SDQblockchain - Advanced User Guide

Note: Please use Google Chrome or Firefox Internet browser to avoid incompatibility issues. This guide uses Chrome.

This guide is for users of SDQblockchain working at organisations where large amounts of assessment may take place e.g., schools, colleges, medical facilities. They are likely to have multiple cohorts (groups of young people) which need regular maintenance and updating.

To build large cohorts quickly and efficiently, the focus will be on creating cohorts from spreadsheets, as well as backing up cohorts for security reasons and to enable new cohorts to be generated using existing data.

The Youthinmind team is grateful for your feedback on this User Guide. Let us know how we can improve this User Guide by emailing us on the sdqplus@youthinmind.com email address.

1 Naming your cohort for schools or larger groups

The naming of your cohort is very important. In a school you might reference the class and academic year, e.g., class 7A becomes **7a-2021-22**. Alternatively, you could use the graduation year e.g., the high school seniors would be in a cohort named **2022**.

If working with a therapy group or list of patients, the first name initial and surname of the therapist could be used e.g., Barbara Brown would be **bbrown**. If assessing patients at different locations, the place name could be added e.g., **bbrown-meadowside**.

You must make sure your naming approach is consistent e.g., use all lower-case or all capitals, not a mixture of both. Spaces can be problematic as it can be hard to tell whether one or multiple spaces have been used. If you need to break up sections of the cohort name, use hyphens (**-**) or full stops/periods (**.**) instead.

Important: You must be able to recollect your cohort names to access them. Cohort names are case, punctuation and space sensitive. Make a note of the names of your cohorts and which user they belong to. The backup cohort tool, covered later in this guide, provides a physical record of the cohort and usernames on your own computer.

2 Importing Cohorts

2.1 When to import a .xlsx spreadsheet

You can create a cohort by importing data from an .xlsx spreadsheet. This allows you to create the cohort quickly instead of having to manually type in the names and other details one by one. Recommended cohort size is between 10-50 young people, although cohorts of up to 500 young people are possible.

2.2 To prepare your .xlsx spreadsheet for import

Prior to creating cohorts, you need to create a suitable spreadsheet (.xlsx file) e.g., Microsoft Excel or Google Sheets. Each cohort will need an individual spreadsheet created.

Important: Do not use multiple sheets in a spreadsheet - only the data in sheet 1 will be imported.

In your spreadsheet you will need two columns of data with the column headings **Field0** and **Field1** in cell A1 and B1. **Field0** can be student identification, student admission number or student initials. **Field1** might be surname, initials or whatever will allow you to identify students.

It is up to you to decide what is entered in the **Field0** and **Field1** columns. You need to identify the individuals without error and without revealing too much information to maintain privacy. The import function will only work with column headings **Field0** and **Field1**. Other column headings will not work unless you are re-importing a backed-up spreadsheet - more on this later. Note that the first character of 'Field0' and 'Field1' is capitalised and there are no spaces.

	A	B	C
1	Field0	Field1	
2	418242	Alexandra B	
3	307091	Andrew L	
4	358708	David B	
5	356089	Hajra A	
6	785949	James H	

The import function will add data to a cohort in SDQblockchain and automatically assign a PlusIID for each young person. The PlusIID is essential for identifying and organising assessment for each young person it belongs to.

2.3 To Import your cohort

1. Log into SDQblockchain using your **UserID** and **password.**

Important: Please read section 1 Naming your cohort for schools or larger groups. You must be able to recollect your cohort names. We are not able to recover lost cohort names - this is to comply with data protection regulations. The backup cohort tool, covered later in this guide, provides a physical record of the cohort and usernames on your own computer.

2. Click the **SHOW** text located next to **Import a file**. A new row of windows will appear as shown below.

3. Click the **Choose file …** button located to the right of **Import xlsx file**.

4. Select a spreadsheet (.xlsx file) you have created in line with the structure explained in section **2.2 To prepare your .xlsx spreadsheet for import**.

5. Enter the name you want to call your cohort in the **Cohort name** field and click **OK**.

A new cohort will be created from your spreadsheet. Each young person now has a 16-digit PlusIID (unique identifier) which links to their SDQplus account (where assessment is stored). Note that the cohort will be sorted by whatever is used in the Person_ID (Field0) column.

6. To finalise the import, click the red outlined **Save imported cohort button.**

3 To backup cohorts

3.1 Why backup a cohort

You should always backup a cohort each time a significant change is made to it e.g., when records are added or deleted. A backup cohort provides a spreadsheet duplicate containing the young people's personal details and PlusIIDs, the details of the user responsible for the cohort, the cohort name, and a time serial number of when the cohort was created. This is very important as these details provide a safeguard against cohorts being lost.

Another reason for backing up a cohort is that a user will often need to add or remove young people to and from it e.g., someone joins/leaves a class or group. The user is then able to make changes to the backup spreadsheet, which can be re-imported, maintaining existing data and allowing new individuals to be added.
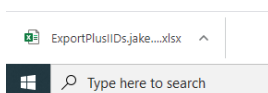
3.2 To backup a cohort

1. You should be logged into SDQblockchain and viewing a cohort.

2. Click the **Backup cohort** button to the right of NeoV Cohort.
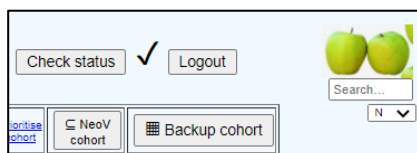
3. Click **OK** when prompted ("Cohort is ready").
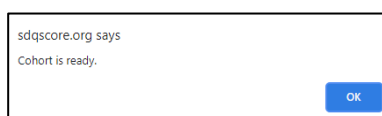
4. This backup can be opened as a spreadsheet from the bottom left corner of the SDQblockchain page (**ExportPlusIIDs.**) or from your **Download**s folder.


Note: You can only backup cohorts to a spreadsheet that uses the .xlsx format e.g. Microsoft Excel. Also be aware that if your system does not allow downloads, you will need to select the "Open with" option and save the backup manually to a location of your choice.

5. A spreadsheet version of the cohort will appear. Column C now contains the PlusIIDs for each young person. It is recommended that you resize your columns so that all data is clearly displayed. The spreadsheet can then be saved in the normal manner to a location of your choice.

	A	B	C
1	Field0	Field1	PlusIID
2	480774	Kamila S	7293-1968-3747-9738
3	254584	Vicky T	6768-3914-9803-9765
4	418242	Alexandra B	1481-2527-0039-7814
5	785949	James H	1484-0712-4843-2266
6	544416	Paula W	1449-7542-4062-3065

If you choose to save the spreadsheet without opening it first, it will automatically be filed in the location your computer stores downloads. In the example below the spreadsheet has appeared in the Downloads folder. You can see that the user (jakesmith) and cohort name (wbs-7a-21-22) are included in the file name along with a time serial number (1631026463360) showing the time when it was backed up. The time serial number is always included at the end of the file name.
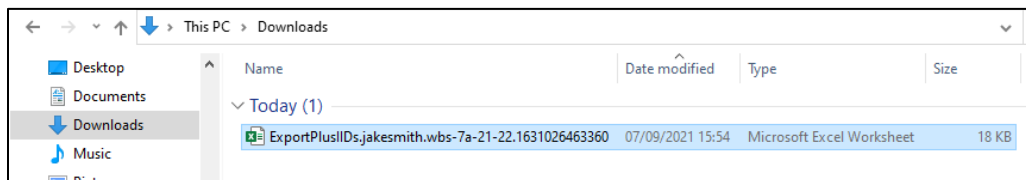

Note: You can see how this naming system helps as the user and cohort name are clearly identified. You can also backup the same cohort multiple times without overwriting it due to the time serial number being automatically generated at the end of the file name.

3.3 To prepare a backup .xlsx spreadsheet for import

You may need to import backup spreadsheets into SDQblockchain to create new cohorts e.g., a school has a class or academic year that needs to be created for the following academic year. Existing students will need to retain their PlusIIDs, new children will be added while children that have left will be removed.

1. Find the file location the backup cohort spreadsheet was saved in and use **copy** and **paste** to create a duplicate, so you do not lose the original backup data.

2. **Rename** the duplicated spreadsheet e.g., **7a-20-21** becomes **8a-22-23**. In the example below the time serial number has been removed, some users may want to add a date when in the process of renaming.
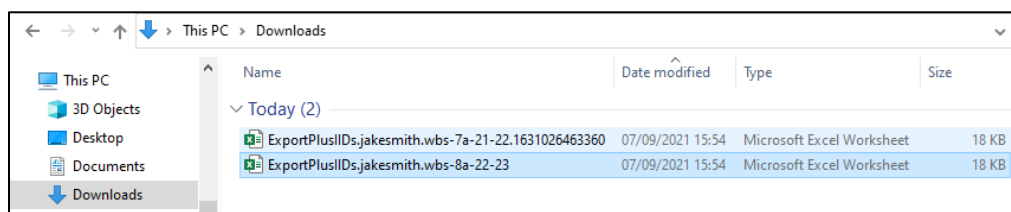
Note: It is recommended that an organisation keeps backups stored safely. This is so you can recall previous cohort names and PlusIIDs if required. Always use the backup file which was created latest.

3. Once the file has been renamed you can open it and modify the data required. In the example below I am **deleting** the students **Alexandra B** and **James H** as they have left the school.

Note: Deleting records from a spreadsheet does not mean that these students lose their PlusIID data and assessments. If they ever need to be recalled the user can load an older cohort containing their details.

4. You can also add new children to the cohort. Here I am **adding** the students **Omar S** and **Robbie K** by entering their relevant details. I do not add a PlusIID as they have never had an SDQplus account set up before.

13	622357	John H	9080-8675-7019-6722	
14	328970	Richard L	1147-9986-5840-6914	
15	345678	Omar S		
16	234567	Robbie K		

If you are adding new records to a cohort to be imported to SDQblockchain, you must first check whether the child/young person has an existing PlusIIDs. This includes new individuals joining a cohort who may have existing PlusIIDs generated while at another school or therapy group. If they do have existing PlusIIDs then you can manually enter these PlusIIDs underneath the PlusIID heading in column C. If you are 100% sure that the new entries have not got existing PlusIIDs, then you can fill in their details in the respective cells underneath Field0 and Field1, leaving the PlusIID field empty as shown above to ensure that automatic PlusIIDs are generated on re-import.

Note 1: You must not rename the column headings or sheet names within the spreadsheet. Only the relevant details for Field0 (Person_ID) and Field1 (Personal_details) can be updated or added, along with valid PlusIIDs in the PlusIID column.

Note 2: A PlusIID enables access to an individual SDQplus account, where all assessment for that individual is stored. If you generate a new PlusIID for a young person with an existing PlusIID, then their existing assessment is not included. This does not mean that it is deleted (it still exists under the original PlusIID), but that future assessment will be attributed to the new PlusIID, splitting the assessment data.

5. When you have made the necessary changes, you can **save** and **exit** the spreadsheet.

3.4 To re-import a backup spreadsheet

The modified spreadsheet now needs to be re-imported into SDQblockchain to ensure the new cohort links the appropriate PlusIIDs and SDQplus accounts.

1. If you are viewing a loaded cohort log out of SDQblockchain and log back in. This is to avoid accidentally overwriting the existing cohort or adding unwanted records to it.

2. Once you are logged into SDQblockchain (and not viewing an existing cohort), click **SHOW** next to **Import a file**.

3. Click **Choose file** beside **Import xlsx file** and select the relevant spreadsheet that needs to be re-imported.

4. Enter a **new cohort name** in the Cohort name field and click the **OK** button. Note that the young people within the cohort all maintain their existing PlusIIDs and assessment, while the new individuals have new PlusIIDs.

Import xlsx file	Choose file	ExportPlusII...a-22-23.xlsx	**Save imported cohort**	HIDE

N	Person_ID	Personal_details	PlusIID	Edit	Del	SDQ^{plus}	iSDQ	Exp	Vis	NeoV	Rpt	Status
1	234567	Robbie K	1126-2176-2111-9485	✎	X	SDQ^{plus}	iSDQ	▦	👁	⊆	Rpt	undefined
2	254584	Vicky T	6768-3914-9803-9765	✎	X	SDQ^{plus}	iSDQ	▦	👁	⊆	Rpt	undefined

5. To finalise the import, click the red outlined Save imported cohort button.

6. Use **Backup cohort** to create a spreadsheet copy of the new cohort.