

Elementary Schools: Federal Survey Cards

Version 4.2 • Updated August 14, 2012

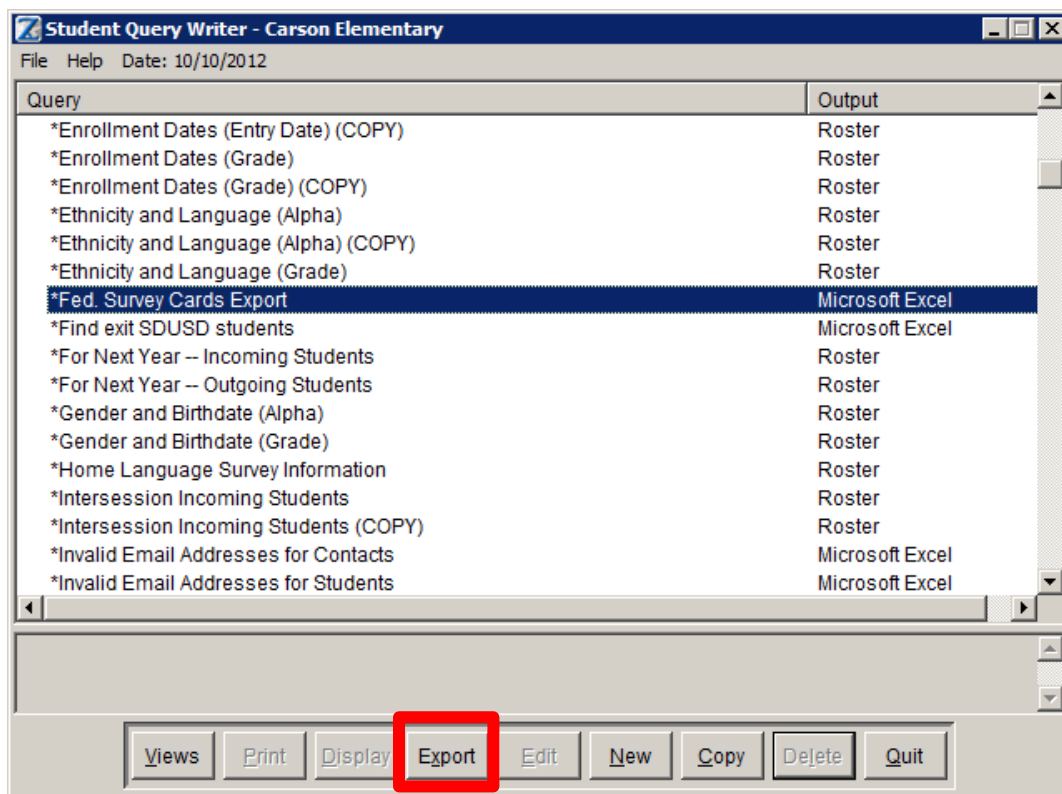
FOR USE WITH TRACKING
FEDERAL SURVEY CARDS

This job aid describes the steps Elementary School staff will need to follow in Zangle to create a spreadsheet using Microsoft Excel 2010. Some steps may be slightly different if using another version of Excel. This report will be used for tracking and collecting Federal Survey Cards. Both the cards and the report will be submitted to the Impact Aid Office. You will first export a Student Query Writer Report in Zangle, and then format it and save it. A link to a sample report can be found on page 11.

NOTE: This report will also be used to run labels and to track survey card collection. See the instructions for *Running Labels for Federal Survey Cards* at the end of this Job Aid.

RUN THIS REPORT ON THE SURVEY DATE FOR THE CURRENT YEAR.

1. Launch Zangle. Click Enrollment. Click Reports. Select Student Query Writer.
2. Scroll down the list of reports to select *Fed. Survey Cards Export. See screen shot below.

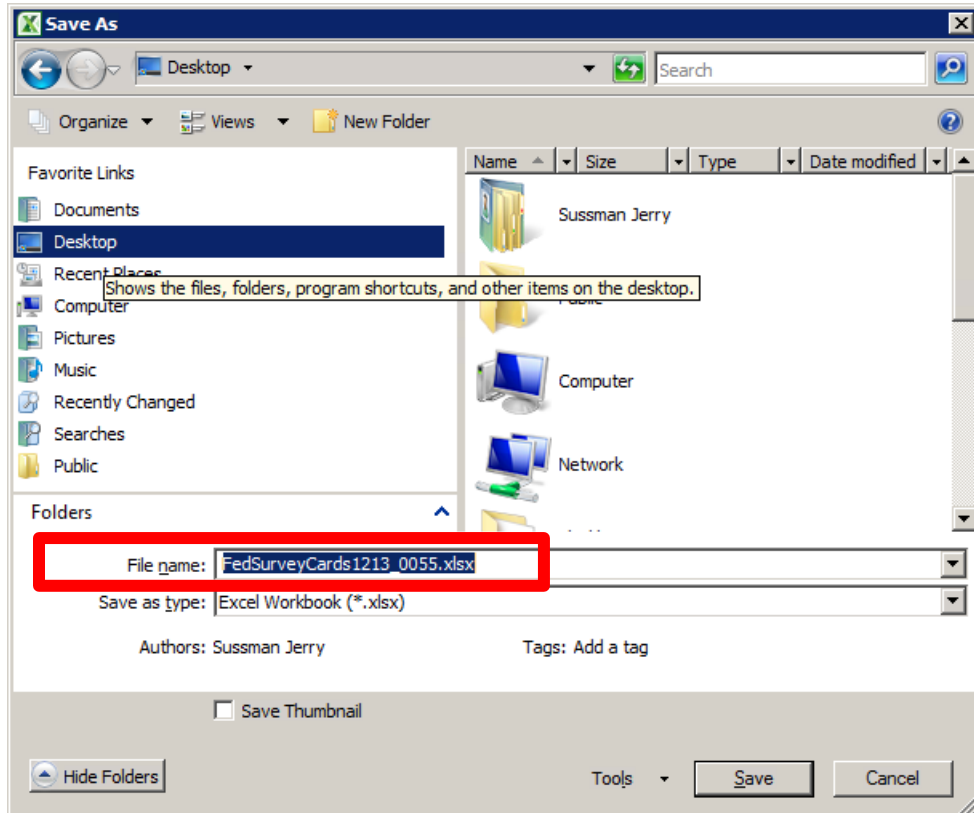


3. Click Export. (Microsoft Excel will open and the report will appear.)
4. Click the green File tab in Excel.
5. Click Save As.

6. Rename the file to read FedSurveyCards1213_cost center. See screen shot below. The .xls or .xlsx will automatically be added to the file.

Example: For 2012/13, if your cost center is 0055, your file should be titled:


FedSurveyCards1213_0055



(You're about to save this file, but before you do, either save it to your desktop or remember where you're about to save it to. Some users like to first create a new folder, titled **Federal Survey Cards** for example, to store this report and other related files.)

7. Save the file.

INSERT THREE COLUMNS:

- Select the first column of the report by clicking the **A** column heading. (The entire column will be highlighted.)
- Right-click and select **Insert**. (A new column will be inserted on the left side of the report.)
- Do this two more times for a total of three columns at the far left.
- Title the first column **ENRMT**.
- The second column will be a dividing column. Title it **BLANK**.
- Shade this second column gray by right-clicking the column heading (**B**) and then clicking the paint bucket icon  (Fill Color) and selecting a gray shade.
- Title the third column **HAVE CARD**. Bold these three titles. See screenshot below:

	A	B	C	D
1	ENRMT	BLANK	HAVE CARD	Last Name
2				Angulo
3				Black-Jones
4				Carr
5				Castillo

This will be used to track your cards.

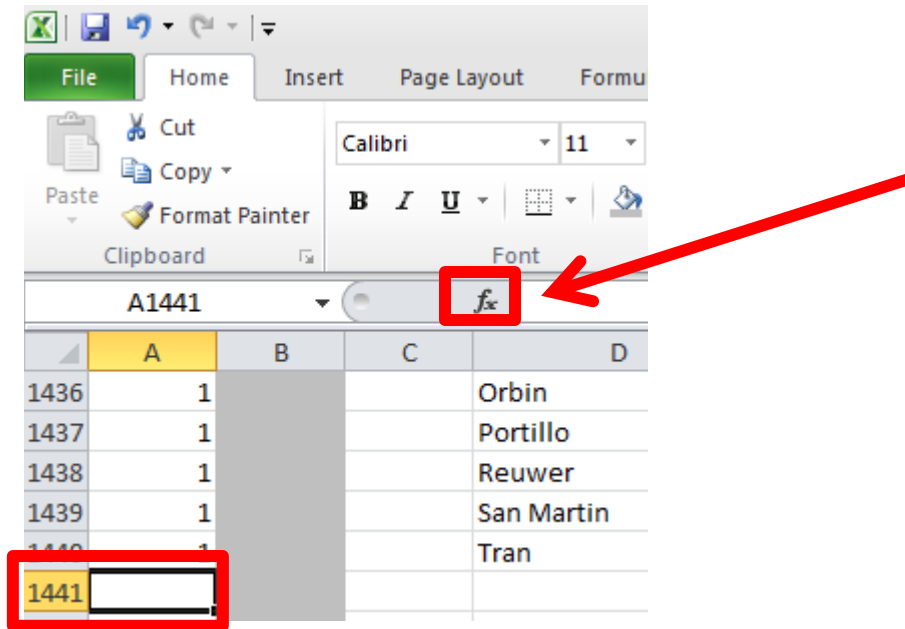
ENTER A 1 FOR EACH STUDENT IN THE ENRMT COLUMN.

One way to accomplish this is by entering a 1 for the first student, copy that field, highlight the ENRMT column from the second student to the very last student, and then paste.

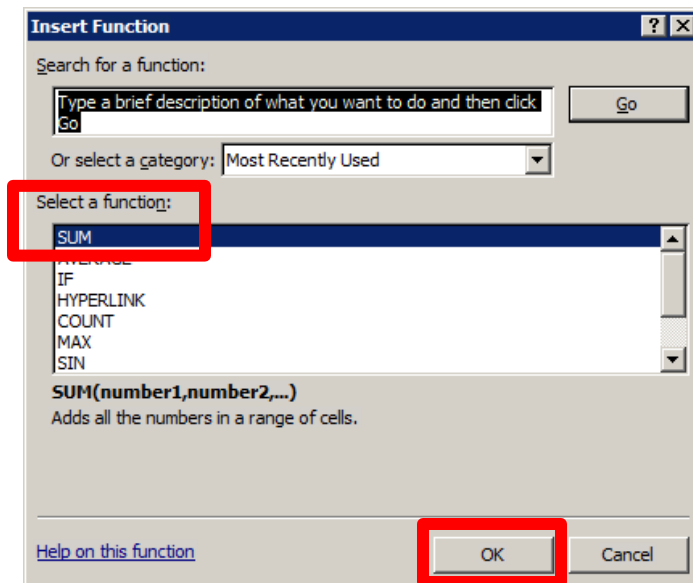
	A	B	C	D
1	ENRMT	BLANK	HAVE CARD	Last Name
2	1			Angulo
3	1			Black-Jones
4	1			Carr
5	1			Castillo

NEXT, TOTAL THE ENRMT COLUMN.

1. Click the cell after the last student in the ENRMT column on your report. In the example below that would be in cell A1441
2. Insert the SUM function. This can be done multiple ways. One way is to click the Insert Function icon as shown in the screen shot below:

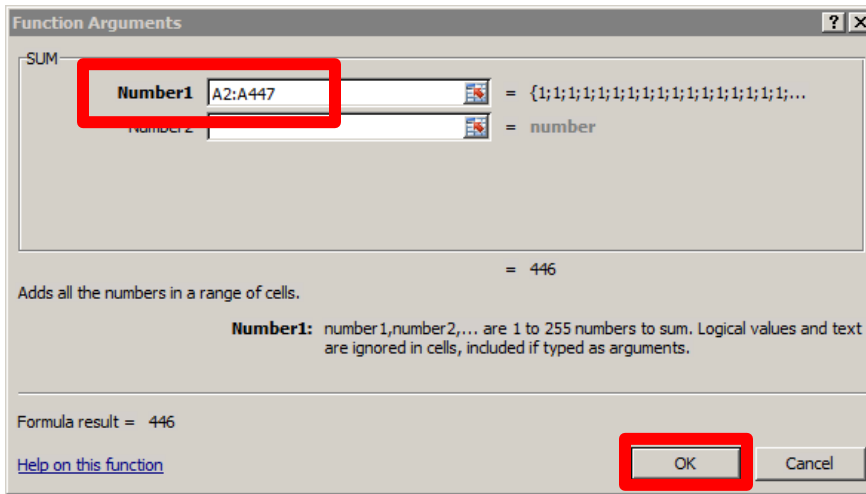


3. Make sure the SUM function is selected from the list.



4. Click OK. A new window will appear.

- In the **Number 1** field, it should be **A2** (the first cell you want totaled), then the last cell you want totaled, in this example it is **A447**. See the screen shot below. Your last cell number will be different. It will be the cell number of the last student on your report.



- Click **OK**. Your report should now have the total number of the **ENRMT** column as shown in the screen shot example below. Your total number will be different.

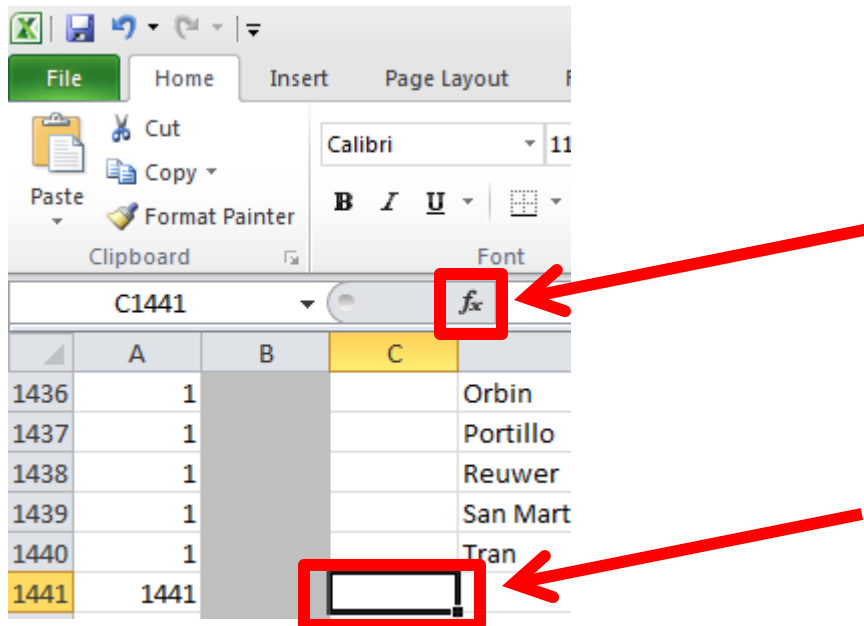
1437	1		Portillo
1438	1		Reuwer
1439	1		Schwartz
1440	1		Tran
1441	1439		

Inserted SUM function in cell after last student in the ENRMT column

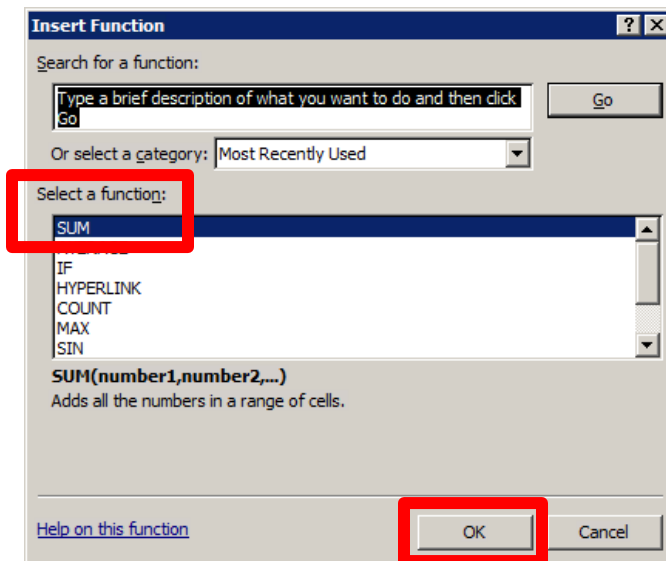
This is your total enrollment on the survey date.

NEXT, TOTAL THE HAVE CARD COLUMN.

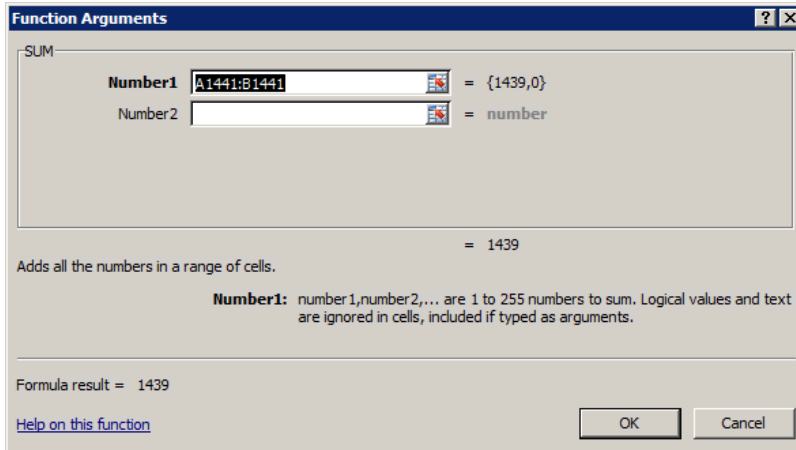
1. Click the cell after the last student in the **HAVE CARD** column on your report. This should be column C on your report.
2. Insert the **SUM** function. This can be done multiple ways. One way is to click the **Insert Function** icon in cell C1441 as shown in the screen shot below:



3. Make sure the **SUM** function is selected from the list.

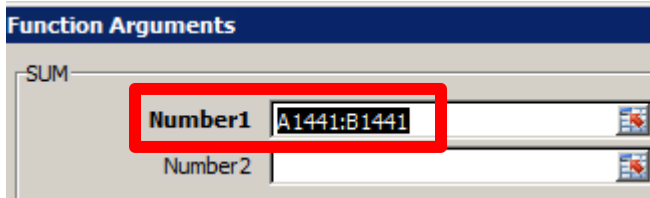


4. Click **OK**. A new window will appear. See the screen shot on the next page.

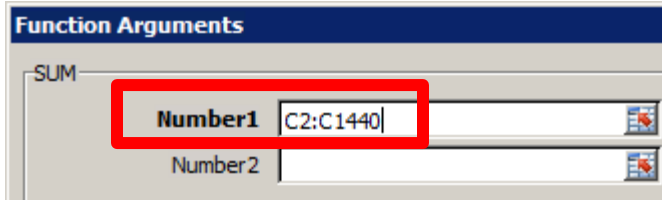


- In the **Number 1** field, change the existing numbers to C2 (the first cell you want totaled), enter a colon symbol, then the last cell you want totaled, in this example it is C1440. See the *Before Change* and *After Change* screen shots below. Your first cell number will be C2. Your last cell number will be different. It will be the cell number of the last student on your report.

BEFORE CHANGE



AFTER CHANGE



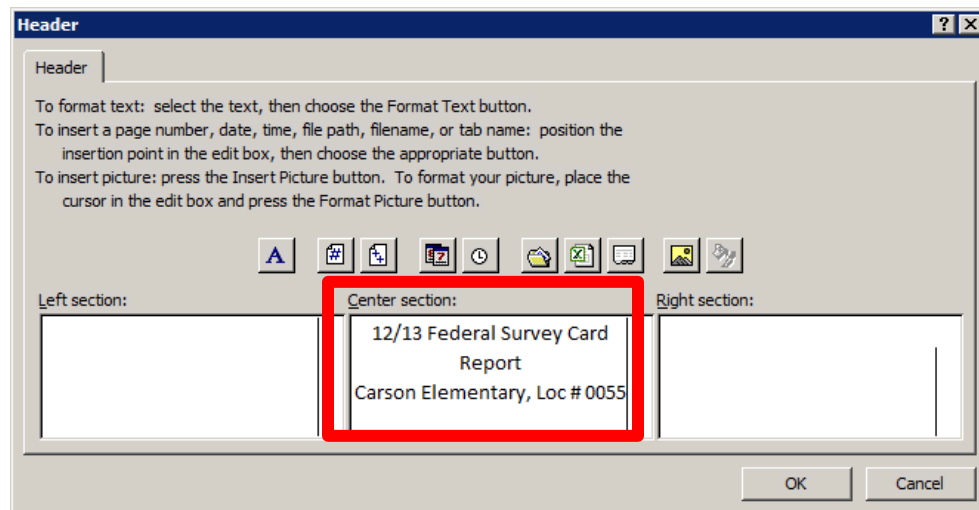
- Click OK.




This number will eventually show the total number of students who have turned in their cards. Right now it should show zero.

NOTE: You can sort the list by teacher, classroom number, or however best suits your needs. It is probably best to keep your list in classroom or teacher order until the end of your survey card collection, but you can resort it to find students by ID number or some other way and then resort to classroom order. However, when submitting the report to the Impact Aid Office, it needs to be sorted by student Last Name.

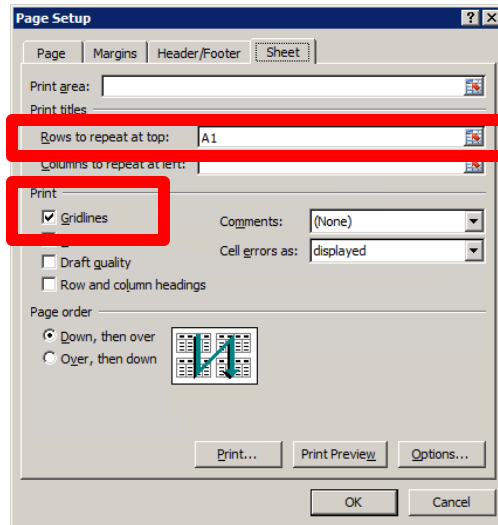
SET UP THE PAGES AND THE HEADER/FOOTER OF THE REPORT

1. Click the **Page Layout** tab > **Margins** > **Custom Margins...** (the words at the bottom, *not* the icon.)
 - a. On the **Page** tab, click the **Landscape** radio button.
 - b. On the **Margins** tab, set **Left** and **Right** to **.25**.
Top to **1**
Bottom to **.5**
Header to **.5**
Footer to **.25**
 - c. On the **Header/Footer** tab, click **Custom Header**
 - d. In the **Center** section, enter the following: **12/13 Federal Survey Card Report**. Press the **Enter** key on your keyboard, and then enter your School name and your location #.
 For example:



- f. Click **OK**. (This window closes and returns to the **Header/Footer** tab on the **Page Setup** dialog box.)
- g. Click **Custom Footer** (the cursor should be in the **Left** section)
- h. Click the **Insert File Path** icon .
 (&[Path]&[File] appears. In the printed document, this will show the file path and name.)
- i. Click in the **Right** section.
- j. Click the **#** icon , type the word **of**, press the space bar, and then click the **++** icon .
 (This will put page numbers (e.g., **1 of 16**) on your report.)
- k. Click **OK**.
- e. Click the **Sheet** tab:
- f. Check **Gridlines** to include gridlines in the spreadsheet.

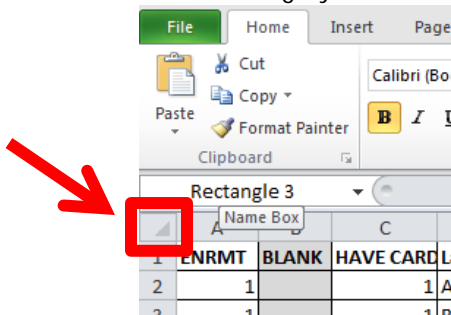
- g. In **Rows to Repeat at Top**, enter **A1**. (This will put your column headers on all pages.)
Your window should look like this:



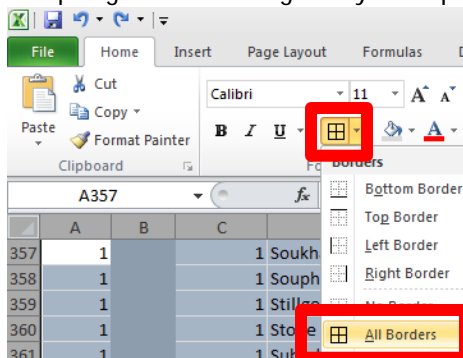
- h. Click OK when finished.

MAKE SURE ALL BORDERS IS SELECTED

1. Select your entire report by clicking the arrow to the left of the A cell. The entire Excel report should turn gray.



2. Click on the Borders icon and select **All Borders** from the menu. See screen shot below. This will put gridlines throughout your report including the **BLANK** column.



3. Close the file until you need to use it when students turn in cards. See the next set of instructions on how to use the report.

TEACHERS TURN IN CARDS TO THE OFFICE

1. As cards are turned in by your teachers, enter the numeral **1** in the **HAVE CARD** column for each student for whom a completed card is collected. If you have duplicate cards for a student, staple these together and count as one.
2. Once all cards are entered, you must sort your list alphabetically by student for your entire school.
3. Total *all* of the 1s in the **HAVE CARD** column.
To total the column, click in the field in the **HAVE CARD** column after your last student and insert the SUM function. See page 7 of this Job Aid for details.
4. Your final report *must* include the following columns:
 - a. ENRMT
 - b. BLANK
 - c. HAVE CARD
 - d. LAST NAME
 - e. FIRST NAM
 - f. HOMEADDR1
 - g. HOMEADDR2
 - h. BIRTHDATE
 - i. STUDENT ID
 - j. GRADE
 - i. Click **View** and select **Page Break Preview**.
 - ii. Move the blue lines to include the first 10 columns (A through J), ENRMT through Grade.
 - iii. Hide or Remove the **Teacher, Room #, Period, Course Code** and **Course Description** columns when actually submitting the report. (This will also reduce the number of pages of your report)
5. At the end of the collection, you must alphabetize all of your cards in complete alphabetical order. (In previous years, it was acceptable if the cards were alphabetized in rough alphabetical order, but they now *must* be alphabetized completely.)
6. Count all of your cards.
7. Your total on your list should match the number of cards collected.
If it doesn't, go through the cards, comparing them to the list until you are balanced to your list. Note name differences on the cards and highlight, putting in order of your alphabetical list. For example, if "David Jones" on card and "David Smith" on list, write "David Smith on list" at top and highlight. You can file it by Smith for comparison purposes to balance your cards to your list.
8. Type your name, phone number and e-mail address at the bottom of the report.
9. Print one copy of the list.

10. Circle the total number of cards on your report.
11. Sign and date the report. See screen shot below:

1437	1		1	Portillo	Anthony	9340 44TH ST	# C	07/09/1997	508008	
1438	1		1	Reuwer	Brayden	24991 CTE PLY MERIDA		11/27/1997	506569	
1439	1		1	San Martin	Jasmine	5519 ROANOKE ST		12/07/1997	502552	
1440	1			Tran	Leann	0191 36TH ST	# 1	05/02/1990	508771	
1441	1439			1427						
1442				Staff member responsible for survey: Jane Doe, Attendance Clerk				X Jane Doe		
1443				E-mail: jdoe11@sandi.net						
1444				Phone #: 619-555-9090						

12. Submit the original and keep a copy with the site employee information, signature and circled total on file at the site until the end of the school year. Also keep the electronic file until the end of the school year. Click the link below to view a sample report: http://old.sandi.net/zangle/readandlearn/jobaids/enrollment/FedSurveyCards1213_0003.pdf
13. When submitting the report and the actual survey cards, bring them to the **Impact Aid Office, Room 3244** at the Education Center.
14. Please contact that office with any Federal Survey Card questions. See the next page for instructions on **Running Labels for Federal Survey Cards**.
15. If you encounter Zangle-related problems, please contact your school's Zangle Power User or the IT Help Desk at 619-209-HELP (4357).

Running Labels for Federal Survey Cards

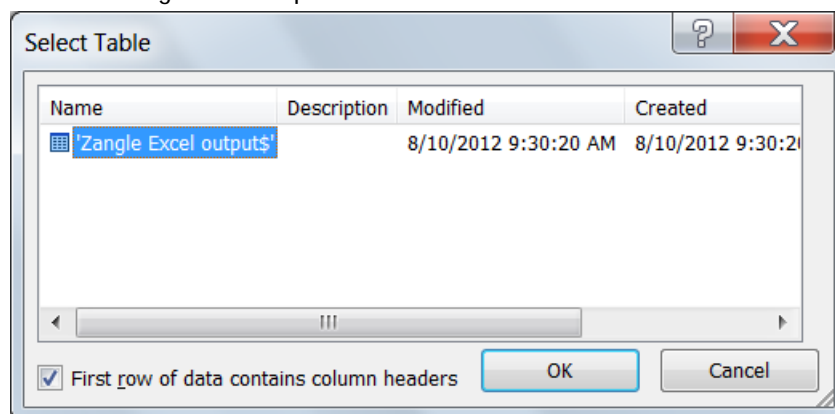
Labels must be attached to the survey cards before they are sent in to the Impact Aid Office. You must run the labels from your **Zangle Federal Survey Report**. Go ahead and run the labels when you prepare for the survey, and set them aside. You may wait until cards are completed to attach the labels since you may not know what language card each child needs. Please affix the label in the blank upper right area of the survey cards without covering any of the print.

These labels assist the central office to identify the students since some handwriting is unreadable and we are dealing with a high volume of cards. Also, the name written on the cards is not always the registered name, which makes it hard to find in the student information system.

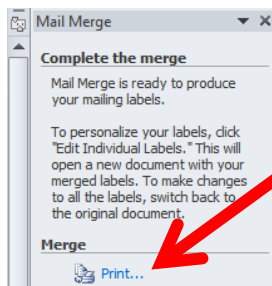
COMPLETING THE MAIL MERGE IN WORD:

1. Launch Microsoft Word.
2. Click the Mailings tab
3. Click **Start Mail Merge > Select Step by Step Mail Merge Wizard ...**
The Mail Merge task pane opens on the right side of the document:
4. Under **Select document type**, click the **Labels** radio button
5. Under **Step 1 of 6** at the bottom of the page, click **Next: Starting document**.
6. Under **Change document layout**, click **Label options** and select the types of labels you are going to print. (Typically **Avery 5167**, but the type of labels you have could be different.)
7. Click **OK**.
8. Under **Step 2 of 6**, click **Next: Select recipients**.
9. Under **Select recipients**, confirm that the **Use an existing list** radio button is selected, and under **Use an existing list**, click **Browse....**
10. When the browse window opens, navigate to your desktop, and select the Excel Spreadsheet that you saved earlier, "**FedSurveyCardsXX_cost center of your site.xls**"
11. Click **OK**

The following window opens:



12. Confirm that **First row of data contains column headers** is checked.
13. Click **OK**.
The **Mail Merge Recipients** window opens:
14. Click **OK**.
15. You should now see the label sheet formatted with the words **Next Record** appearing in each label.
16. At the bottom right, under Step 3 of 6, click **Next: Arrange your labels**.
17. Under **Arrange your labels**, click **More items ...**.
The **Insert Merge Field** window opens. The fields listed match the fields found in your Excel spreadsheet.
18. **Insert the desired fields** from the list.
You **must** include **Last Name**, **First Name**, and **Student Ident**.
(You could also add **Teacher Name** or **Classroom Number** if you will be distributing cards by teacher or classroom.)
19. Close the **Insert Merge Field** window.
20. Edit the label information:
You can add spaces (or commas and spaces) between **each field**, or hit the **Enter** key on your keyboard to add a new line after any field.
21. Select **All** and change the **font size** to have the text better fit your label. (Most users choose 8 or 9 point).
22. Click the **Update all labels** button.
(This changes all the labels to match the first one you formatted.)
23. Under Step 4 of 6, click **Next: Preview your labels**.
24. Under Step 5 of 6, click **Next: Complete the merge**.
25. **IMPORTANT:** To print **all** labels, click **Print...** in the **Mail Merge** box on the right side of the screen.



(If you were to choose **Print** from the **File** menu, **only** the first page of labels would print.)