

## 4 MAKING BATCH ENTRIES

### 4.1 Overview

This option allows you to make a “batch” of similar entries by working down a list of schools. This can be a time-saver, because it eliminates the need for calling up individual school screens.

Batch Entry Selection Page

Batch entries can be made to update district information (the first column in the screen shot above), school information (the middle column), or schools’ grade fields (the third column).

To use this option, first determine which of the three sets of data you will be updating – district, school, or grade. Then within that column, which field or fields you need to update. Note that it is possible to select more than one field within one set of data, but you can not select one value from each of two columns at the same time. To select multiple fields on one column to update, hold down the **Ctrl** key as you click on the two or more field labels. Don’t select District Name or School Name unless you need to make changes to these fields. The district and school names always will be displayed by default.

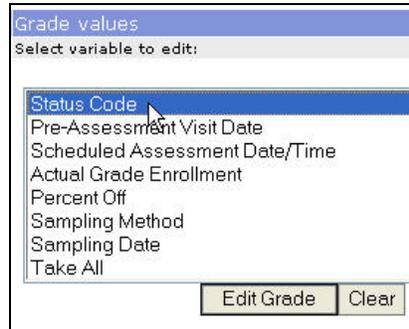
To explain how to use this option, we will work through the steps using an example of updating status codes for several schools.

### 4.2 Using Batch Entry to Update Status Codes

We will walk through the steps you will follow to update status codes for several schools.

**Step 1.** Select the value or field to be changed or updated.

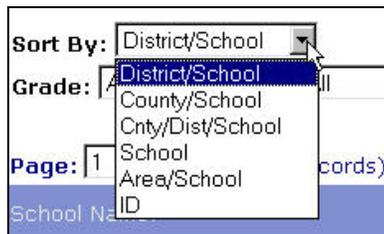
In this case, we select the Status Code value. Then, click on the **Edit Grade** button.



Selecting Status Code to Update

**Step 2.** Locate the school(s) to be updated.

All schools within the region will be displayed sorted by district. However, if you want to change the list, that option is available.

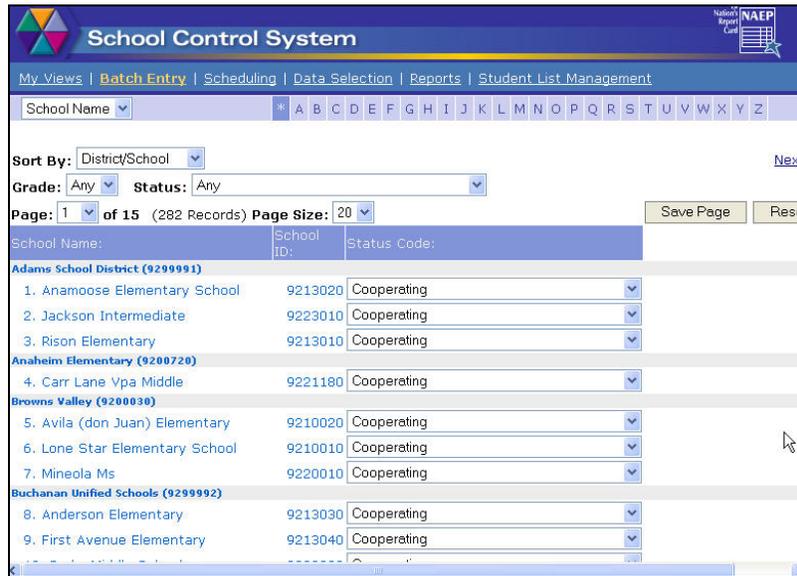


The sort order can be changed to:

- Schools by county,
- Schools by their county and district,
- Alpha sort by school name,
- Schools by their geographical NAEP area,  
or
- Schools by their NAEP ID.

The list can be subset to only one grade level and also subset to one of the status codes.

A sample of the sort by district (the default) is shown below.



Batch Entry Updating Status Codes

Using this sort, schools within a district can easily be located. If you want to search for schools beginning with the same letter, use the alpha tabs at the top of the screen.

**Step 3.** Change or Update the value.

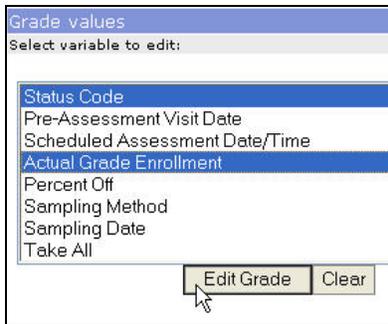
Click on the **Down Arrow** button next to the “Status Code” field for the school, and select the correct status code. As an alternative, with the status field highlighted, if you type the first letter of the status you want entered, the system will display the entire code. Press the **Tab** key to move to the next school.

**PLEASE NOTE:** After you have updated information on one screen or page, you must click on the **Save Page** button before going to the next page of listings or returning to the main **Batch Entry** screen. If you do not, your changes will **NOT** be saved.

**4.3 Using Batch Entry to Update Multiple Fields**

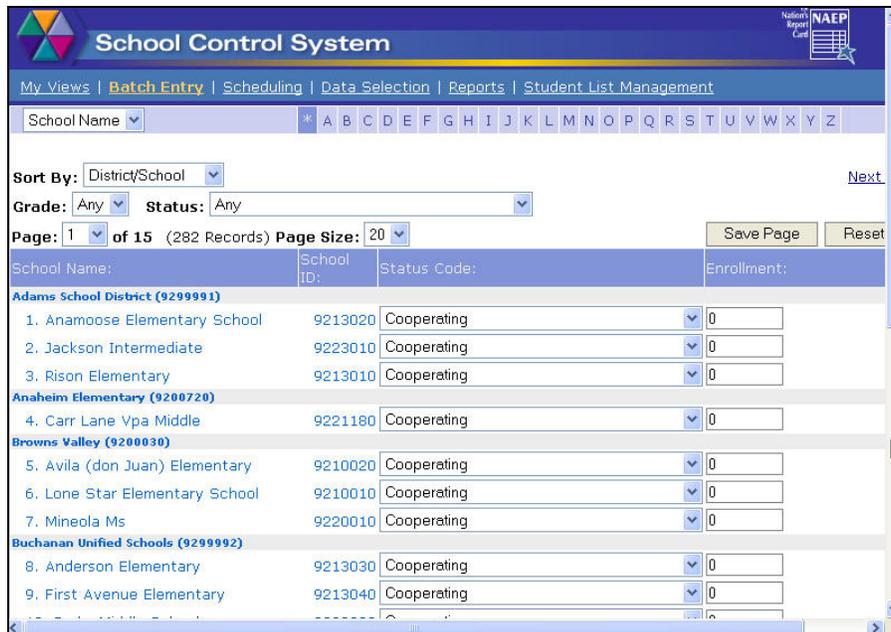
If you want to select more than one field to update, you can do so, but only within one of the values panels – district, school, or grade. You cannot select one value from the school list and one from the grade list.

To select more than one field, click on one field and then, while holding the **control** key, click on the next field. In the example below, we have selected two values in the school files to update – status code and actual grade enrollment.



Batch Entry Multiple Selection

After double checking your selections (remember, you might need to scroll up or down to see that both have been selected), click on the **Edit School** button.



Batch Entry Updating Fax Number and School Principal

Both fields will be listed. If the fields are too wide to be displayed on the screen, you may need to scroll to the right.

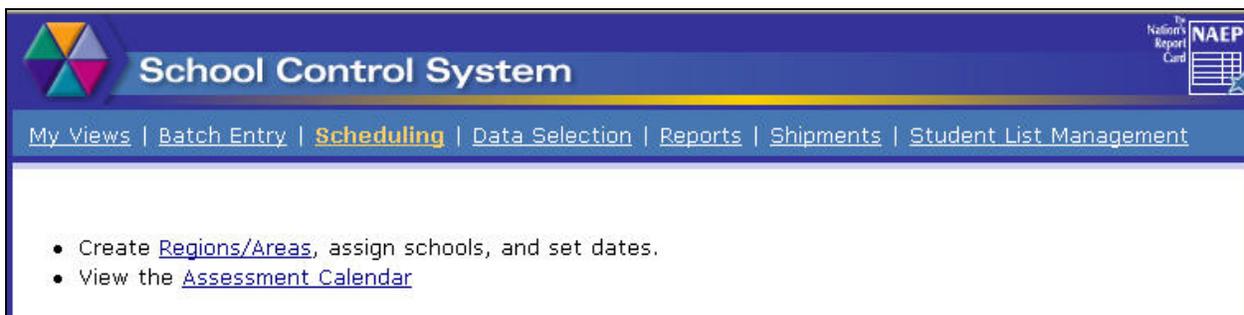
Don't forget to click on the **Save Page** button before leaving the screen. After making your updates, you can return to the main Batch Entry selection screen by selecting Batch Entry from the menu choices at the top of the screen.

## 5 SCHEDULING

### 5.1 Overview

Currently, there are two options available when you select the Scheduling menu option.

- An option that field managers have been using for developing regions and areas and assigning assessment dates.
- Viewing the calendar showing assessment dates for your Region/Area; and



Scheduling Selection Screen

It is unlikely that you will use the assessment date option.

Clicking on “Calendar” will take you to the six-week assessment calendar.

### 5.2 The Calendar

The schedule for all of the schools in a region and area can be viewed in the calendar. Displayed are the school’s name, number of sessions, the NAEP ID, and the school’s status. The calendar for each region and area you are responsible for should be checked carefully and frequently as you contact schools and discuss assessment dates. Public and nonpublic schools are displayed so you can see the entire schedule for a region and area.

A sample of a calendar is shown below.

Mon	Tue	Wed	Thr	Fri
Jan 24	Jan 25	Jan 26 DC Umoja Christian Academy 1111223 Sessions: 1 PreAssessDate: Pending	Jan 27 DC Village Learning Center Public Charter School 1110110 Sessions: 1 PreAssessDate: Pending	Jan 28
Jan 31	Feb 1 DC Hine Junior High School 1120220 Sessions: 1 PreAssessDate: Pending	Feb 2 DC Marshall Thurgood Elementary 1111160 Sessions: 1 PreAssessDate: Pending	Feb 3 DC Hardy Middle School 1120310 Sessions: 1 PreAssessDate: Pending	Feb 4 DC Slowe Elementary School 1110460 Sessions: 1 PreAssessDate: Pending
Feb 7	Feb 8 DC Ludlow Taylor	Feb 9 DC Reed Elementary	Feb 10 DC Takoma Elementary	Feb 11

Sample Assessment Calendar

Field managers, state and TUDA coordinators, and home office staff will be checking the calendars. As you determine that a school is not eligible to participate (closed, does not have the sampled grade, or does not have any grade-eligible students), its status should be updated as soon as possible and its assessment date removed.

Schools will only be displayed on the calendar if they have an assessment date recorded in the SCS and their status code is one of the following: Pending, Pending Cooperation, Cooperating, or Interim Refusal. Once a school's status is changed to a final refusal or ineligible, the school will no longer be displayed on the calendar.

**Remember**, you cannot actually change any information on the calendar. If you need to record a different assessment date for a school, you will need to go to the school's page and make the change there.

Information displayed on the calendar is:

- School name
- School's NAEP ID
- Number of sessions
- Preassessment date
- School's participation status

The school name is underlined indicating it is a hyperlink. If you want to go directly to a school's information, click on the school name and go to the school edit page.

If you want to print out the calendar, a "printer version" of the calendar is available. You will note in the upper left of the screen is the printer version hyperlink. The result will be more calendar and less header printed out. Return to the previous version by clicking on the link provided at the top of the calendar.

A "List of Events" is also available. This link will take you to a listing of schools for each day. The information will be the same as on the calendar simply organized in a different way as you can see below.

Date	School Name	ID	Sessions	Pre-Assessment Date
1/26/2005	<a href="#">Umoja Christian Academy</a>	1111223	1	None
1/27/2005	<a href="#">Village Learning Center Public Charter School</a>	1110110	1	None
	<a href="#">Village Learning Center Public Charter School</a>	1120060	1	None
2/1/2005	<a href="#">Hins Junior High School</a>	1120220	1	None
2/2/2005	<a href="#">Marshall Thurgood Elementary</a>	1111160	1	None
	<a href="#">Marshall Thurgood Elementary</a>	1120220	1	None

Calendar "List of Events"

## **6 DATA SELECTION**

### **6.1 Overview**

Using this option (previously labeled Mail Merge), an electronic file is created that can be used with another application, such as a word processor to generate individualized letters, mailing labels, etc. Its most powerful application is to generate specialized reports which can be exported and manipulated in Excel if you want to. It is this latter use that you might find of greatest benefit to you.

Using this feature, you will follow up to four steps as you:

1. Select the fields that you want to use;
2. Indicate how you want the data sorted (if necessary);
3. Indicate which of the records you want included (subsetting or filtering, if necessary); and then
4. View the results and create an electronic file of the data to be printed.

If you do not need to sort or subset the data, you can go directly from step 1 to step 4 and see the list of data that you have requested.

This section will guide you step by step in producing a report that is not available through the system's regular Reports menu option.

### **6.2 Creating an Area Status Report**

In this example, we will walk you through the process of creating a report that recruiting supervisors might find useful. This report will list all of the schools by name and NAEP ID that you are responsible for contacting in an area and will show you the scheduled assessment date for each school as well as its participation status. You will want to produce this report before you begin making your telephone calls for the day to be sure that you have the most up-to-date information for the schools that you are responsible for.

From the menu options at the top of the screen, select Data Selection.

#### **Step 1. Select Fields**

Steps:	1. Select Fields	2. Sort Fields	3. Subset/Filter	4. Preview/Export
Select the fields you want to be included in your custom letters/labels/reports. <span style="float: right;"><a href="#">Reset</a>   <a href="#">Next &gt;&gt;</a></span>				
<b>District Information</b>	<b>School Information</b>	<b>Grade Information</b>	<b>Session Information</b>	
<input type="checkbox"/> District Name	<input checked="" type="checkbox"/> School Name	<input checked="" type="checkbox"/> NAEP ID	<input type="checkbox"/> NAEP ID	
<input type="checkbox"/> District ID	<input type="checkbox"/> State School ID	<input type="checkbox"/> Sampled Grade	<input type="checkbox"/> Session ID	
<input type="checkbox"/> Dist Address 1	<input type="checkbox"/> MySchool Registration ID	<input type="checkbox"/> Target Stdnt Sample	<input type="checkbox"/> Sched Date	
<input type="checkbox"/> Dist Address 2	<input type="checkbox"/> Sch Address 1	<input checked="" type="checkbox"/> Status	<input type="checkbox"/> Classroom	
<input type="checkbox"/> Dist City	<input type="checkbox"/> Sch Address 2	<input type="checkbox"/> Pre-Assessment Visit Date	<input type="checkbox"/> Makeup Date	
<input type="checkbox"/> Dist State	<input type="checkbox"/> Sch City	<input checked="" type="checkbox"/> Scheduled Asmt Date	<input type="checkbox"/> Makeup Status	
<input type="checkbox"/> Dist Zip	<input type="checkbox"/> Sch State	<input type="checkbox"/> Original/Substitute	<input type="checkbox"/> Original Sample	
<input type="checkbox"/> Dist Phone	<input type="checkbox"/> Sch Zip	<input type="checkbox"/> Estimated Enrollment	<input type="checkbox"/> Total in Sample	
<input type="checkbox"/> Dist Fax	<input type="checkbox"/> Sch Phone	<input type="checkbox"/> Actual Enrollment	<input type="checkbox"/> New Enrollee Sample	
<input type="checkbox"/> Dist Comment	<input type="checkbox"/> Sch Fax	<input type="checkbox"/> TakeAll	<input type="checkbox"/> Students with Names	
<input type="checkbox"/> Dist FlgTuda	<input type="checkbox"/> County	<input type="checkbox"/> CompletedESample	<input type="checkbox"/> Withdrawn/Ineligible	
<input type="checkbox"/> Dist smalldst	<input type="checkbox"/> My Sch Name	<input type="checkbox"/> New School Check Required	<input type="checkbox"/> To Be Assessed	
<input type="checkbox"/> Superint Prefix	<input type="checkbox"/> Sch Type	<input type="checkbox"/> Completed New School check	<input type="checkbox"/> Assessed	
<input type="checkbox"/> Superint Fname	<input checked="" type="checkbox"/> Region	<input type="checkbox"/> Num of Stdnts on SLF	<input type="checkbox"/> Absent	
<input type="checkbox"/> Superint Lname	<input type="checkbox"/> Sch Comment	<input type="checkbox"/> SLF Completion Date	<input type="checkbox"/> Excluded	
<input type="checkbox"/> Superint Suffix	<input type="checkbox"/> Princpl Prefix	<input type="checkbox"/> SLF Receipt Date	<input type="checkbox"/> Refused	
<input type="checkbox"/> Superint Address 1	<input type="checkbox"/> Princpl Fname	<input type="checkbox"/> Substitute Exists	<input type="checkbox"/> Assessed in Original	
<input type="checkbox"/> Superint Address 2	<input type="checkbox"/> Princpl Lname	<input type="checkbox"/> PercentOff Track	<input type="checkbox"/> Assessed in Makeup	
<input type="checkbox"/> Superint City	<input type="checkbox"/> Princpl Suffix	<input checked="" type="checkbox"/> Area	<input type="checkbox"/> UPS Tracking Num from NCS-P	
<input type="checkbox"/> Superint State	<input type="checkbox"/> Princpl Phone	<input type="checkbox"/> Grade Refusals Form	<input type="checkbox"/> Date Sent from NCS-P	
<input type="checkbox"/> Superint Zip	<input type="checkbox"/> Princpl Email	<input type="checkbox"/> Grade Ineligible Form	<input type="checkbox"/> Date Recvd By SV	

### Data Selection Step 1

As it states at the top of this screen, in Step 1 you will select the fields you want to be included in your report. You will do this by clicking on the name of the field or in the small box in front of it.

For this report, select the following fields:

- School Name
- Region:
- Area;
- NAEP ID;
- Status; and
- Scheduled Assessment Date. (Note that this is not “session” date.)

The order in which you select these fields does not matter. You will set the sort order in the next step.

If you select any fields in the “Grade Information” column, you should also select NAEP ID. If you do not include NAEP ID, the system will include it for each row of data displayed in step 4. Many schools have the same name, but the NAEP IDs will be unique.

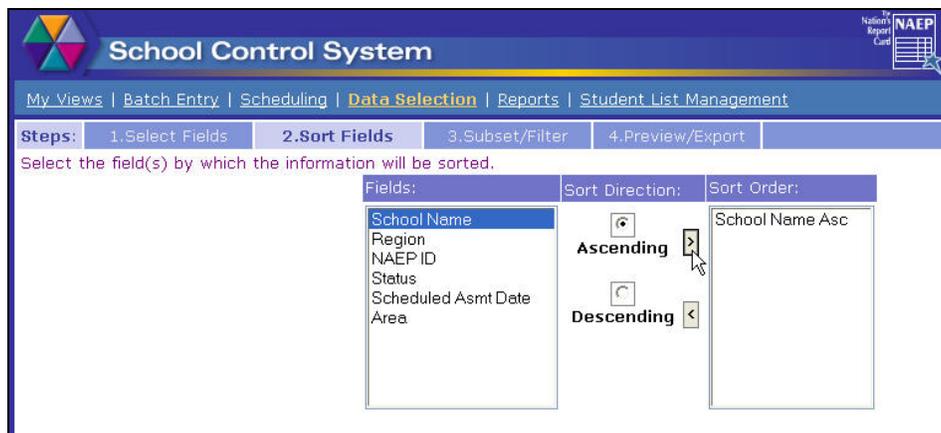
Next, click on the second tab and go to Step 2 in Data Selection.

## Step 2. Sort Fields

How do you want the report or list of schools sorted? We will sort the report by school status.

First, put the focus of the computer on the sort field by clicking on Status in the list under “Fields” (on the left of the screen). Next, click on the button with the right arrow (>) to indicate that you want to “send” that field into the box labeled ”Sort Order” (on the right of the screen).

Let’s select school name as our second sort order so that they are in alpha order on the list. Below, both of the selections that we have made are displayed in the “Sort Order” column.



Step 2: Select Sort Fields

If you make a mistake, or change your mind after copying a field from the list of fields to the “Sort Order” list, click on the field name in the “Sort Order” list and click on the left (<) arrow to remove it from the “Sort Order” list.

When you are finished with your selections here, go to Data Selection Step 3.

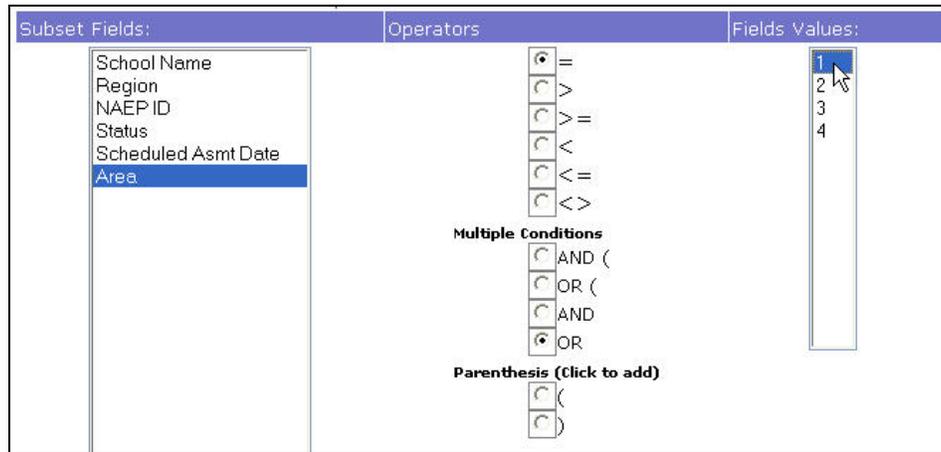
## Step 3. Subset File

In this step, you will tell the system that you want a report for only one area. You can come back and create a report for another of your areas after producing the first list.

As this step indicates, you will "subset" or filter the data so that the schools in only one area will be displayed.

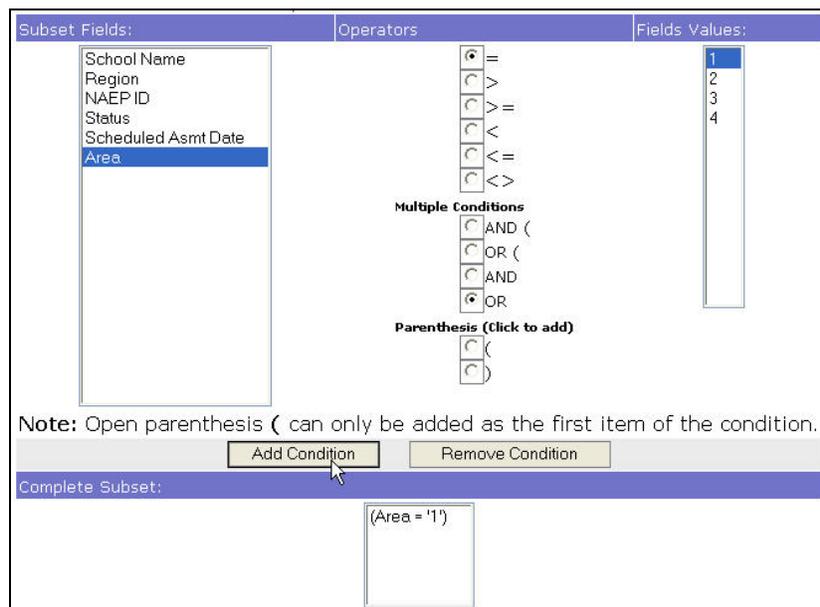
First, select the field "Area" (click on it). In the Field Values panel will be displayed all of the areas for which you are responsible in one region.

What you have created at this point is what you might call a statement or condition. In plain English this is that you want the list to be comprised only of schools for which area equals “1”. You didn’t need to select “equals” since that is the default option. The other symbols are explained below (Section 6.4) if you are not familiar with them.



First part of Step 3

Now, you need to complete the process by adding the statement or condition to the “Complete Subset” box. You do this by clicking on the **Add Condition** button. In the panel under that button you will see the full statement or condition that you have created.

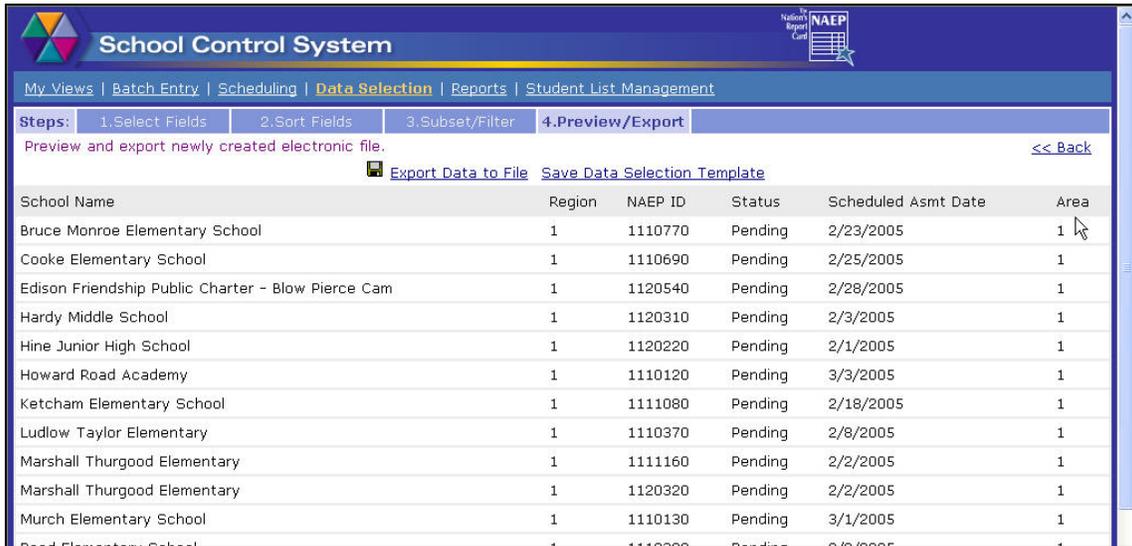


Adding the Condition to the Subset

Now we are ready to see the list, so go to step 4.

#### Step 4. Preview and Saving

Here, you can see the results of your efforts in the proceeding steps before you actually create the electronic file. If you need to modify something, you can go back to Step 3 or Step 2.



The screenshot shows the 'School Control System' interface. At the top, there is a navigation bar with 'My Views | Batch Entry | Scheduling | Data Selection | Reports | Student List Management'. Below this, a 'Steps' bar indicates the current step is '4. Preview/Export'. The main content area displays a table of school data with columns for School Name, Region, NAEP ID, Status, Scheduled Asmt Date, and Area. The table lists several schools, all with a status of 'Pending' and a scheduled assessment date in 2005. At the top of the table, there are links for 'Export Data to File' and 'Save Data Selection Template', along with a '<< Back' link.

School Name	Region	NAEP ID	Status	Scheduled Asmt Date	Area
Bruce Monroe Elementary School	1	1110770	Pending	2/23/2005	1
Cooke Elementary School	1	1110690	Pending	2/25/2005	1
Edison Friendship Public Charter - Blow Pierce Cam	1	1120540	Pending	2/28/2005	1
Hardy Middle School	1	1120310	Pending	2/3/2005	1
Hine Junior High School	1	1120220	Pending	2/1/2005	1
Howard Road Academy	1	1110120	Pending	3/3/2005	1
Ketcham Elementary School	1	1111080	Pending	2/18/2005	1
Ludlow Taylor Elementary	1	1110370	Pending	2/8/2005	1
Marshall Thurgood Elementary	1	1111160	Pending	2/2/2005	1
Marshall Thurgood Elementary	1	1120320	Pending	2/2/2005	1
Murch Elementary School	1	1110130	Pending	3/1/2005	1
Wood Elementary School	1	1110220	Pending	2/9/2005	1

Preview of Report – Step 4

If your report looks all right, select the "Save Data Selection Template" option at the top of the screen. This will allow you to save the report format in the new "My Data Selections" tab so that you can very quickly recreate the report for this area any time you want to run it again on up-to-date data.

When you click on Save Data Selection Template, a small dialog box will open giving you the opportunity to give your report a name. Enter the name and click on **Save**.

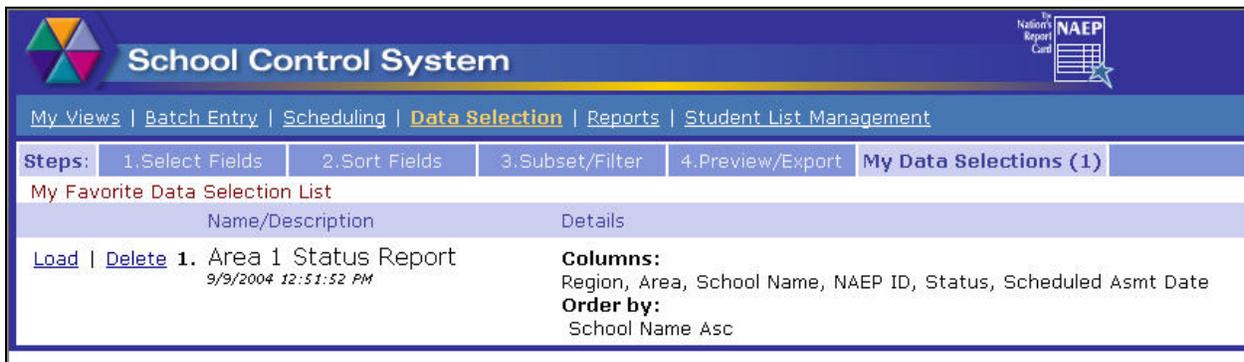


Naming and Saving Custom Data Selection

You should print out this report before going any farther. Click on the print icon at the top of the screen (being sure that your printer is connected and turned on.)

Web sites unfortunately do not always print out very well. It is quite possible that, at a page break, part of a line will print at the bottom of one piece of paper and part of it on the top of the next page. An option would be to save or “export” the report to an Excel file and print it from Excel. (See Section 6.5)

Now that you have saved this report as one of your data selections, you can access it any time you need to by clicking on the My Data Selection tab. Below is an example of how the listing of saved data selections will be displayed.



My Data Selections

Select **Load** to get a report showing you the most recent report of the status codes and assessment dates for Area 1.

### 6.3 Creating an Area Status Report for another area.

If you want to create a status report for another area, you can easily do so. Go back to step 1 of the Data Selection process by clicking on the tab labeled Step 1 Select Fields. As you will see, the fields that you originally selected will still be selected. Go through the steps until you get to the step 3 so that you can select a different Area for your next report.

In Step 3, you will need to remove the condition Area = 1 so that you can create a new condition of Area = 2. To do this, highlight the condition you created for the first report and then click on the **Remove Condition** button.



Removing the Condition “Area=1”

Then, return to the top part of the screen and create the condition Area = 2 and click on the **Add Condition** button.

Then, in step 4, if the report looks right, you can save it in My Data Selections. This time, you should save it as “Area 2 Status Report”.

## 6.4 Explanation of Data Selection Symbols

If you are not familiar with the symbols used in Step 3, subsetting the fields, they are explained below.

=	Equals (the default)
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
<>	Does not equal

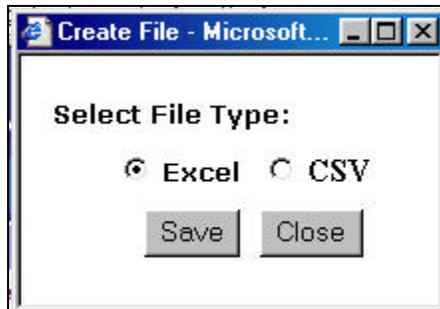
If you are familiar with these mathematical symbols, you are also aware that they are not displayed completely accurately within the SCS. However, it is not always possible to use the actual mathematical symbols when designing screens such as this.

The other symbols are for use by those with programming backgrounds who will produce more complex “conditions.”

## 6.5 Export Data

After you have created a report with Data Selection, you can save the entire report in an Excel file. While the option discussed in Step 4 (section 6.3) saves the format (“condition”), the “Export Data” option saves the actual data that you have put in a report.

With the report displayed in Step 4 of the Data Selection steps, click on the “Export Data” link at the top of the screen. A small dialog box will appear asking if you want to save an Excel or CSV file.



Excel is the default. The file type CSV (for “comma separated values”) is a format that can be used by a wide variety of applications (including Excel). Saving the file in Excel will make it immediately available to you.