

PSC Solution: TIP0040

Date: 10/14/2010

Application: ESS

School Year: N/A

File Specifications: N/A

Solution Type: Technical Tip

Title: Manipulating ED Facts.csv and .tab files in Excel

Issue Description:

Microsoft Excel can be a useful tool for isolating problems and checking data in ED Facts .tab and .csv files. The following tips may be useful in editing or checking these files without unintended changes to your data.

#### Opening Files in Excel

In order to open a .csv or .tab file in Excel you can right click the file, select the "open with" option, and select Excel. If it is the first time you are opening a particular type of file you may have to select "choose program..." and select Excel before it will regularly appear in the "open with" menu.

#### Sorting Data

Excel has functions that allow you to select how you would like your data sorted. You can select different columns and values to sort by using the "sort" or "filter" functions under the Data menu. In Excel 2007, this option is located at the far right of the home menu bar as well.

These functions are useful when searching for a specific educational unit's data, checking that subtotals are correct and ensuring that the disaggregation of your data has been correctly reported.

When sorting or filtering data it is important to either remove or exclude the header row of your file as the header has different value sets for each column and could cause problems for your data if it were to be filtered. A good way to do this may be to cut the header row and paste it into a different worksheet while manipulating data, and then insert it back into the main worksheet once you have completed the edits to your data.

#### Leading Zeros are Removed by Excel

When opening .csv and .tab files in Excel, the leading zeros will be dropped from any fields that begin with one or more zeros. For example, the state agency code will be changed from "01" to "1". Often state codes, NCES ID and State ID numbers will be affected by this.

To add the leading zeros back into those fields, you must change the format of the affected cells. Highlight the column that has been affected, right click and select "format cells". From the

category list, select “custom”, in the “Type” field type in the number of zeros that corresponds to the number of digits that should be in that column. For example State Agency and State FIPS code both have two digits, so you would type two zeros.

The formatting of the cells will remain while you have the file open, but if you close the file (after saving in .csv or .tab format) and then open it again, you will have to reformat the cells again to add the zeros back into those columns.

To avoid this problem altogether, use Notepad or another text editing program instead of Excel.

#### Saving Files as .csv and .tab Format in Excel

Once you have added the leading zeros back into your file and completed any edits that you wish to make, you will need to save the file. Excel automatically defaults to save the file in an Excel format, so select “save as” rather than “save” to ensure that the file is saved correctly.

From the “save as” window you need to ensure that either “Text (Tab delimited)” or CSV (Comma delimited) is selected for the “save as type” depending on your preference. You may receive a warning message that not all Excel functionality is retained in these formats. Note that you do not need to type in the .tab or.csv extension in your file name if the “save as type” is selected as above.