

# Instructions on how to open & import EDFacts data files

## Using Excel 2016/Office 365 or Excel 2013/prior versions

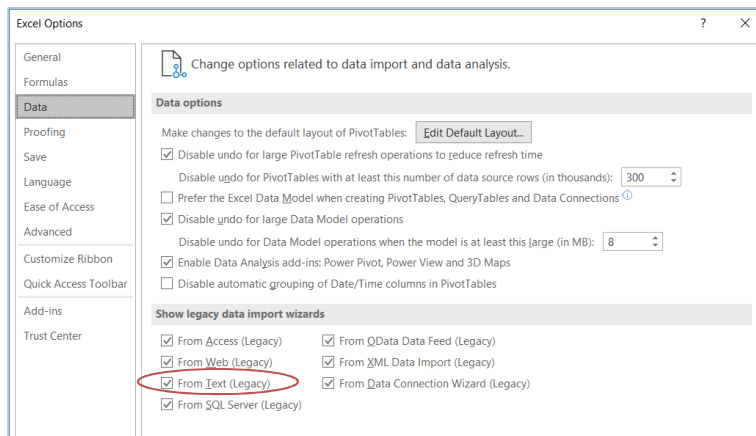
Excel allows you to directly open a comma-separated values (.csv) or text (.txt) files however, Excel may apply a format for the data that drops leading zeroes (as shown below), change the date format, and display phone numbers and other data with special formatting incorrectly. This guide will walk you through the process to use Excel's power query to control the import of EDFacts data.

*Example of an EDFacts .csv file opened in Excel*

SCHOOL_YEAR	FIPST	STATENAME	ST	SEANAMI	STATE_AG	MSTREET1	MSTREET2	MSTREET3	MCITY	MSTATE	MZIP	MZIP4	LSTREET1	LSTREET2
2017-2018	1	ALABAMA	AL	Alabama	S	1 PO Box 302101			Montgomery	AL	36130		2101 50 North Ripley Street	
2017-2018	2	ALASKA	AK	Alaska	De	1 P.O. Box 110500			Juneau	AK	99811		500 801 W. 10th Street	Su
2017-2018	4	ARIZONA	AZ	Arizona	De	1 1535 W. JEFFERSON STREET			PHOENIX	AZ	85007		3280 1535 W. Jefferson Str	
2017-2018	5	ARKANSAS	AR	ARKANSAS		1 FOUR CAP ROOM 304A			LITTLE ROCK	AR	72201		FOUR CAP ROOM 304	
2017-2018	6	CALIFORNIA	CA	California		1 1430 N Street			Sacramento	CA	95814		5901 1430 N Street	
2017-2018	8	COLORADO	CO	Colorado	I	1 201 EAST COLFAX AVENUE			DENVER	CO	80203		1799 201 EAST COLFAX AVE	
2017-2018	9	CONNECTICUT	CT	Connecticut		1 PO Box 2219			Hartford	CT	6145		2219 450 Columbus Boulev	

## Excel 2016 or Office 365

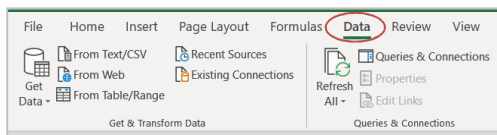
If you prefer, the Excel legacy import wizards can be used by clicking on **File > Options > Data** and choosing the wizards you'd like to use. When using the legacy wizards, follow the instructions for importing data using **Excel 2013/prior versions**.



To use **Excel Power Query** to import a .csv or .txt file to a new workbook, follow these steps:

1. **Open Excel** and navigate to the **Data** tab; in the **Get & Transform Data** section, click on the **Get Data** icon.

*Figure 1: Data tab contents*

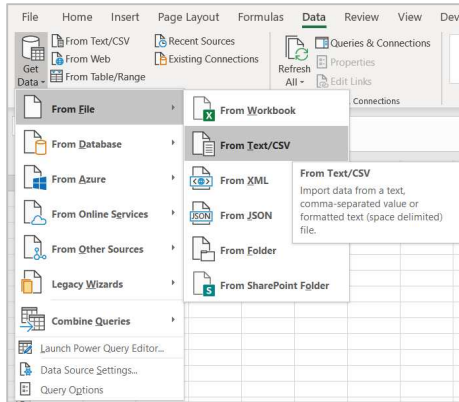


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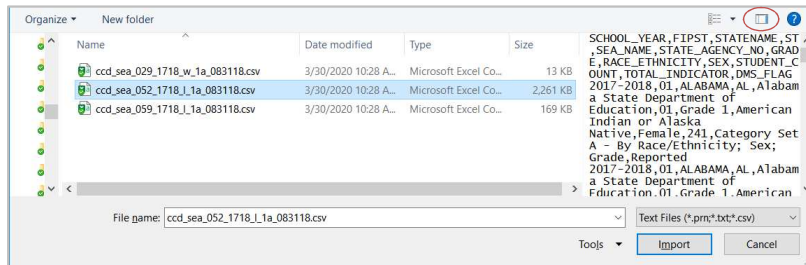
2. Select the file type of the file to be imported. From **Get Data**, click **From File > From Text/CSV**.

Figure 2: Data import options



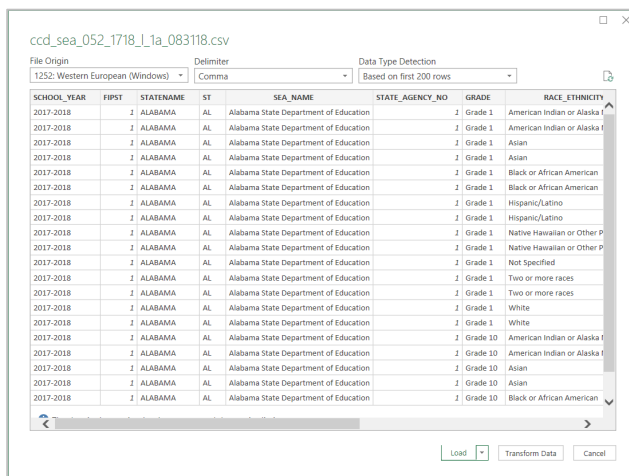
3. Select the file to be imported; note that the file contents are displayed in the right side of the window if the preview option is selected.

Figure 3: File Explorer pop up window with file preview option circled



4. From the **Get & Transform** feature, choose **Transform Data** to adjust the data type for each column.
  - The default settings for “Data Type Detection” use the first row for column headers and assigns the data type (as text, number, integer, etc.) based on the first 200 rows in the file.

Figure 4: Get & Transform window

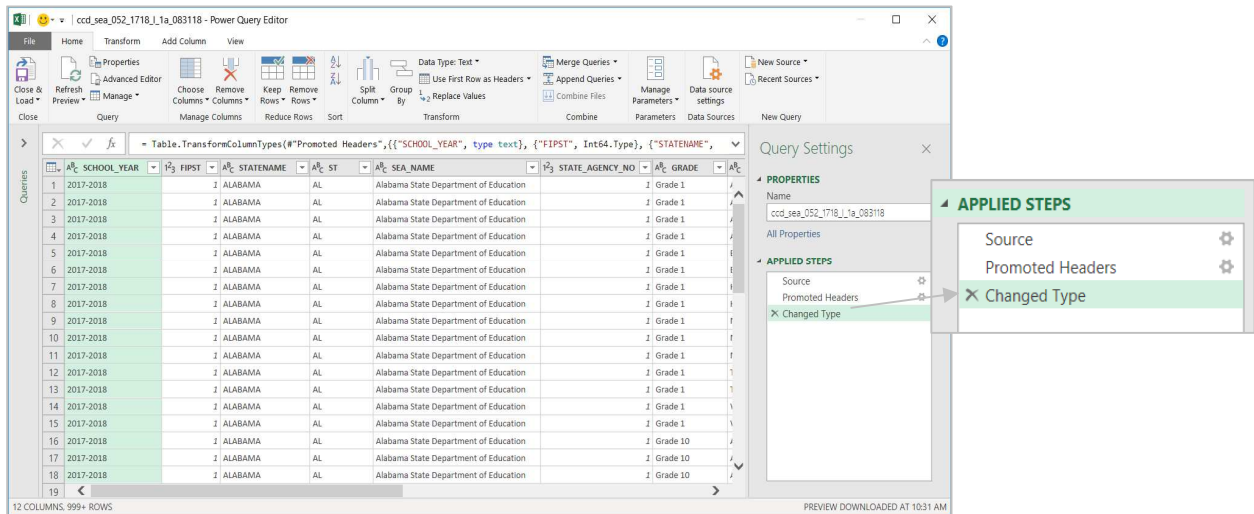


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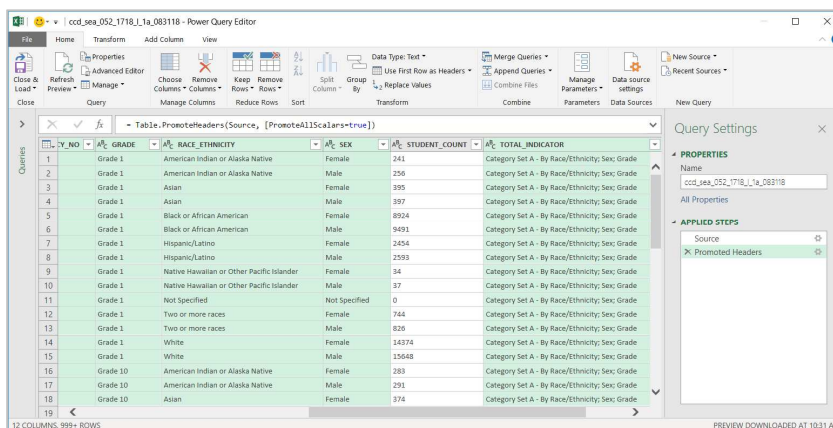
- Data in the file will be displayed in the Power Query Editor.
  - Columns **FIPST** and **State Agency No** have a data type integer in the example below and will be changed to text because they contain leading zeros.
  - In the **Applied Steps** side bar, “**Changed Type**” will be applied by default.

Figure 5: Power Query Editor



- Delete the “**Changed Type**” step (click on the ✕ next to the step) and choose the columns to change.
  - Hold the **shift key** and use your **left mouse button** to select highlight a continuous block of columns, or hold the **control key** and use your **left mouse button** to select multiple, non-continuous columns in the data set.

Figure 6: Selecting columns to set the data type.

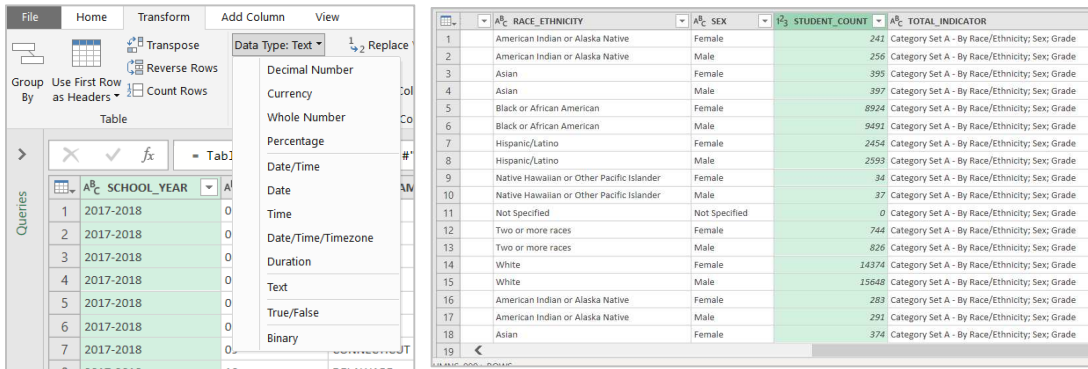


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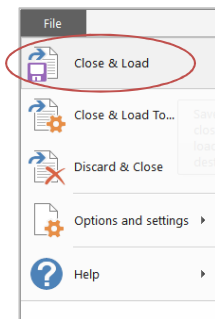
- From the **Transform** tab, choose the appropriate **Data Type** from the drop list.
  - In this example, **Student Count** was set to a **Whole Number**.

Figure 7: Choose the Data Type



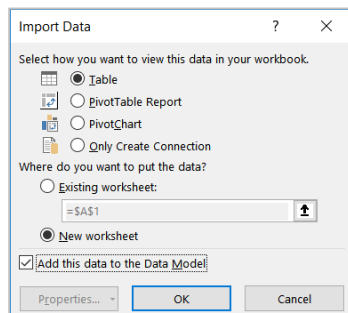
- Complete the import by clicking on **Home** or **File > Close & Load**.

Figure 8: Close & Load



- Alternatively, choose **Close & Load to...**
  - Load to a table: A pop up box allows data to be loaded to a “Table,” which produces the same result as **Close & Load**. Data can also be loaded to a “PivotTable” or “PivotChart,” or a data connection can be created.
  - Create a connection: If “Create Connection” is chosen, the data does not load but is accessible through the Query Editor and can be used in other Excel Queries.
  - Tip: The default setting for power pivot adds the table to Excel’s Data Model.*

Figure 9: Options for Close & Load to...



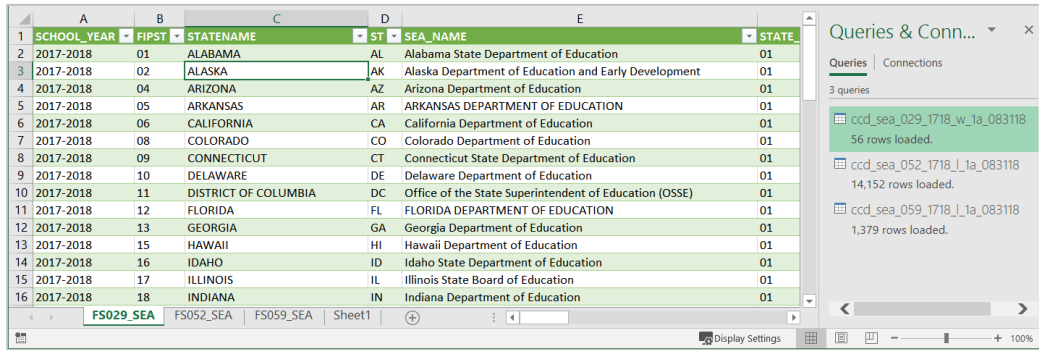
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10. Data will load to a table in the workbook.

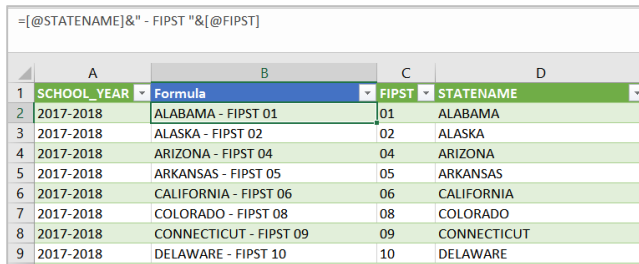
- The import query appears in the side bar on the right and shows the total row count for the file.
- If you close the side bar and want to see it again, select **Data > Queries and Connections**.

Figure 10: Data imported to a Table



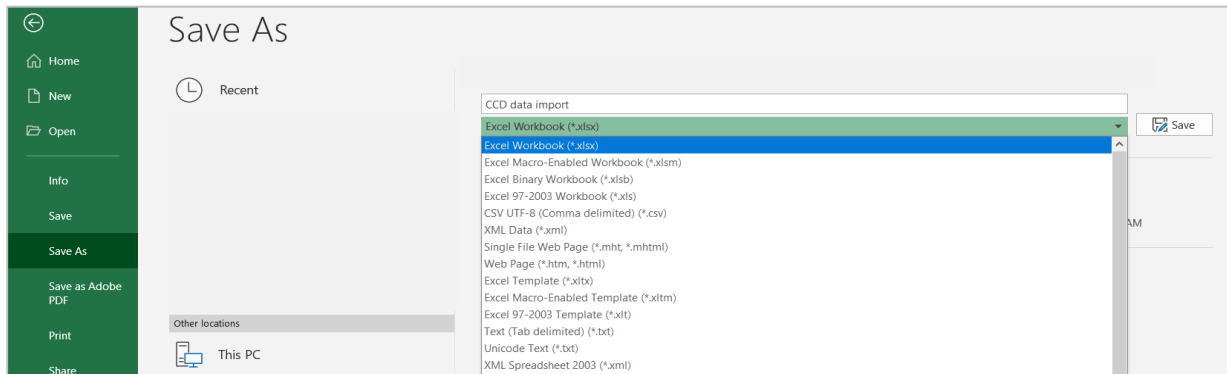
11. Columns can be added to the table and formulas entered in those columns. A formula in a table column can use the structured reference for the column name, such as `[@FIPST]`, or a range like B:B.

Figure 11: Data imported to a Table



12. Save the file as an Excel workbook to retain the data connections and table format.

Figure 12: Save File As



# Instructions on how to open & import ED Facts data files

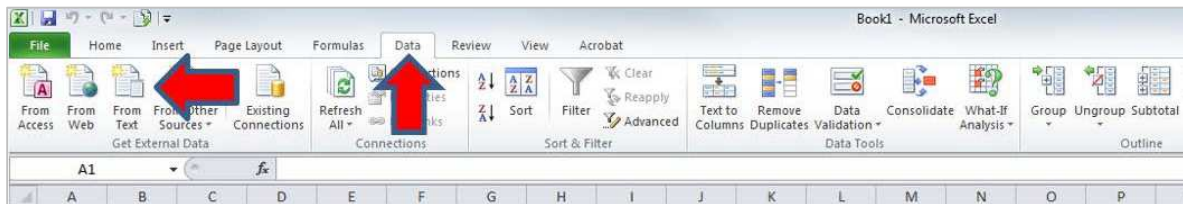
## Using Excel 2016/Office 365 or Excel 2013/prior versions

### Excel 2013

Excel 2013 and earlier versions use a simple and straightforward process for opening and importing text files. When transferring files from .csv format to .xlsx format, some of the values displayed as ranges are read as a date if the file is opened directly into Excel. To prevent this, save the flat file (.csv) before opening it. Once the file is saved, follow the steps below to import the data into Excel.

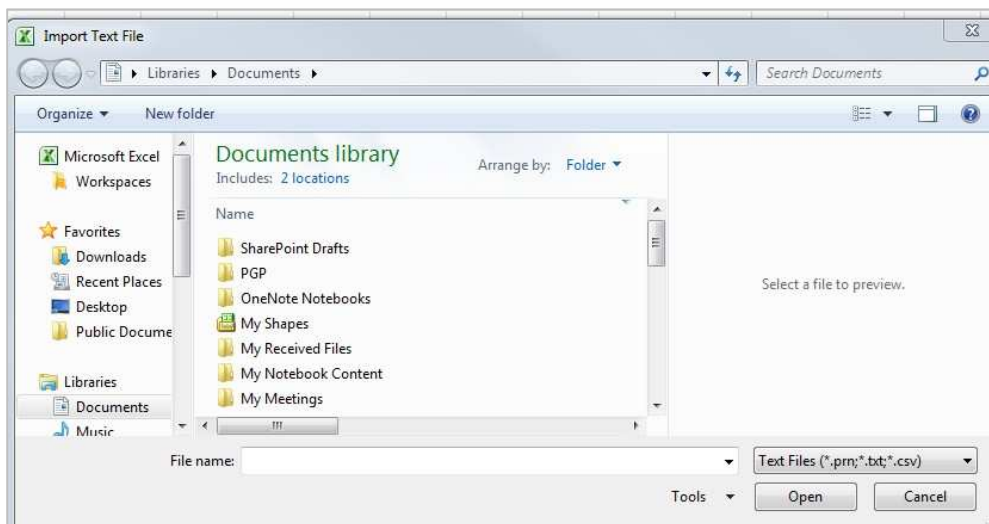
1. In the **Data** tab, click **From Text** in the **Get External Data** section of the tool bar.

Figure 13: Data tab contents



2. From the pop-up file explorer window, select **Text Files (\*.prn, \*.txt or \*.csv)** from the lower right hand side drop-down; click **Open**.

Figure 14: Select Data file

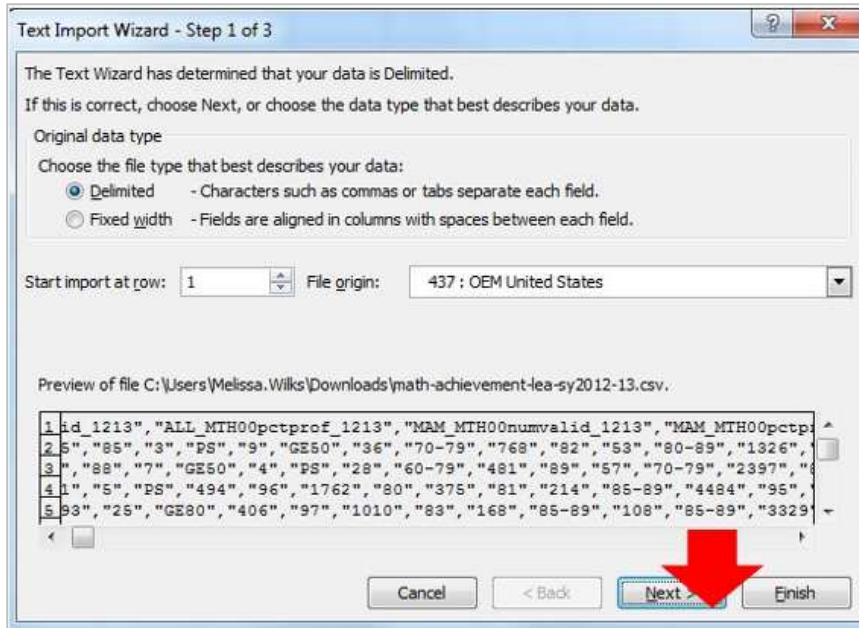


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## Using Excel 2016/Office 365 or Excel 2013/prior versions

- The settings **Delimited** and **Start import at row 1** are selected by default; click **Next**.

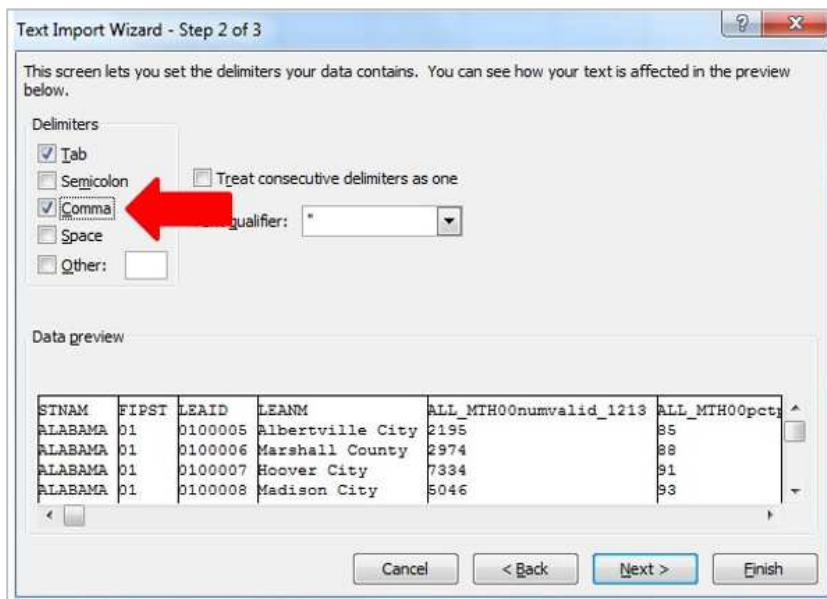
Figure 15: Text Import Wizard Step 1



- Select **Comma** for the delimiter type; Quote (") for the Qualifier; click **Next**.

– Note: **Tab** is the default selection when opened. It can either be unchecked or left as is.

Figure 16: Text Import Wizard Step 2

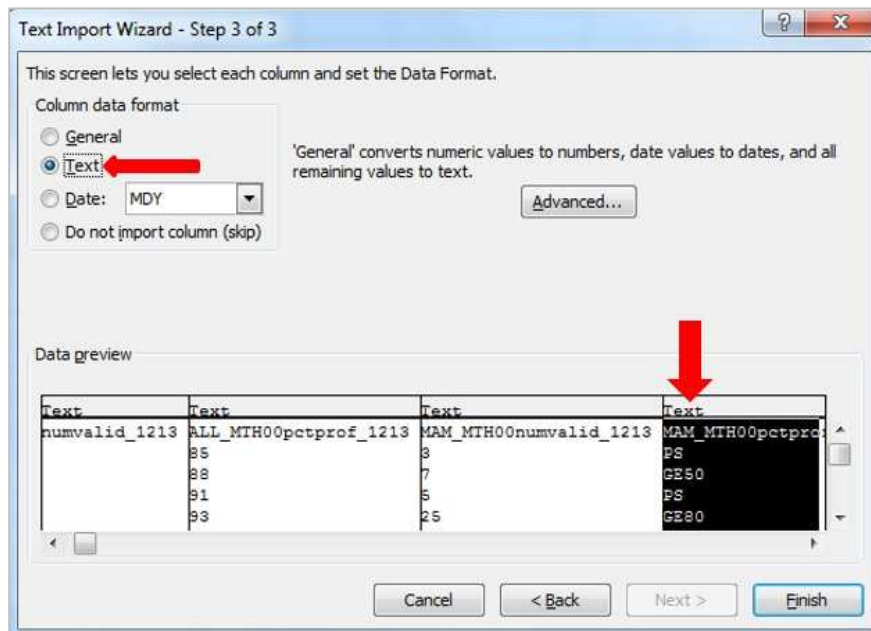


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- For every column, *even those with numeric data*, change the data format from **General** to **Text**: click on **Text** and highlight each column by clicking on it. Once all the columns are changed to text format, click **Finish**.

Figure 17: Text Import Wizard Step 3



- The file may also be saved as a .csv or .txt and reopened without having to repeat this process. The file can also be saved as an Excel workbook by choosing **Save As** and selecting an appropriate Excel file type.