PSC-ED-FSA-TISD

Moderator: Angie Beatty
April 25, 2012
2:00pm CT

Coordinator: Good afternoon, and thank you for standing by. All participants will be on listen-only throughout the duration of today's conference call. Today's call is being recorded. If anyone has any objections you may disconnect at this time. And now I'll turn the call over to your first speaker for today, (Miss Rosa White). Ma'am, you may begin.

(Rosa White): Thank you, Angie. Good afternoon, everyone, and thank you for participating in our last session of the delinquency and default management Webinar. My name is (Rosa White), and I will be moderating this afternoon's session. I am with FSA, the default prevention team, and our presenter, (Jim Yoder), will lead our last NSLDS session for the day, manipulating NSLDS reports.

We are pleased to offer you the two days of training related to the (unintelligible) for managing student loan delinquency and default, and many schools have provided feedback and requested for help with managing their delinquency and default aversion activities, so we decided to create these Webinars with a focus on building the framework for effective default prevention strategies.

Yesterday, we conducted a day of Webinars with session one, default prevention, everybody's business; session two, identifying risks and developing a plan; and we ended the day with session three, working with the federal loan servicers. If by chance you missed any of yesterday's sessions, it is our intention and our plan that all of the session were recorded and will be recorded and made available at the conclusion of the Webinars today. We will notify you through our posted electronic announcement.

This afternoon, we are concluding with our last NSLDS session, manipulating NSLDS reports, which will show you how to use the NSLDS school portfolio and delinquency work-up layout to import the data, and see your desktop application software. So additional manipulation and analysis can be performed.

We know that this is a very busy time for schools, and we thank you for making the time to participate in our Webinars. Again, for your convenience, all of the sessions will be recorded and for you to review at a later time. Now just for the logistics of this Webinar, as Angie mentioned earlier, today's Webinar will be conducted in listen-only mode. If you have questions during the Webinar, you can click on the Q&A button on the top of the menu bar at the top of your screen.

Once you click on the Q&A session, a new window will open. Click in the top blank field to type in your question and then click on the word ask. Please remember to include the slide number with your questions. We have a question team that will address your questions and answer privately during the session. If additional research is needed, we will respond directly to you through email.

If you have any technical problems during the event, moving to the top right hand corner of the screen, you will see a blue circle with a question mark and then immediately to the left of that, a green square box. For technical problems, please click on the down arrow next to that green square box, and change the color to red, and we will open the chat window with you to address the problem. Remember, this red box is for technical questions or problems only.

You may download a copy of the slides by clicking on the hand-out icon near the top right corner. It's the three sheets of paper of icons, and - or by clicking the download slides on the bottom portion of the screen, and that is the printer icon. If there is need for closed captioning, please select more at the top menu bar and a window will appear with the words streaming across the screen. You can click and drag that box to the left or bottom of your screen.

Lastly, if you need to see a larger version of the slides, enlarge the screen by clicking on the monitor icon with four arrows pointing away from the corners, or you can select the F5 key on your keyboard. We do have a survey at the end of our Webinar event, and we'll hope you stay throughout the - until the end of the Webinar, and then participate in the survey, which will - you'll hear about as we move along.

Now, I'm going to turn the session over to (Jim) to begin this afternoon's Webinar. (Jim)?

(Jim Yoder): Thank you, (Rosa). Okay, so what'd I do with my next slide here? So when asked I guess to do it, to help (unintelligible), so I was kind of excited to help you guys in understanding how - what you can do with the information that gets taken out of NSLDS.

And so as you see here on the agenda, I kind of threw this together based on the information that was being shared with you in the previous two sessions, then also, you know, put it in here to help you out. But then I also took a twist on this from the standpoint of - from the approach of often when we get information, the questions from the NSLDS customer service center with various questions had come in through, you know, the help desk as you all would be calling in.

And I kind of took that and kind of tailored it - this presentation to that to help, kind of help with questions as we get them. So with that being said, I've got a slide here, just a quick slide, you know, talking about manipulating the NSLDS reports, you know, to help you assist with various school functions. And then what we'll do is we'll really start to dive into it then and talk more about the inner mechanics of requesting the reports and most specifically then that (Eric) had in his previous session, two sessions with the school portfolio report and then that delinquent bar report.

And we tailored this report then - or this session specifically for those two NSLDS reports, and then we'll kind of go - we'll step through those for the - from the aspect of requesting the reports, and then after you - after the information is requested, then it's just a matter of receiving it. Well, how do you receive it? How do you get this information? And that's kind of what we'll talk about then next, is retrieving that NSLDS data over the student aid Internet gateway, or the SAIG network, and we'll show you how you can do that by the - using the Ed-Connect PC software.

And then after you've received the data, then it's a matter of now you know, utilizing the NSLDS report record layouts and then taking that corresponding information that's sent to you, and then interpreting the data within it, and then taking it and then based on the record layout, taking that data and then importing into the PC application software to then, you know, do your ultimate analysis and data manipulation on.

Okay, you know, when you think about manipulation, you know, (unintelligible) - you know, being able to take that information and using, you know, the various software that's out there. Hopefully you'll be able to take it, and you know, analyze the patterns, you know, or find data trends within the data itself. And in this case, you know, from the previous sessions stay, you know, hopefully that's something that you could be able to take this information, you know, to help find, you know, those borrowers that are about ready to go into default.

And then with that information, then it's a matter of you know, using it, to then you know, base what your - use it for the basis for informed decisions. And then that's hopefully then something that you can take upon to then prove your - you know, your institution's current procedures and processes to help educate your students from defaulting. And then with that information, then, it's just a matter of, you know, how do you go about it? What do you use to manipulate the data?

Well, you know, more commonly there's various software out there, and the ones that are probably most readily available to you are the PC desktop software, which is the Microsoft Excel, which is of course, you know, a spreadsheet software, or the Microsoft Access, which is a relationship database software. So it's kind of more so from that standpoint, taking the information in and using what's shown on here in the presentation, is from the aspect of using the Microsoft Excel and how to take that information in.

So you'll see that as we get into it. Now, we want to go ahead and (unintelligible) request the information. As (Eric) mentioned in his other sessions, you know, it's more about, you know, the content of the information itself, whereas now it's just mainly going through the formality and the mechanics of requesting the reports. Well, where do you go to do that?

Well, the information you need to go into is you would - you'd log onto the NSLDS professional access Web site, and you would then get yourself over to that reports tab, and in that section there's like the quality ad hoc reports, where you can request this information on demand. And so you'd navigate over to the "8 reports" tab. Then with that, it's also important to note that as who you are - it's important to know, you know, how is it that you're logged on.

And that's what you see here on this print in the screenshot display example here, is that, it'll show you who you're logged on under - who you're logged on as, and where you're from, and then a couple other key elements that are also displayed on this, and it's very important information that's displayed for you to help you out, and it displays kind of who you are. And what we wanted - when NSLDS system went behind the AIMS, which is the access and identity management system, or AIMS, where then you're required to use an FSA user ID to log in.

So we took advantage of this opportunity to then display information about you when you're logged into NSLDS. So what you're seeing then is this information that's very important, is that some of the things that you'll see is who you're logged on, (unintelligible), FSA ID, and then your name as the person that's associated with that FSA ID of course, and then from what school organization you're with.

But then the other piece that's very important with this whole reporting - the request and report aspect, and then the report tab, is this TG number that's highlighted in the red box, and that's the TG number that's associated with the online user ID, the FSA ID of the organization you're with. Keep in mind that you know, an organization - people can have several different organizations that they're - that they have access to.

So with that, they may have just the one FSA user ID that has multiple relationships tied to that one FSA user ID, and of course those of you that have that type of an access, the majority have just one. It's a one-to-one relationship, but there might be somebody that may have multiple organizations, access to. When you very first log on to the NSLDS Web site, you'll see a pick list, and then it's at that point is where you pick which organization you're going to further then log into in NSLDS.

And if at that point then it displays this information you see at the top with what organization you're with, and then that TG number associated with that organization's contact. Okay? So that's very key, is knowing which TG number is associated with your organization you're doing business with at the time of making that report request.

And if you're not really sure, you know, there is - there are various other reports out there. One of them specifically is that your primary destination point administrator, it's that person who signs you up at your organization, they themselves have their own report that they can get to, to find details about all the users if you're still unsure as far as you know, what kind of information they have, or you know, details about you. Your PDPA can request that information, have that readily available.

So that being said, back to the slide. Yes, the two that was - there's about - under the report tab, there's a report list, and there's roughly about 20 or so that are available for the school users, and the two that we're going to be talking about in this presentation is slide - is report #1, and #16, the delinquent borrow report as well as the school portfolio report.

Okay. All right, so then by way of an example, and again, going through the mechanics of requesting a report, I’m talking about this delinquent borrow, which is the DELEQ01. Some of the key points - I know in the previous sessions we’ve been having to monitor the questions as they were coming in. We had a lot of people asking about what’s the difference between extract and report format, you know, things like that. And this is pretty much the NSLDS standard is where you’ll see this.

Those that do have the different formats and how you can request them, either extract or report is that you’ll see that through that first drop down next to the report ID. So in this case, what’s DELEQ01 to the right of that is a type, and you see it for extract, okay? Or if you want it in that pre-formatted report which has labels and the data next to it, you could get it by way of reports, by selecting that drop-down as the option.

But from the standpoint of being able to manipulate your data, you wouldn’t want to do the reports. You’d want to do it by way of extract, and then it’s that extract, and that provides it for you on a record-by-record row on the output. You know, we take in information, as we’ll see a little bit later on. How you utilize that then against the record layout, defining what values are represented there according to the layout - so it’s the extract that you want.

And then the other piece that’s really - very important to this particular type of report is that extract type. And it’s that - the second to the last drop-down option labeled extract type of course, and the two different types that you can select. So if you selected the standard, which is the fixed width - okay. And if you select that - this report as the standard type, then that will come - that’s a fixed width, and that will come to you in the message class as you see here, DELEQ SSOP, versus if you were to select the other option under this. It would be COMIDA limited as it's labeled there, and then you would get that in its corresponding message class.

The message classes are pretty key, and it helps you to identify what kind of data is produced and sent to you, and we tried to help you out by putting in the appropriate message class so you don't have to guess. This will help with that. Okay, oh, and then the other things I wanted to kind of talk about too, is this is the ad hoc report for doing the delinquent borrower report, okay? So this then is - this would be as the person who's logged on making this request under this report tab, it would be sent to the corresponding TG number, right? Versus - some of you may already have it set up to have an automatic push of this file, and you can do that.

And that's established under the organization tab, under that school profile link, and under there, and several schools are taking advantage of this. In the FSA conference last year, I think that they had the sessions specifically gearing towards this. So a lot of you are taking advantage of it, but under that section of the (unintelligible) under the school profile link, you can also designate a scheduled report for the delinquent borrower, and you can define how often you want it and what kind of format there as well, okay?

The only difference there on that location where you can designate it is that you can specifically tell which TG number you want to automatically schedule to be pushed to. So in that case, you could always set it up to be a different TG number, and then what's associated with your online user ID if you were to request that TIN report under the report tab. So I wanted to make that difference there. Okay.

So that's the delinquent borrower report. You've - you enter your parameters, right? And then the other example of this would be the school - the question the school portfolio report, where on this one, then what you're seeing here is that the - you don't have a selection opportunity to receive this file results to you. You only get it in the extract, okay? And that's in the fixed width format, okay?

And with it being the default of an extract where the raw data comes to you in a flat file, right, in the fixed width format, then it's being sent to you to the designated TG number, the person requesting this report, and to - and the sent over to the - I said, you know what? There's a corresponding message class that you see here. Okay?

Okay, so then after you enter in your corresponding parameters on the parameters page for the reports, then you would be - then the next thing you would be receiving after you click that submit button was that you would get a confirmation saying, hey, do you really want to, you know, submit this and confirm the submittal of the report? And once you have then selected confirm and clicked that button, then you get the confirmation, that display saying hit - that the report was successfully submitted.

And that's pretty standard throughout all the NSLDS reports. Okay. All right, so then you've submitted the report. You've got confirmation that it went in. You can always see the status of the requested report that you put in by navigating to this report log. This report log you can get to directly from the parameter page of the specific report by clicking on that blue arrow that takes you to the report log, or that main page we saw on slide #5 where that report list is, where it lists all 20 reports where if you were to go there, you can click directly on that log page icon and it will take you directly to this page as well.

Okay, so this page is very - oh, another very important piece and information that's retained here is that, you know, captures - you know the report parameter details that you use when submitting your request. So you'll see this information here as far as who requested it, how you're going to get it, and the various parameters used, and then more importantly that record type, you know, how you're going to get it, either, you know, extract or report.

But the things I wanted to point out to you is this - that's pretty key with this is that end date and time. Now the end date and time, as soon as you immediately send one through this mechanism here, and where to navigate, it would show up as you know, not NA or not applicable. And that's - you're to take that as the request has not been processed by NSLDS yet, okay?

So keep that in mind, versus once you - once the report has been processed, then you'll see then the end date and time populated with the actual date and time it was actually processed. Okay? Now the good thing that - you want to keep in mind that's different is that just because something is processed and you know it's processed because it has an end date time here in this field, and it's highlighted in the red box, doesn't necessarily mean that it's ready and available for you in the corresponding SAIG mailbox of that person who requested it, because there is different NSLDS - you know, it does things in a sequential manner.

It takes information that queued up through the request. It processes those in its scheduled time, and then once they're ready, then it goes, and then it - we have a series of jobs then that execute and it pushes the information out over the SAIG to the appropriate mailbox, and those are two different times. But in general - but keep that in mind.

So in general, you always want to look at this to see where things are, if it's actually been processed or not, and then we'll take a look then, later on in the next couple slides at how you can see if it's ready for you or not. But in general, if you request a report one day, it should be ready for you then the next following day in the corresponding SAIG mailbox, okay?

All right, so you've requested the information on the NSLDS Web site with your online user ID, the corresponding organization that you log on with, and now it's been processed. Well, the next step is to get the information. Well, what you can use to receive the information is using the Ed-Connect software, which is a federal student aid PC-based software which is designed and used then to send and receive data over that - over the SAIG network, okay?

And it's a PC-based software. It's secure for transmitting any you know, PII data, and within files is message class names, okay? And that's why it's important to know which file - which report that you're requesting, so what method of class it will be produced and sent to you over the SAIG, okay? And then the other thing that's kind of very important with this piece is that the Ed-Connect software allows you to have various levels of access within your organization.

You can either, you know, install and use this as a standalone type of inner (unintelligible) on your own computer so that way if you're the only one, you know, sending this information out for your own TG number, you can - you're flexible enough that you can install it locally and just use it on your own, or if you wanted to put it on a network to allow for multiple users to access, you can most certainly do that as well and have everybody using the one common database then to then capture all the information as it's being sent and received over the SAIG network.

What works best for you and your organization, you may want to work both with your IT department or some person that - your techy folks to see how that's the approach that you want to take on that, as well as consult probably with the CPS SAIG technical support, to - if they have any type of you know, linked in questions of how to do this or how to do that kind of a thing, okay?

And then also - and then either way that you choose to do that, then yes, you will definitely want to create an Ed-Connect user associated with your SAIG TG number, okay? So likewise we'll receive that here, if you have a TG number, for the one organization, then you'll want to make sure that you have an account within the Ed-Connect software. Then that links to then that TG number so you can receive the information over the SAIG through that mailbox, okay?

And also too, the information is shared here that I used to capture this information was using the Ed-Connect at this 7-point whatever the latest version of the 7-point version was, and I think there is Ed-Connect version 8.1 or 8 series that you'll have to eventually upgrade and start to use so you can log on with your FSA ID. The mechanics of that are no different using one versus the other. And you'll want to consult with the Ed-Connect user's guide that's available out on the FSA download to help you know, answer any questions, you know, specific about using the software or getting it installed.

Okay, all right. So you've got the software installed, either locally or network, however you choose. It's a matter of then starting out to use it. Well then you'd want to log in. What you're going to do first is you're going to just check the status of your - you know, of your files in the SAIG mailbox, and you can do that by using this mailbox query tool that's within the software. And like with anything, there's various different ways. Either you can do - you can use it to do, you know, whatever you need to do.

So by navigating to the mailbox query, you can usually do that by selecting what you see highlighted there in the red box to the right, which is the icon. Selecting the icon takes you to the mailbox query, or if you were - if you're a drop-down menu kind of guy, or person, you can then drill down to that section by going to (unintelligible), drop down and going to new, and then selecting from the pick list there in mailbox query. Either way it takes you to the same location.

Okay, all right, so what we're doing - so when you want - so once you get to these mailbox queries, then it will basically show you then information from your last transmission, and this is basically information (unintelligible) then to be received. So if you wanted to refresh your list, you most certainly want to refresh it, you can refresh your list then - to then see if that file that we saw on the NSLDS Web site, that having the end date is ready to be received yet.

And you can do that then by refreshing the mailbox query list, by again doing one of the two options there is, the icon, clicking it, or going to the drop-down menu of the transmit, transmit now. Okay, so then the other - like with all good software, it gives you a status of what it's doing, when it's doing things like that, if it's successful or not. You'll get that information there by looking at the statuses of it when it's complete.

Then in that mailbox query, you can see then the information of all that I put in those files are ready to be received. They're out there readily available for you to go get. And the reason why I like to do this option is that you know, especially if it's something set up where, if there are multiple files being sent to the same TG number, then you can pick and choose only those that you truly want to get, okay?

And that’s a nice feature about this, is it shows you, hey, what’s out there, and also if it’s out there ready to get, you can then just simply click that real next move to TQ checkbox and select those individually. And now if you do that, then just click the save icon, what that will do is it will move that - those selected rows over to the transmission queue, or the TQ, okay?

Once the - and then it should now be - again, you can either go to the transmission queue again, either by way of the icon selecting on the top there, or going to file, new, and then selecting the transmission queue option as you see there highlighted in red, selecting okay. Then it takes you then to the transmission queue. And then at that transmission queue, it tells you that simply, okay, the next time you transmit, this is the type of activity that’s going to take place.

So we’re basically telling it after we look at what’s available in the transition - in the mailbox query, we only told the software, we want only three files to go get, even though there are more files available to receive. We only wanted these three that you see designated here, okay? And these correspond back to them. Then of course - then how we request that information on NSLDS Web site?

For example, we show the - we’ve got the delinquent borrower report. We requested it one way as a format type of being kind of limited, and we turn around and request it again as being fixed width or standard. And then the other one is this ad hoc request that’s the result of doing that one that we did for this school portfolio report. And that gets sent to you in that more generically named ad hoc extract message class. Okay?

Then, now that you’ve got the information in, it’s in the transmission queue, which again at this point is going to go ahead and start the transmission again by different options, either the icon itself as you see highlighted there, or going to the transmission and hit transmit now. Okay? And then that will proceed then, and it will give you the status of what's going on, if it wasn't successful. You can enter a message or refer you to the activity log to see if it tells about it. And so at the end it gives you an overall status, successful, and then it takes it up and tells us what's identified here in that red box is how many files were actually received, okay?

Now this information I was showing you in these past few slides - and of course you know that's a step-by-step approach. You most certainly don't have to do those in that order. You can - if you wanted to, you can just go ahead and do a simple transmit now and do a receive request to receive everything if you wanted to. That will give you the same result, is that you will go ahead and receive all those files that are readily available to be received.

I guess I could do this, because it kind of lets you be in a little bit more control as to which ones you want to actually pick and choose to actually go get, okay? All right. On the next slide, then, this is activity log. Information, and this is another key; this is probably one of the most important pieces of this offering. It lets you know information about the results of your transmission, okay?

And likewise you can get to there by way of an icon, like go to activity log, and selecting it. And it tells you the information, all the steps of what happened. It shows - it's color coordinated, you know, the requests and if information was actually received you see it in a different color. And now when you see it's been received, it gives you more details about it, the actual file name, whether it was received, and what it was saved as, okay?

But if you wanted to see the information within the file, then all you have to do is double-click that file name on that designated IV activity as being received. Double-click that. Double-click that relevant file name. So what that will do for you, as we go to the next slide, what that will do for you is that it allows you to view the content of the information within that file, and where that really becomes more important than others is that a lot of these NSLDS results of the various reports are sent (unintelligible) extract.

They'll be sent to you in this generically named message class that you see here in this title bar, the AHSLDE OP. So to see if it's actually the report that you wanted, then by double-clicking it to open it, you can actually see the contents from within it, and it's where - this very first row that helps you to interpret what the results are from this file or how it was generated. It tells you in that first row, that header record, and that's that report, portfolio report, with see report ID next to it. Okay?

And then as well is underneath it the detailed information about it. Now let's you see - so you've received, you've requested the file. You've seen if it's available. You've gone on and requested and actually received the files. You've viewed it. Sure enough, you realize that this is the file that you truly wanted to get as a result of what you made the request on the Web site. Then you're ready to go, and take this to the next step, and that's importing into either Microsoft access or through - in the Excel or Access, okay?

So this first bullet point in the screenshot there is very key in telling you what kind of file it was, you know, and then close - you know, where did it put it? Okay, those are key pieces of information that you want to know where you need to drill down to, to then open it up to then, you know, start the import process into the PC-based software itself.

So then the next step is, all right, you've gotten the information off the network. You verified that it truly is what you're looking for. Now what you want to do is you want to use - you want to then utilize the NSLDS (unintelligible). And all the documentation for record layouts for the various reports of NSLDS, they're all out there and retained in the NSLDS reference materials, like the ISAP Web site, and that is hyper-linked there in that bullet point there for you, but it's all out there like that.

Not only will you find the record layouts on that ISAP, but you'll also find the newsletters too. Specifically then the ones that you'll be needing for this exercise here is the (unintelligible) borrower report and extracts right for the eligible schools, as well as that portfolio, and both those - we had some updates to the - enhancements to the system that require us to update them, the record layouts, and they were post - posted them last November, okay?

So you'll see those out there in this location and the ISAP Web site, and as you were to - if you were to actually open them up, you'd see the title of it as well as in the date, and those are the November 12th. They were document date of November 20th, 2011, and they were actually there and ready to be received on ISAP on the (unintelligible).

All right, so this slide here, I kind of wanted to - I wanted to take this and kind of break it down for you, because I know when I very first started on the help desk and trying to understand the record layout, I was thoroughly confused, let me tell you. And it was hard to understand making those connections of what truly is an extract file. And hopefully this will maybe help that connect that piece together for you.

But this is then of course taking this portfolio, the school portfolio record layout, and you can use this very similar to (unintelligible) extrapolating it out to the delinquent borrower report as well. I just chose this one to then show the examples. But what you're seeing here is in (Eric)'s session, gave us the entire record layout, went through it field by field.

I'm only taking the first six fields or so of this record layout so you can kind of help get an understanding of how things work, okay? So we're looking at the first few fields or so, like the first few data elements and the first two columns. We had several questions in the last session, you know, what is that?

Basically that first column is that position from. That's the starting position of that data element, okay, that's that position starting in Position 1 and ending in Position 1 and it's basically a length of one and you see that column on the far right as the link, how big is this field? It's only one character. Start where it starts and ends in Position 1.

And after you're seeing that on those first two columns is that basically that from is that the beginning position, the second column is the ending position, where it ends, okay, and then you'll see that data element.

What data element is this? What is that in that position and you've got that listed here, okay, and then you've got a description and that further defines, you know, what that data element represents.

And then that next column over you've got the field format and that's nothing more they kind of help you, kind of gives some guidance as far as, you know, how that information - how that data - should be represented once you would actually look at it, okay?

And most of these are in character format, interesting character format and it'll have a lead zero. If it's numbers or if it's just like truly a name where it's all letters and stuff, then that's truly a character field format as well.

And then where you see then on the other one that for example the borrower day, that's a date field. For the most part you'll find almost the majority of all the NSLDS reports when we send a date (died) to you. You'll see it listed in that format there where it's the CCYY and then DD. It comes to you in that format where there are no dashes but it's a date.

So taking that information as you see listed in the from and to for each of the data elements listed there for this 550-length record layout, we're now taking then as you see in the lower half of this screen I just took the first 80 bytes if you will of the flat file or this fixed-width file and you're seeing it represented there.

I went ahead and did nothing more than put a ruler if you will on there that starts from the first position all the way to the eight. That's to designate and it's broken-out in increments of 10 characters or 10 bytes or 10 positions, right?

So you see that first set of value where it starts out where you see that first one on that rule, that's the first 10 bytes whereas when you see a two starting kind of in that section of the borrower date of birth, that two there represents that's saying, okay, in position by 20, so on and so forth up to Position 80 which is that far right character on the right.

So it's just kind of rule to kind of help seeing how you can take the information on the extract and then figuring out what these data elements are so to help visually kind of then further describe this is it kind of broke it out for you as well through, you know, kind of color-coding and circling and that first position is it tells us in the record layout above, position from and to, Position 1, that's the record type.

And in there the record type is that one and that represents the detail so this is that actual kid's - the student's - information, the details about the borrower, okay, and you'll see that and it's represented through that value of a one in that first position.

That's the record type followed then by the school ID and that starts in Position 2 and ends in Position 9 so it's as we see over to the far right of eight it's a length of eight and that's the school ID.

And then followed then after that and starting in Position 10 through Position 18 you'll then see that being represented as the borrower's SSN and then so on and so forth as you follow this left to right, then 19 through 26 will be the borrower's date of birth and there that is in that format as described in the record layout of the CCYYMMDD, no dashes.

Then after that will be the borrower's last name and that's a 35-character length field, starting Position 26 and ending in 61 then you'll see then you saw hopefully this helps then to kind of give you an understanding of how these fixed width record layouts is represented and how you can interpret it by using the record layout and looking at the actual data rows themselves, okay?

All right, let's go to the next slide. Okay, so you've got the data. Now it's a matter of, you know, using a record layout. There's some tips I wanted to kind of call out for you before you bring it into its cell.

There's that it works best if you open or you launch Excel first within MP workbook, then from there you just go ahead and do a file open and then you can then drill your way down to that folder of where the file was placed when edConnect downloaded it.

So that's why it's very important to see by using that activity log where the file was sent to and how it was created and what name it was given so you'll need that here through this import process into Excel.

All right, so then you're going to do a file open. You're going to drill down to finance so then select it to then begin the import process and then Excel's pretty. It's got a nice feature built-in with it and it's the import wizard so that you can start to begin that process then as you cross-reference the NSLDS record layout.

Okay, with that said let's go ahead and start by showing you some of the example of how to kind of go through this process so within Excel you find go to file open and you'll see that through those screenshots there, file open and then when you do that after selecting it gives you a little open dialog box.

And where then this is the part when you want to then make sure that you're drilling down to that same location as noted in the edConnect activity log, okay? In this case for example I put all my files into IM data which I think is a good follow-up directory, sort of drilling down to that in the open dialog box but yet when we look at it, there's no files to be listed.

Well, we know there are but they're not displaying but even if they're not there, what you want to make sure you do is because you're using Microsoft Excel, it automatically assumes that you're going after Excel files.

And that's why then you see on this note off to the right is under the filename there's a little box there. It defaults to all Excel files and gives you the extension associated with those types of files.

Well, the file as we saw on the activity log was most certainly not ending in xls or xl or any of those that you see there so that's why it's not appearing on that box to the left so no problem. All you have to do is just change that default view and clicking on it and it gives you a list and just select all files.

After you do that, then you would then see all the files that are in that designated folder that you drilled down to. In this case then we're seeing here the files that we then received on that given day, okay?

So you can do one of two different ways. You can select it and then click open, that's one way or just double-click the filename so in our example here, we're going to go ahead and take then the AHSLDEOP which is that school portfolio fixed-width file and begin the import process that will tell a story.

Okay, so one of the first things it will do is it will launch into the detect import wizard and it's basically a three-step process where this Step 1 where you need to tell it, what kind of file is it that I want, okay?

Then I'm going to then continue with this import process. You have to tell it. It tries to figure it out. It may be right or wrong but it's a fixed width so you want to make sure that that radio button is in fact selected.

After selecting it, okay, then you'll want to - let me catch up here and we (print off) - then you want to click on the next button. Well, then that brings it into Step 2 of the three import wizard.

All right, so then this is where it ends. This is then kind of the important piece so taking that information from that file that you drilled down to to open up, definitely is a fixed width and now you're going to cross-reference the record layout.

Okay, the key field is what I've pulled out and listed here on the left and that's at Position 2, that's that basically the ending position, right, of that particular data element.

That's the key position that you're looking for to then build then and annotate each data element as you progress through this import wizard process, okay, so it's at Position 2, the ending, that's the piece that you want to pay attention to.

Okay, so then again I just did nothing more than to make this very similar in nature to what that slide with the example a couple of slides ago in breaking it out for you.

It's not going to display it for you as you go through this import wizard giving you those color-coordinated fields, I've put that in there just to help you understand where these breakdowns are of each particular field, okay, and the data elements.

Now if you then selected then by way of clicking the appropriate column for that data element ending field, then what you would want to do is click on that scroll button and that scrolls it to the right, okay?

We know this is a 550-byte field but what we're only seeing here on this screen here, the first one through 75 or so bytes, okay, well we need to see the rest of it to the right. You just click on that right arrow to scroll to the right, okay?

All right, so in so doing that then, then you see here then with each then segment as you're viewing in that scrollable field you're seeing that here from top to bottom and then advancing as I proceed from position, you know, 100 or just under 100 through over 160.

And then I'm designating with each as I'm cross-referencing the record layout that Position 2 the ending field, I'm clicking on that column, advancing or scrolling to the next set of fields to the right and then designated each column for those and then continuing on.

Okay. With ending with that, we're going all the way through each field position or data element left to right where then we see here at the very end where we see then that position of 550 and we know we're at the end because that's what the record layout says, it's 550 characters in length.

So then in the I wanted to point this out to you too in this tips I put it in there in blue is that either a reminder to you of what you can do to either add a column or take one away. You can double-click on it and it deletes it or click or move it around, drag and drop, you can do that here and it'll tell you how to do that.

And also too sometimes it meaning the import wizard it tries to help you out by automatically thinking oh, this is the start of the field. I'm going to go ahead and put this line - this vertical arrow line here - because it must be a field.

Well, it made sure to not be. No problem because you can always click and move and drag, you know, where it needs to be or double-click on it to delete and then click where you really truly need for it to be, okay?

Continuing with that, we're going all the way through each field position or data element left to right whereas then we see here at the very end where we see then that position of 550 and we know we're at the end because that's what the record layout says, it's 550 characters in length.

So and then in the I wanted to point this out to you too in this tips I put it in there in blue is that either a reminder to you of what you can do to either add a column or take one away, you can double-click on it and it deletes it or click or move it around, drag and drop, you can do that there and it tells you how to do that.

And also too sometimes it meaning the import wizard it tries to help you out by automatically thinking oh, this is the start of a field. I'm going to go ahead and put this line - this vertical arrow line here - because it must be a field.

Well, it may truly not be. No problem because you can always click and move and drag, you know, where it needs to be or double-click on it to delete and then click where you really truly need for it to be, okay?

All right. All right so then what you want to do then is after you then selected all of your - you've defined all your data elements and the field positions that they fall within - then at that last screen, that's only when you want to click next and then that then completes then the Step 3 of 3, well, it then will take you then to the third step of this import wizard, okay?

Where then this is the important piece where you wanted to then define the data format for each field. The typical field formats that are displayed on the record layouts you see here on this slide in this second bullet is character, numeric and date.

Where then typically this is a character field, you want to import that as the data format into Excel as a text data format versus if it's a number field, well then you can go ahead and leave the default that Excel uses for that field as general.

And then like what you see there for date, you want to use that as a text data format but the important piece that you want to remember is that if you use when designating a number.

If you're designating this column to import into Excel as a general data format, it will drop lead zeroes. Sometimes you need those lead zeroes to kind of help you out so like for instance if you had a school code that starts with 0-0, you know, 1-2-3-4-5, you'd most certainly want to keep that lead zero of that school code.

So you would not want to select as a general for that particular data element actually. You want to make sure that you do that as a text to retain those lead zeroes of that school code, okay? What you can do then is you don't have to select each individual row.

If you have a range of rows, you most certainly it's got a nice feature built-in with that where you can use that shift key so if you hold down the shift key, designate by scrolling through the right and you'll field a column at a time and selecting the range to select those within that range and then you can designate the data format itself and we'll show you that here in an example.

Okay, so Step 3 then is you want to tell it what data formats to use, take that date to import into Excel so and then that's that first - the one I'm seeing here in that first callout box on the right - is that you want to select the columns first and specify the data format type, okay?

So if you wanted to select all of these fields as text, most certainly you can do that. You just select the various first column on the far left and then scroll your way all the way over to the right using that scrollbar, hold the shift key and then click that last column in the Position 550 and then they'll all be highlighted such as you're seeing here in black.

Then you can just go ahead and say you know what? I want all of these that are highlighted to be this certain data format and we're just going to define them as text and then you'll see that thing change into that data preview as it then changes from general the default to now being text.

After that, after you've done defining each field, and if you - after you're done defining each field data format - then you're ready to click finished to complete the import process.

Okay. The field that, you know, routing is now ready where you can go ahead and define the column it's now in itself in its defined columns, okay, and so with this here then what you're seeing as in this screenshot here is it's taking this information and each column is now represented by, you know, the fields that you've defined through that import wizard.

Whereas in Column A we're seeing that record type being represented in Column A and then the other thing that I wanted to point out to you too is that through the fixed-width files if you get them that way and again this is another one of those NSLDS standards is that you'll get basically three files - three different record types - generally.

And that the first one is usually always be the header record as you see here labeled as zero record type and you've got all the detail records representing through the in Column A as Record Type 1, that's the detail where then that's followed and corresponds to the detail record layout that we were referencing and then we're inputting the detail records in.

Then you see Row Number 17 of the Excel there, that's the (traver) record, okay, and each one of those has their own record layouts. Okay. Once you've got it into Excel, then what you'll want to do is you'll want to save your file and, you know, give it a meaningful name and then make sure you do a save-as type there in giving it an Excel extension.

Otherwise it'll default to whatever value it was as it was created using edConnect so we're just going to say we've got the file. We now want to save it as an Excel workbook and it gives us the appropriate extension with whatever meaningful filename you type in that filename box.

Okay. Now then essentially the data is, you know, is ready to manipulate but to really help us be more meaningful as well, what you can do at that point in time is insert a brand new row, those of you who are Excel experts, you know how to use that software, you know, are very comfortable using it, inserting rows, things like that.

You can insert a row and it gives the column the meaningful name and just what you can do is cross-reference that and I showed you this record layout the data element and give it the same name here so you know what Column A represents.

Well, it’s defined as the record type and it’s working your way left to right. Essentially it’s now in Excel and you can go ahead and go to town with being able to work with the file. Okay, so that was the fixed width, right?

Well the other way that - and some of the, not all reports from within NSLDS - have the option to be sent to you in the comma-delimited format. It could be an unfortunate thing. It’s just something that’s really (pretty) new in the NSLDS world in being have this being now a relatively new format to be sent out.

So that’s why a lot of the older reports haven’t been upgraded if you will to not then have comma-delimited format but those that do have it such as the billing-borrower report as we saw on that report parameters page, you can do it one of two ways.

Either the fixed width or the comma-delimited and if you choose to get it in comma-delimited, the way that you deal with the information is no different than doing fixed width. You basically can use, you know, the same procedures as we walked through in this fixed width using the import wizard.

You just want to tell it that you want it to have it to be delimited and not fixed width and we’ll show you examples of this here shortly and then also along with that on that import wizard as it walks you through it on Step 2 of 3, you just to then need to tell it what kind of delimiters separate each data element, okay, and it’s standard comma and we’ll show you that too.

But also with as with the, you know, the fixed width, you had to go back through, we had to define the data format system. No different here using the comma-delimited output method and then you'd want to also then give it a filename with the Excel extension, okay?

And this is just nothing more than I wanted to show you this here on this screenshot this screenshot capture, this is what then would be an example of what a comma-delimited file would in fact look like and its corresponding message class as you see here is it's that delinquent borrower in the message class file.

Where it's nothing more than the information that you see here in that first column if you will but things aren't as lined-up as nice and neat as a fixed width, right, because there are some fields that may not be applicable to some record and so therefore, you know, the data will appear to be shifting, you know, all over the place, okay?

So that's one of the I guess downfalls of having a comma-delimited is things aren't going to be lined-up nice and pretty, you know, as you're looking at it from a column perspective, however, there are benefits to using it and you'll see in a second.

But you'll see then each field, each data element is separated by a comma, comma-separated or delimited, comma-delimited but it's basically just a comma-separated field.

Okay, so then like what we saw before, you want to open up Excel, drill down to the location where the file was received using edConnect. You're going to fill-out your file and then in that Step 1 of 3 of the import wizard, this is where I'm saying that you'll want to then make sure you tell it that it's a delimited file.

And you select that by way of the radio button and then you get and then Step 2 of 3 then this is where you tell it okay, how are these fields separate by? What's being used to separate each column and it's a comma.

So you then make sure that that's the only one selected, I click the (next at the bottom) and then after you do that, then it automatically finds then and then as you see here it defines each column accordingly and puts it in a nice column fashion.

Where then in Step 3 of 3 it's like what we had to do before. You then have to tell it which fields are to be what type of a data format and after you do that you can click finish. You don't have to go through - that's one of the benefits of a comma-delimited - is you don't have to go through field by field to demark using that Position 2 because there is no Position 2 ending.

It's all separated by a comma. You don't have to go through and manually select each field's position. If you test it automatically and you click finish, this is what you see here and it's automatically defined for you in the appropriate columns so it's a little bit easier to work with the comma-delimited file through the important process so it's kind of a nice little feature.

And that's where you then see the information as it's listed here row by row, each data, data record, okay, and then that's why those - I didn't really have an example here - by way of the slides but you'll see that documented in the delinquent borrower report that's available in IFAP.

You'll see the information - the record layout - all in one document. It has the fixed width with the header detail and then trailer information as fixed width, but then after that you'll also then see a section where it talks about how to interpret the comma-delimited file as well, okay, so it's over there and documented in that record layout.

Okay, so the data is ready to then - you're ready to manipulate - the data. Okay, so to recap are some considerations of this and bringing information to an Excel spreadsheet is that if you did in fact import all your columns into Excel by telling it the data formats to be text, you can always go back within Excel after the data is already there and then convert the columns accordingly if you wanted to then be in number format, okay?

You can always you do that after you've imported it into Excel and the other thing you want to do as I mentioned previously is you want to no matter how you do it - either fixed width or comma-delimited - give the columns, you know, useful names, you can base that then off the NSLDS record layout.

But then once it's in Excel, those of you who are very comfortable using Excel, then you can go ahead and manipulate this, you know, slice and dice and filter and sort and summarize, you know, all you want and that's one of the beauties about using the spreadsheet.

Okay, so then a couple of other reminders then about this is that so and you kind of talked about this already, the fixed-width files. Just keep in mind the first and last rows will be the header and trailer records and then those are differentiated by their record types.

So it's up to you on whether you want to look at that information, retain it and then import those accordingly to their record layouts of just use the detail records of the actual data itself, those being the Record Type 1 and importing them that way.

Some other things that you want to consider, you know, well I guess depending on which PC application you want to use is that there are some limitations to Excel.

But I think with the most recent version of Excel 2010 I think you're able to import a much more significant amount of data than you could in earlier versions so it's kind of limiting the information, calling out to approximation of the numbers row that you can import into Excel.

But then also too if you've gotten the information into Excel, (stages) in Excel file, what you can always do too is you can take that Excel file - that spreadsheet file - and you can always import that into MS Access because Access is one of those it's a nice database for relationship database was definitely much more robust when it comes to clearing and manipulating the data.

We can build relationships especially, you know, if you have other information that you may have from your other systems, you know, from that you may want to bring in and use Access to then, you know, build relationships to, you know, your school user population to those records that you get from NSLDS and, you know, and then be able to then, you know, query accordingly.

Another set of reminders here is that oh, I already talked about this but the comma-delimited files are, you know, a little bit easier to import into Excel or Access and again it's because the columns are predefined through columns you say at the top what kind it is and you don't have to differentiate each separate column by clicking on them.

Okay, like with Excel spreadsheets, Microsoft Access has a very similar import test wizard process that you follow that too much like we did with Excel but then the nice feature about using Microsoft Access is that you can always save the record layout import.

They have got a utility in there that's a specification tool and what that will allow you to do is once you've defined an import process once, you're going to always save that to then reuse later so then we have to go through record by, you know, field by - position by position by position - each and every time that you want to import the file.

Excel allows you to - or Access, sorry - allows you to define that and give it a specific import specification name so that we can just reuse it over and over and you can that for either comma-delimited or fixed width. Nice lovely little feature. Okay, and I guess that's it.

(Rosa White): So (Jim) we have two questions...

(Jim Yoder): Okay.

(Rosa White): ...that we want to share with you so the first question that we want to share with the group is can multiple people logon and request the same reports at the same time?

(Jim Yoder): Yes, they can, absolutely and the reason being is that when people logon, they're logged-on as their unique user ID and people shouldn't be sharing and logging-on with any other people's user IDs into NSLDS so by the nature of them logging-on, there are two separate occurrences.

They can go ahead and separately request the reports as needed, you betcha, and then what will happen is that depending the user ID as to which mailbox it gets pushed to.

(Rosa White): Okay, let's see, so the second question is the import functionality in Excel savable to import the same file type multiple times?

(Jim Yoder): If there is that functionality to do that, I'm not - I don't know what it is - versus having to define it each and every time that you import it into Excel if you define it as you go through the import wizard and that's one of the nice features about using Microsoft Access is that it allows you to then import it once define each field and give it a specific import specification. That way you can then reuse that over and over every time.

(Rosa White): Okay, so thank you so we'll just make sure if everyone would hold tight, we'll make sure that we have addressed all of the people's questions.

(Jim Yoder): Okay, fair enough.

(Rosa White): Be patient. Well, it looks like those are the questions. We'll continue for those schools that have additional questions, we still have someone that will continue to answer those questions while we're in the session so it looks like we have concluded our Webinar so thank you (Jim) for that very informative session and I want to thank again all of the schools and participants that participated in the Webinar.

Again if you have an opportunity please I'm going to have (Jim) start the survey, perfect, and the survey allows you to provide FSA feedback on this session, any other sessions, and specifically if there are any other topics you would like us to present in any future Webinar, please share that.

I think you have all of the contact information for all of the presenters so please reach out and again thank you again for your participation and your feedback and your comments. Hope this was valuable to you.

END