

SDQblockchain - Advanced User Guide

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

This section of the guide is aimed at users of SDQblockchain working at organisations where a large amount of assessment may take place, such as at a school, college or medical facility. Users at these organisations would typically deal with multiple cohorts representing classes, years or specific therapy groups. These cohorts are likely to require large scale updating on a periodic basis, such as when young people leave or join the organisation, or move into a new year, class or group.

While the SDQblockchain Basic User Guide involved manually creating and updating smaller cohorts, this section will focus on importing data from spreadsheets to generate cohorts automatically. It will also cover backing up cohorts, not just for security reasons, but also to enable new cohorts to be generated using existing data.

Note: The Youthinmind team is grateful for your feedback. Let us know how to improve this user guide at sdq.scoring@gmail.com.

1 Naming your cohort for schools or larger groups

The naming of your cohort is very important. If you are based in a school we would suggest the format **y7a-19-20**. The y7a stands for the year group and class, while 19-20 indicates the academic year. We recommend this or a similar naming standard. If you use y7a as the cohort name for the next academic year, the old y7a will be overwritten but the new academic year (e.g. 20-21) will differentiate it from the original. If you are assessing a number of schools, you may want to prefix the school abbreviation, e.g. Rocky Brook School would be **rbs-y7a-19-20**.

Alternatively, 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 a number of groups or patients at different locations, the place name could be added e.g. **bbrown-meadowside**. Finally, if working with multiple groups but at the same location, numbers could be added e.g. **bbrown-meadowside1**, **bbrown-meadowside2** etc.

Regardless of which cohort naming system you decide on, you must make sure your approach is consistent. For instance, use either all lowercase or all capitals, not a mixture of both. Spaces can also be problematic as it can be hard to tell whether one or multiple spaces have been used. If you do need to break up sections of the cohort name, to help with comprehension, use hyphens (-) instead.

Important: You must be able to recollect your cohort names. It is a good idea to write down and store securely the names of your cohorts and which user they belong to. The Backup tool, covered later in this guide, provides a physical record of the cohort and user names, but we still recommend that you keep your own notes to account for any anomalies.

2 Importing Cohorts

2.1 When to import a .xlsx spreadsheet

You can also create a cohort by importing data from an .xlsx spreadsheet. This may be classes in school, a therapy group or your patient list. Importing allows you to create the cohort quickly instead of having to manually type in the names and any other relevant details row by row. This method is highly recommended for larger cohorts and/or multiple cohorts.

2.2 To prepare your .xlsx spreadsheet for import

Before you can import data, you first need to set up a suitable spreadsheet (.xlsx file). Each cohort - class, group or patient list - will need an individual spreadsheet.

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

In each spreadsheet you will need two columns of data with the column headings **Field0** and **Field1**, as shown by the screen shot opposite. **Field0** can be student identification or student admission number; it can also be student initials. **Field1** might be surname, initials or whatever it is that will allow you to identify students unambiguously. Be aware that the shading used in the screen print is to draw your eye to the column headings and is not actually required for the import.

	A	B	C
1	Field0	Field1	
2	2212901188	Nadine A	
3	4803322968	Hajra A	
4	5420978697	David B	
5	6813907328	Alexandra B	
6	1539818525	James H	
7	1112543801	John H	
8	8982372783	Salih H	

It is entirely up to you to decide what data you want to enter in the **Field0** and **Field1** columns. The important thing to keep in mind is to be able to identify the individuals without error, but also without revealing too much information in order to maintain privacy. The import function will work with column headings **Field0** and **Field1** only. 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.

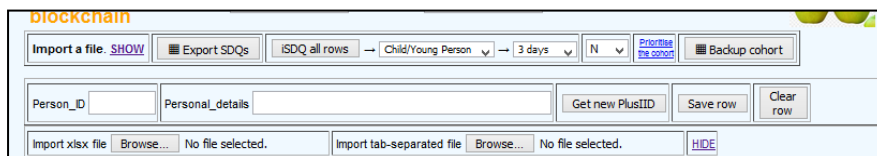
The import function will import the data you enter into the columns and automatically assign a PlusIID for each young person. The PlusIID is essential for tracking and organising any assessment for the young person it belongs to.

2.3 To Import your cohort

1. Log into SDQblockchain using an appropriate 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 recommend that you write down the name of your cohort(s) and keep them in a secure place. We are not able to recover lost cohort names - this is to comply with data protection regulations. Youthinmind has now incorporated the option to backup cohorts within SDQblockchain, which will provide a record for you, but keeping your own records is still highly recommended.

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



3. Click the **Browse...** button (or **Choose file** button, depending on your browser) 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. Your cohort will load and a dialogue window will display. Enter the name of your cohort in the **Cohort name** field and click the **OK** button. 16-digit PlusIDs (unique identifiers) will be created for each individual as shown in the screen shot below.

N	Person_ID	Personal_details	PlusID	Edit	Del	SDQplus	ISDQ	Exp	Vis	Rpt	Status
1	1112543801	John H	7935-9305-2324-9799		X	SDQplus	ISDQ			Rpt	undefined
2	1141998390	Kamila S	1095-9553-3188-4838		X	SDQplus	ISDQ			Rpt	undefined
3	1539818525	James H	3878-4802-3593-9433		X	SDQplus	ISDQ			Rpt	undefined
4	2212901188	Nadine A	1421-5541-2188-2938		X	SDQplus	ISDQ			Rpt	undefined
5	2473328179	Susan W	4821-5991-9231-7716		X	SDQplus	ISDQ			Rpt	undefined
6	2979305513	Piotr K	1141-4032-9979-1757		X	SDQplus	ISDQ			Rpt	undefined

6. To save the cohort click the red outlined **Save imported cohort** button. It is good practice to backup a cohort once it is imported or when it changes (see next section).

3 Backup cohorts

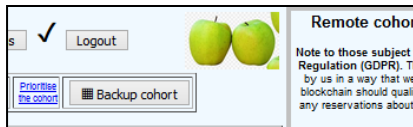
3.1 Why backup a cohort

While working on SDQblockchain 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 an organisation with a spreadsheet duplicate containing the young people's personal details and PlusIDs, 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.

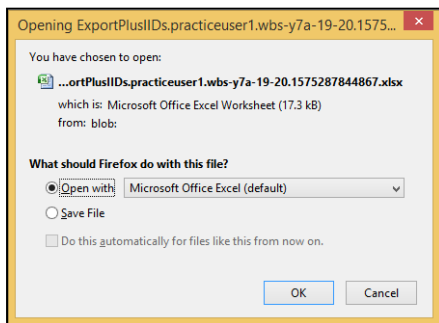
Another important reason for backing up a cohort is that a user will often need to add or remove young people to and from it e.g. someone joins/leaves a class or group. The user is then able to make changes to the backup spreadsheet, which can be re-imported, maintaining existing data and allowing new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



3. Click **OK** when prompted ("Spreadsheet ready for output or saving").
4. Choose the file format you want to open the spreadsheet with (e.g. Microsoft Excel) or save the file to your computer.




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. If you choose to open the spreadsheet you will notice that column C now contains PlusIDs. 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	PlusID
2	2212901188	Nadine A	1421-5541-2168-2936
3	4803322968	Hajra A	4842-6663-5170-9592
4	6813907328	Alexandra B	3417-1935-8504-3211
5	2979305513	Piotr K	1141-4032-9979-1757
6	3633803864	Simon R	7946-1019-1556-3006
7	9893938696	Richard L	2221-8150-2909-1115
8	3155660354	Vicky T	8602-6655-7821-0339
9	5420978697	David B	1359-2323-3327-0108
10	1539818525	James H	3678-4802-3593-9433
11	1112543801	John H	7935-9305-2324-9799
12	8158575678	Paula W	9587-2732-1628-7713
13	2473328179	Susan W	4821-5991-9231-7716
14	8982372783	Salih H	4851-0472-3164-8637
15	1141998390	Kamila S	1095-9553-3186-4838
16	9305675714	Andrew L	9761-1596-0219-6708

6. 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 and cohort name are included within the filename along with the time serial number showing the time when it was backed up. The time serial number is always included at the end of the filename.



Name	Date modified	Type	Size
 ExportPlusIDs.practiceuser1.wbs-y7a-19-20.1576616099345	17/12/2019 20:56	Microsoft Office E...	9 KB

Note: You can see how this naming system helps an organisation with future use of cohorts in SDQblockchain 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 filename.

3.3 To prepare a backup .xlsx spreadsheet for import

Organisations may be required to import backup spreadsheets into SDQblockchain at a later date. For instance, a school may have a cohort for a class or academic year (e.g. y7a-19-20) that needs to be created for the following academic year to represent the new cohort that the children are moving into (e.g. y8a-20-21). The user needs to ensure that the existing students retain their PlusIDs, while adding or removing students who have joined or left the cohort.

1. Find the file location the backup 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. y7a-19-20 becomes y8a-20-21. In the example below the time serial number has been removed, although some users may want to add a date when in the process of renaming (if it is re-backed up then the time serial number becomes very useful as a means to avoid overwriting existing backup cohorts).

Name	Date modified	Type	Size
 ExportPlusIDs.practiceuser1.wbs-y7a-19-20.1576616099345	17/12/2019 20:56	Microsoft Office E...	9 KB
 ExportPlusIDs.practiceuser1.wbs-y8a-20-21	17/12/2019 20:56	Microsoft Office E...	9 KB

Note: It is recommended that an organisation keeps backups stored safely. This is so you can recall previous cohort names and PlusIDs 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 Piotr K as they have left the school.

	A	B	C	D	E	F
1	Field0	Field1	PlusID			
2	2212901188	Nadine A	1421-5541-2168-2936			
3	4803322968	Hajra A	4842-6663-5170-958			
4	6813907328	Alexandra B	3417-1935-8504-321			
5	2979305513	Piotr K	1141-4032-9979-1757			
6	3633803864	Simon R	7946-1019-1556-300			
7	9893938696	Richard L	2221-8150-2909-111			
8	3155660354	Vicky T	8602-6655-7821-031			
9	5420978697	David B	1359-2323-3327-010			
10	1539818525	James H	3678-4802-3593-941			
11	1112543801	John H	7935-9305-2324-975			
12	8158575678	Paula W	9587-2732-1628-771			

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

If you are adding new records to a cohort that needs to be imported, it is essential that you first check whether they have existing PlusIDs. This includes new individuals joining a cohort who may have existing PlusIDs generated while at another school or therapy group. If they do have existing PlusIDs then you can manually enter these PlusIDs underneath the PlusID heading in the third column. If you are 100% sure that the new entries have not got existing PlusIDs, then you can fill in their details in the respective cells underneath Field0 and Field1, leaving the PlusID field empty to ensure that automatic PlusIDs 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 PlusIDs, in the PlusID column.

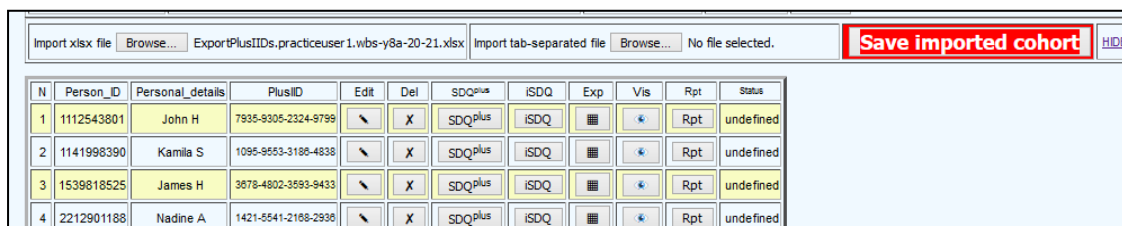
Note 2: A PlusID provides an assessment link to each individual in a cohort. If you generate a new PlusID for a young person with an existing PlusID, then the link to their previous assessment data is lost. This does not mean that it is deleted (it still exists under the original PlusID), but that future assessment will be attributed to the new PlusID, splitting 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 backup spreadsheet now needs to be re-imported into SDQblockchain to ensure the new cohort links to the appropriate PlusIDs belonging to the young people within it.

1. If you have a cohort already loaded we recommend that you 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 the **Browse...** button (or **Choose file** button depending on your browser) beside **Import xlsx file** and select the relevant spreadsheet that needs to be re-imported.
4. Your cohort will load and a dialogue window will display. Enter the 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 PlusIDs.



N	Person_ID	Personal_details	PlusID	Edit	Del	SDQ ^{plus}	ISDQ	Exp	Vis	Rpt	Status
1	1112543801	John H	7935-9305-2324-9799		X	SDQ ^{plus}	ISDQ			Rpt	undefined
2	1141998390	Kamila S	1095-9553-3168-4838		X	SDQ ^{plus}	ISDQ			Rpt	undefined
3	1539818525	James H	3678-4802-3593-9433		X	SDQ ^{plus}	ISDQ			Rpt	undefined
4	2212901188	Nadine A	1421-5541-2168-2936		X	SDQ ^{plus}	ISDQ			Rpt	undefined

5. Save the imported cohort by clicking the red outlined **Save imported cohort** button.