User's Manual

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PBISApps

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Overview

Who Should Use This Manual?

The purpose of the SDEX Manual is to provide SDEX users a quick reference and trouble-shooting guide. The manual is for use by anyone with an SDEX account and questions related to setup, downloads, and on-going use of the application. Much of the information found in this manual can be found directly in the SDEX application screens.

What is PBISApps?

PBISApps is a not-for-profit group, developed and operated by Educational and Community Supports (ECS), a research unit at the University of Oregon. The PBISApps team manages a series of educational tools related to the implementation of multi-tiered systems of support (MTSS). These tools include the School-Wide Information System (SWIS) Suite, PBIS Assessment, and PBIS Evaluation. These applications have been implemented in more than 25,000 schools in the US and abroad. PBISApps has been making schools safer and more productive places for over 10 years by empowering educators to make data-based decisions as problems emerge.

What is SDEX?

SDEX is an online application to export data across multiple schools into a single file. Set up one or more schools in a batch export. Use the data to create custom district-wide reports. Download data manually as needed or set up automatic downloads to happen regularly. SDEX is fully encrypted and available to use immediately at https://sdex.swis.org.
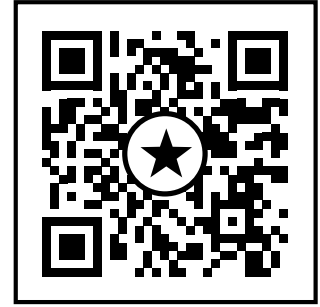
About the QR Codes

The QR codes in this manual direct you to video tutorials or additional content as supplements to the written instructions. To use the QR codes, you need a smartphone or tablet with internet access and software that can read and interpret the codes.

There are many free QR code reader apps found in your device's app store – for example, the Apple App Store for iOS, Google Play for Android, or Windows Phone Store for Windows Phone. To download an app, search "QR code reader" in the app store on your device and download.

All videos can be found on our website http://www.pbisapps.org by navigating to Resources > Video Tutorials in the main navigation.

An example of a QR code.

SDEX Accounts

All SDEX accounts are self-service: No paperwork is necessary. Set up an account online from start to finish within minutes. Using a preferred internet browser, type in the URL https://sdex.swis.org.

Create an Account

From the SDEX homepage:

1. Click the Create Account button.

2. Type the email associated with the SDEX account in the Email field.

3. Type the password for the account in the Password field and retype it in the Verify Password field.

4. Fill out the account profile by typing in the First Name, Last Name, Organization Name, Phone Number, and School/District information system name (if appropriate) in the affiliated fields.

5. Click Create Account.

6. The application sends a verification email to the email address listed during account setup.

7. Follow the steps outlined in the email to verify the account.

8. Log in at the SDEX homepage to access the newly created account!

Log In/Log Out

To log in, from the SDEX homepage:

1. Enter the email address and password associated with the SDEX account.

2. Click Login.

3. Click Continue.

To log out, click the Logout tab from anywhere in the SDEX application.

Schools

The Schools section is where users add or remove individual schools from the SDEX account. Select from authorized schools to create batch downloads. Schools with an authorization of No have opted not to allow access to their SWIS data through SDEX. *Note: For a school to be added, it must enable SDEX access from within its SWIS account; see Tip for more information.*

> **HERE'S A TIP**
>
> Schools authorize SDEX through their SWIS accounts. To add them to your account, you'll need an access code only someone with direct access to the school's School Settings can provide. When you're ready to add schools to your SDEX account, ask the school to enable SDEX access in SWIS:
>
> 1. From the Tools menu, click School Settings.
> 2. Click SWIS in the Applications menu on the left-side of the window.
> 3. Click District SDEX access under Data Integration.
> 4. Select Yes from drop-down menu to enable access to the SWIS data through SDEX.
> 5. Click Save.
> 6. An access code will appear. Copy the code and send it to the person in charge of the SDEX account.

Add Schools

To add new schools to an SDEX account:

1. Click the Schools tab at the top of the application.
2. Click Add.
3. Enter the School Access Code provided by the school. *Note: Dashes and spaces in the code can be omitted.*
4. Click Add to add the school or Cancel to return to the schools menu.
5. A green notification appears when the school is added successfully.

Remove Schools

To remove schools from an SDEX account:

1. Click the Schools tab at the top of the application.
2. Click to select the name of the school to remove from the list of school in the account.
3. Click Remove.
4. Click Yes to confirm. Click No or Cancel to return to the school list. Note: Removing a school from the School List does not delete the SWIS account or any data. Removing the school simply removes the school from the list as well as any batch downloads with which it was affiliated.

Batches & Downloads

Whether planning to download data from a single school or across multiple accounts, all downloads happen through this page. The Batches & Downloads homepage lists all batch download information including:

- **ID:** This is a unique identifier assigned by PBISApps to use when troubleshooting any issue related to the batch.
- **Batch Name:** The name the user assigns to the specific download
- **# Schools:** The number of schools included in the batch
- **# Records:** The number of referrals downloaded in the batch
- **Type:** The file type generated (XML v1, XML v2, CSV v1, CSV v2)

> **HERE'S A TIP**
>
> There are two types of files you can generate out of SDEX – XML or CSV. For each type, you choose to download the data in one of two versions: v1 (SWIS 4) or v2 (SWIS 5). All users should use v2 unless they have a need to download current data in the older, v1 (SWIS 4), format.

Add a Batch

From the Batches & Downloads tab:

1. Click Add.
2. Give the batch a name by typing the name in the Batch Name field.

3. Select a file type from the Download Type drop-down menu. (See note about file types.)

4. Optionally type a security code for the batch in the Security Code field if automatically downloading this batch. Leave this field blank if downloading the batch manually.

5. Select the earliest date from which data will be included in the file.

6. Select yes to include in the file; select no to omit it from the file:

   a. Student/Staff Names

   b. chool NCES ID

   c. Other, Extra Info, and Custom Fields

7. Check the box next to the name of authorized schools to add them to the batch. Note: Select as many schools as needed. At least one school must be included for data to download.

8. Click Add to add the batch or Cancel to return to the batch list.

Modify a Batch

To make an edit to an existing batch, click Batches & Downloads:

1. Click to select the batch to modify.

2. Click Modify.

3. Edit any of the information displayed.

4. Click Modify.

Delete a Batch

To delete an existing batch from the list, click Batches and Downloads:

1. Click to select the batch to delete.

2. Click Delete.

3. Click Yes to confirm the deletion. Click No or Cancel to return to the batch list. *Note: Deleting a batch from the batch list does not delete any SWIS account or data. Deleting the batch simply removes the batch from the list.*

Download a Batch

SDEX accommodates both manual, ad hoc downloads as well as automated, recurring downloads.

Manual Download

To download a file manually:

1. Click Batches & Downloads.

2. Click to select the batch to download. Note: Downloading batches with 0 records results in an error.

3. Click Download.

4. A ZIP file downloads with the following files:

   a. XML or CSV data

   b. SWIS lookup values – all referral categories and label IDs.

   c. (For CSV files only) Layout Reference – description of each referral field

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HERE'S A TIP

After selecting the batch to download, click Auto Download URL. Save this URL to copy and paste at any time into your preferred browser to download this batch file without going through the SDEX user interface!

Automatic Download

SDEX comes equipped with a URL for every batch to setup automatic downloads. To view the URL for any batch on the batch list:

1. Click Batches & Downloads.

2. Click to select the batch to download.

3. Click Auto Download URL.

4. A screen appears with the URL for the selected batch.

HERE'S A TIP

To setup an automatic download, three parts are necessary:

HTTP Download Utility

Several utilities can handle the download task. We recommend using CURL (http://curl.haxx.se/); it is free and available for most operating systems. Using CURL, from the command line, retrieve a batch with the following command:

```
curl --silent --output myFile.zip
```

Script

A script handles the order and execution of the tasks to build your automated job. This can be as simple as a small batch script, or a large complex PERL script. Because SDEX files are shipped as ZIP files, use something which can handle zip files in an automated way. An example script would likely do the following:

- Execute CURL to retrieve the file to a known location
- Pull the data file out of the ZIP archive
- Read in the data file
- Use the data in some determined way, such as loading it into a database
- Write comments to a log so that errors can be tracked

An example PHP-based script can be found at https://sdex.swis.org/reference/autoSdexDownloadScript.zip

Scheduler

With the script built, the final step is to use a scheduler to automatically execute it. This lets you download and parse your script on a regular basis. Most operating systems offer a task scheduler. For Windows environments it is Task Scheduler and in UNIX/LINUX it is the CRON JOB system.