Tip Sheets for Running the Macro

Steps to Request Files from Data Manager to Export to Macro

1. **LOG ON**
   - Go to: **http://www.bdi2datamanager.com**
   - Use your administrator log-in and password or another log-in that has administrative privileges

2. **COLLECT YOUR INFORMATION**
   - Click **Import/Export** tab located on the top right of the menu bar
   - Click **Export** in the drop down menu
   - Look under **Select File to Export** on the left hand side of the page
   - Click **Student and Assessment Summary**
   - Under **Selected Organization**, click on the group of students you would like to include in your file
   - Under **Select File Delimiter**, **Tab** is the default setting
   - Enter your email address
   - Choose **Export Beginning Date**:
     - **04/01/2021** (to capture all children's entries that have been done 3 months prior to entry into the program)
     - **04/01/2023** for current school year (to capture all children's entries that have been done 3 months prior to entry into the program)
   - Choose **Export Ending Date**:
     - Use **Today's** date if in the middle of a reporting period
     - Use **06/30/2024** when the reporting period is finished
   - Leave **Select Program Note Criteria** blank

3. **PREPARE TO EXPORT**
   - Click on **Schedule Export**

4. **WAIT**
   - The Import/Export Schedule queue will appear, showing the status of the requested report
   - You will receive an email from Riverside almost immediately acknowledging your request. **Exported downloads may take a few minutes or up to 24 hours**

   * While waiting for the documents to finish, you must click out of Scheduled Queue, because if you stay on that location, it will not show progress. *

5. **REPEAT**
    - Export the **Assessment Domains** files by repeating Steps #2 through 4. **Note**: Use the SAME range for beginning and ending export dates as you used for the **Student and Assessment Summary** file

You will receive another e-mail when the file has been imported and is ready to be downloaded.

6. **CHECK**
    - Click on **Import/Export** on the tool bar and **Scheduled Queue** from the drop down menu
    - Scroll to the bottom of the page, and the reports requested will have a **Finished** Status

Steps to Down Files From Data Manager to Macro

1. Log onto the Data Manager using your administrator log-in and password: www.bdi2datamanager.com
2. Click on the **Import/Export** tab located on the top right of the menu bar
3. Click on **Scheduled Queue** in the drop-down menu. You will see the two files you requested at the bottom: **Student and Assessment Summary** and **Assessment Domains**
    - Be sure you select the files with **TODAY's** date
    - Be sure it says **FINISHED** next to each file

4. Start with **Student and Assessment Summary:**
    - Click on the **blue arrow** icon on the far right, under **Actions**
5. A dialogue box will ask if you want to Open or Save:
    - Choose **Save AS**, and to your **DESKTOP** (or it may automatically download to your **downloads** folder)
    - Click **OK**

REPEAT
1. To access the **Assessment Domains** files, go back to the **Data Manager**
2. Repeat Steps #2-5

NEXT – UNZIPPING FILES
1. Go to your **downloads** folder
2. **RIGHT** click on the Student and Assessment file
3. Click **Extract** or **Extract All**. (Depending on the unzipping software you have on your computer)
4. A box will appear with the **RIVARBEPAPP01**file
5. You may close that box by clicking the X in the top right corner

REPEAT
1. Repeat to unzip Assessment Domains file by following the steps above.

 * *When you are finished with running the Macro, remember to go to you download folder and delete the zipped files.*

Importing Data Manager Files into the Excel Macro Template/ (Running the Macro)

PREPARE TO IMPORT:
1. Open the Excel macro template found on the TATS website
2. **Steps to Access the Macro Excel Spreadsheet**
   - *Go to your Download file and ensure that you delete all previous downloads of the BDI2 macro excel file*
   - Go to the TATS website (https://tats.ucf.edu)
   - Click on **Child Outcomes** under in the **Evaluation & Assessment from** home page
   - Click **For Excel 2007 and later** under **Data Clean** up heading
   - Click file to OPEN to access the file
   - **DO NOT** change or alter the file name of the template if you save it

3. When you open the file, the program **may** ask if you want to disable or enable macros. **ENABLE MACROS** in order for the macro to run.
   There may be a Security Warning near the top of the screen, which states: "Macros have been disabled."
   - Click on the **Options** box
   - Click on **Enable this content**.
4. At the bottom of the macro excel spreadsheet, there will be three tabs: **Student and Assessment Summary**, **Assessment Domains**, and **Run Macro**.
5. Click on **Student and Assessment Summary.**

TO IMPORT STUDENT and ASSESSMENT SUMMARY:
1. Place cursor on the top, left box of the table, **A1.**
2. From the horizontal menu at the top of the screen, select the **Data** tab.
3. Click on the **From Tex**t option in the *Get External data* section.
4. Find the **Student and Assessment** file in your download file
5. Keep double clicking until you get the **Student and Assessment Summary** file
6. Click the **Import**, and then the Text Import Wizard dialogue box to open.

Text Import Wizard Dialog Box
1. **Text Import Wizard Step 1.** Leave the default settings as they are:
   (Original data type: delimited, Start import row: 1, File origin: 437: OEMUnited States). Click **Next**.
2. **Text Import Wizard Step 2**: **Delimiters** tab is checked. Click **Next**
3. **Text Import Wizard Step 3**, **CHANGE** the **Child ID** column data format to **Text** and leave all other columns as **General** (default setting). Click **Finish**

Import Data Dialog Box
1. An **Import Data** dialog box will pop up. You should be looking at a small box with "=A1". Verify that the **Existing worksheet** radio button is marked. Click **OK**

REPEAT

Click on the **Assessment Domains** tab at the bottom of the macro excel spreadsheet. Repeat the steps above using the **Assessment Domains** file that you downloaded.

REMINDER: Do not make any modifications to these worksheets. Any changes (i.e., adding or deleting columns) may result in the macro working improperly.

RUNNING THE MACRO

1. Click **Run Macro** tab at the bottom of the macro excel spreadsheet
2. Choose **Pre-K**. While the macro is running, your screen may flash/blink several times
3. When the screen stops flashing, and has two new tabs (Results/Abridged Results) your macro is complete
4. **Important!!** Do a file **"Save As"** and include the **current date** in the file name

Note: Be sure to delete the imported files and the macro template from your download file. Download a new macro template from the TATS website with each use.

Possible Issues while running the Macro

1. If receive the message below after clicking the button to run the Macro, your file name has changed. This may be due to having more than one copy of the Macro on your computer. Go to your Downloads file and delete all previous versions of the Macro and download the file again from the TATS Website.
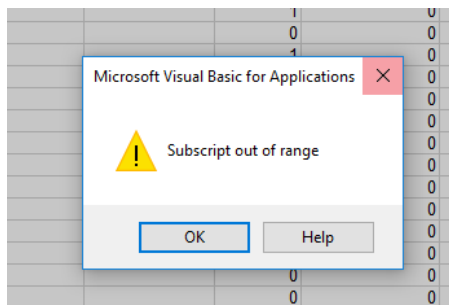
Or, delete all of the copies in your download file, except for the one that is named:

 (Yours may or may not have an M after xls)

2. If the dates on the two reports don't match, the examiner field will possibly say NO MATCH.
   Click on the filter button in the SCHEDULED QUEUE after each report that was pulled to ensure that the dates are matching on both reports. If they don't, run them again with matching dates.

Knowing and Customizing Your Macro

The columns to become familiar with in the **Abridged Results** are as follows:

Column Letter	Heading	Purpose	Common Errors
A	Child ID	LEA generated 10 digit unique ID	Too many/not enough numbers
B	Child ID Length	Indicates if the ID is the correct digits	Too many/not enough numbers
C	First Name	Child's legal first name	Nicknames, misspelling
D	Last Name	Child's legal last name	misspelling
E	Date of Birth	Date of birth	Wrong date
F	Assessment Type	Screener or full assessment	Duplicate records
G	First Test Date	Highlighted RED if an Exit is **not** necessary	Only applies to Macro run at the beginning of Exit Window
H	Examiner	Assessment examiner/team	Old data points entered
I	Program Note	Internal notes-25 characters (examiner name, transfer, etc.)	
J	Program Note 2	FCOMS data point-entry/exit(will be highlighted yellow if incorrect or blank)	Incorrect option or blank
K	Program Note 3	May be used for local purpose	
L	Program Note 4	May be used for local purpose	
M	Program Note 5	May be used for local purpose	
N	Adaptive DQ Score	Ensure scores are within range	Scores less than 55 or more than 145
O	Personal/Social DQ Score	Ensure scores are within range	Scores less than 55 or more than 145
P	Communication DQ Score	Ensure scores are within range	Scores less than 55 or more than 145
Q	Adaptive Screener Raw Score	Ensure scores are within range according to cut score	
R	Personal/Social Screener Raw Score	Ensure scores are within range according to cut score	
S	Communication Screener Raw Score	Ensure scores are within range according to cut score	
T	NormType	Ensure that Exit and Entry have matching norm types	Entry and Exit Norm Types don't match

Notes:

    a. **If you hide columns they WILL be included if printed, creating a giant spreadsheet that will not fit on one page. Therefore, the number of pages printed will be enormous.**

    b. **If you delete columns to customize your macro for printing, the columns adjust and the column letters change.**

Hiding Columns	Deleting Columns
o Place cursor on the column header (**letter**) to delete. An arrow will appear. o **Left click**, and the column should highlight. o **Right click**, scroll down the choice box and **left click** on **Hide.**	o Place cursor on the column header (**letter**) to delete. An arrow will appear. o **Left click**, and the column should highlight. o **Right click**, scroll down the choice box and **left click** on **Delete.**

Hiding Multiple Columns	Deleting multiple columns:
o **Left click** to highlight a column as above. o Hold **left click** down and scroll left or right to highlight columns to be deleted. Do a few at a time if it is easier. o **Right click**, scroll down the choice box and **left click** on **Hide.**	o **Left click** to highlight a column as above. o Hold **left click** down and scroll left or right to highlight columns to be deleted. Do a few at a time if it is easier. o **Right click**, scroll down the choice box and **left click** on **Delete.**

CHECKING DATA FOR ACCURACY AND ERRORS

Checking primarily for:
- accuracy of the Child Identification numbers
- accuracy of the point of entry/exit
- DQ/screener scores are within range
- identification of children needing exits
- Norm Type for entry/exit match

Identifying Children Transitioning from Part B to Kindergarten

- **Column G-First Test Date: If the Macro is run at the beginning of the Exit Window and no Exits have been conducted as of yet, the children that are highlighted in Red, will not require a BDI2 exit for FCOMS purposes**

To Isolate a Group by Date of Birth (for current reporting period)
1. Filter spreadsheet by "DateOfBirth" column.
2. Hide/delete children born **before** September 2, 2018
3. Hide/delete children born **after** September 1, 2019
This will not include children remaining in Pre-K an additional year.

Add Filters to your data
- Place cursor in box **1**. An arrow will appear.
- Left click to highlight all headers.
- Click **Filter** or **Sort & Filter** (top right-depending on your Excel version)
- Click **Filter** – drop down arrows will appear in all boxes.

Sorting Data after adding Filters
A. To Sort By Child ID Length
- Click the drop down arrow next to **Child ID Length**.
- Click **Sort A to Z** or **Smallest to Largest**

What to Look For
➢ Child IDs with fewer than 10 characters/digits
➢ Child IDs with more than 10 characters/digits
➢ Children with NO ID.

What to Do
➢ **Make any necessary corrections in the Data Manager** as changes made to the spreadsheet will NOT be reflected in the online system

B. To Sort by Data Point of Entry/Exit Using Program Note 2
- Click the drop down arrow next to **Program Note 2**
- Click **Sort A to Z** or **Smallest to Largest**

What to Look For: LEA

➢ Part B Entry
➢ Part B Exit
➢ 0: Ineligible
➢ 1: Other: Not for Child Outcomes
➢ 3: Early Entry Part B

What to Do

➢ Look for any entries that are **NOT** correct

➢ **Make any corrections in the Data Manager**. Any changes made to the spreadsheet will NOT be reflected in the online data manager system.

C. Sorting Data by Domain DQs
- Ensure all domain/screener scores are within the acceptable range
- Ensure that records have scores in all 3 required domains

Note: A child receiving a "refer" on a screener domain must continue with a full BDI-2 in that domain within the 14 day window. Please ensure a process is in place or ask your TATS facilitator for assistance.

Steps to Sort by Domain
1. Click the drop down arrow next to **Adaptive DQ Score**.
2. Click **Sort A to Z** or **Smallest to Largest.**
3. Be sure scores are within range (see table below).
4. Follow above steps for each domain.

Domain DQ Score

Adaptive	55-145
Personal/Social	55-145
Communication	55-145

<u>Ensure that Norm Type of entry and exit match</u>

Custom Sorting your Macro (Sort by Entry/Exit by student)
- At the Home Tab, click on Sort/Filter
- Click on Custom Sort
- A dialogue box will appear; ensure that **My Data has headers box** is checked
- Click on **Add Level** Twice so there are three blank levels showing
- The first level drop down box you will select **DateofBirth**
- The second level drop down box you will select **LastName**
- The second level drop down box you will select **FirstName**

Be sure that both Entry and Exit NormType match (1-1 or 2-2)
All Entries done after 10/1/16 must be NormType 2

Tip Sheets for Running the Macro

For any questions or issues, please contact your TATS Regional Facilitator:

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