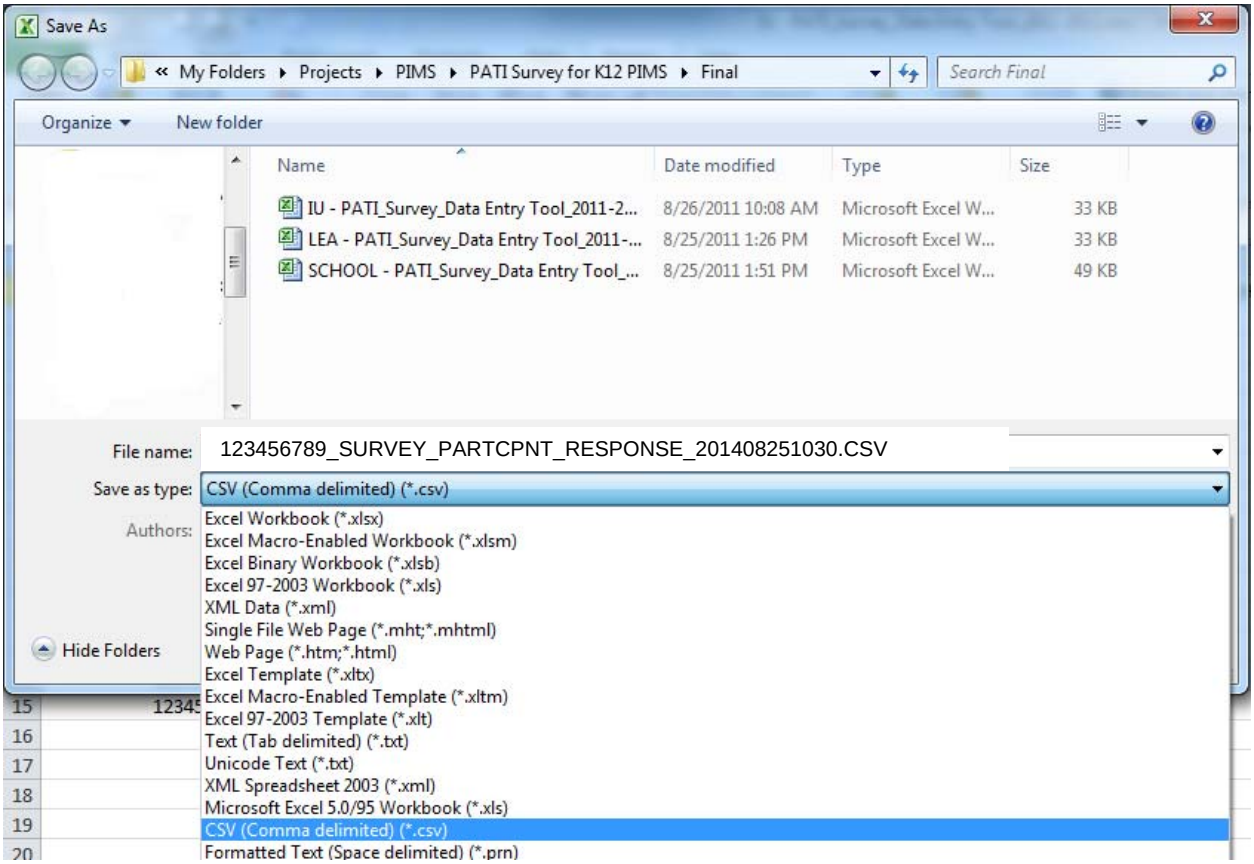


Figure 6: Saving the Survey Results as a CSV – part 2

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".