



# **Using the HEI Data Entry Screens**

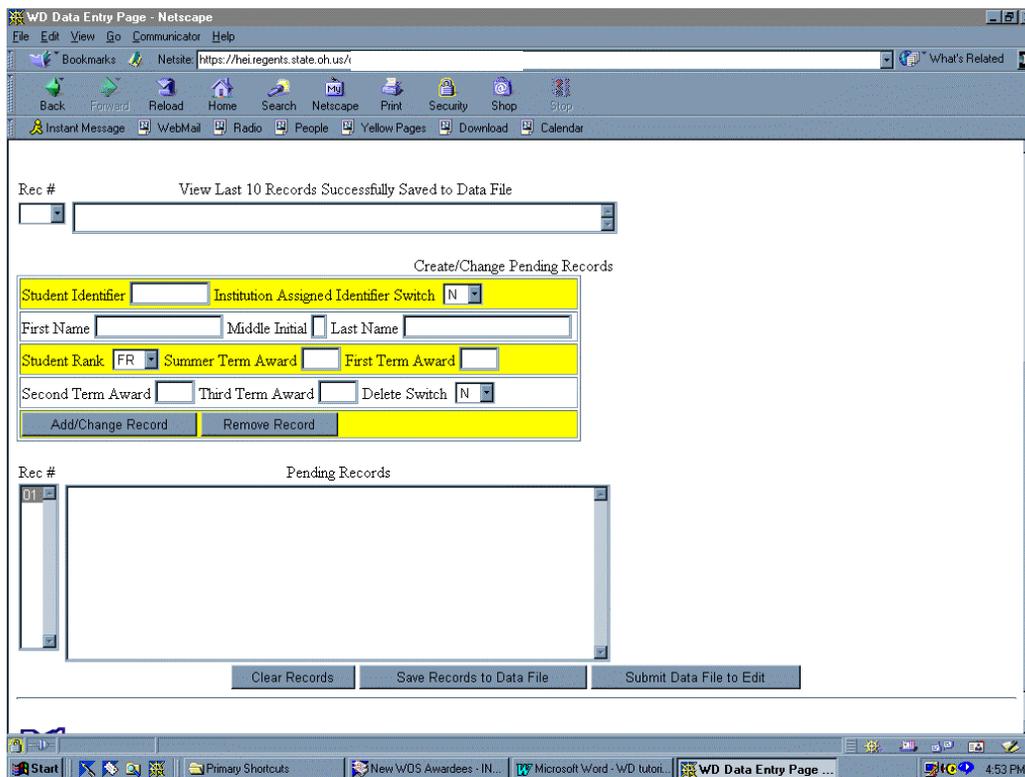
A Tutorial for:

File creation  
File submission

Throughout this document we provide example illustrations. Please note that for example purposes we are using the financial aid data area and the Workforce Development (WD) and Proficiency Award (PA) files. If you are a reporter for a different data area the screens will have the same format, but the information of the screen will reflect your data area.

➤ Creating a file through the HEI Data Entry Page

The Data Entry Page provides a screen in which you can key records and save them to a file that is formatted for submission to HEI. The screen applies edits to each field as you enter the information. It also creates a proper header record for the file.



The screenshot shows a Netscape browser window titled "WD Data Entry Page - Netscape". The address bar shows "https://hei.regents.state.oh.us/". The page content includes a "Rec #" dropdown menu with the text "View Last 10 Records Successfully Saved to Data File". Below this is a section titled "Create/Change Pending Records" with several input fields: "Student Identifier", "Institution Assigned Identifier Switch" (set to 'N'), "First Name", "Middle Initial", "Last Name", "Student Rank" (set to 'FR'), "Summer Term Award", "First Term Award", "Second Term Award", "Third Term Award", and "Delete Switch" (set to 'N'). There are two buttons: "Add/Change Record" and "Remove Record". Below this is a "Pending Records" table with a single record (Rec # 01). At the bottom are three buttons: "Clear Records", "Save Records to Data File", and "Submit Data File to Edit".

There are three steps to using the Data Entry Page:

- 1) Add/Change Record - Click on this button after keying all the necessary fields for an individual record. This stores the record in your browser and displays it in the area labeled "Pending Records." Repeat for additional records. Note that these records are stored only in your browser and will disappear if you close your browser without saving them using step 2 below. (You can also use the 'Add/Change' button to change records you have already keyed: select a record number from the 'Rec #' box next to the 'Pending Records' box, change the relevant fields using the data entry boxes, and then click on the 'Add/Change Record' button).
- 2) Save Records to Data File - Click on this button after you have entered a batch of records (up to a maximum of 10). This allows you to save your work so that you can return to it later and either enter more records or submit it to HEI. You can go back to step 1 if you



need to enter more records. Please note that once you have saved a record, you cannot change it using the Data Entry Page.

- 3) 3) Submit Data File to Edit - Click on this button to perform system edits against all the records in your file. These edits include searching the HEI system for duplicates. After clicking on this button, you can go to the Data Input Site to view the results of these edits. Any additions or corrections must be submitted in a subsequent file. (Note that when you click the 'Submit Data File to Edit' button, you are given the option of downloading a copy of your file to your PC. If the edit results indicate that corrections are necessary, you can make the corrections to this file and submit it to the Data Input Site as described below).

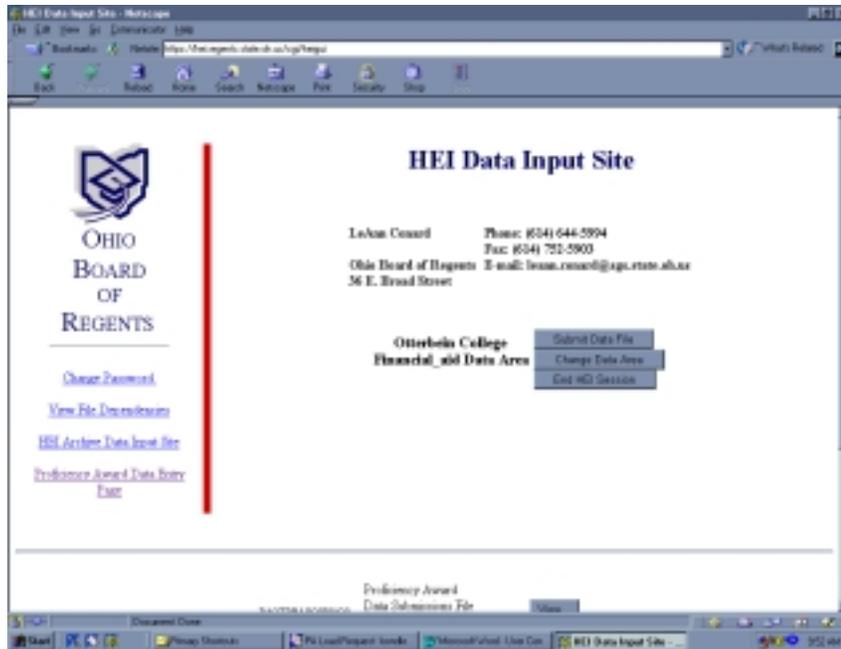
Please be advised that the editing process is all or nothing with a file. All fields for all records in a file must pass the edits in order for HEI to process it.



**(Please go to page 5 if you have created a file through the Data Entry Page.)**

➤ **Creating and submitting ASCII Text files through the HEI Data Input Site**

You can also create and submit ASCII Text HEI files using your own software such as Excel or Word through the HEI Data Input Site. The file formats and descriptions can be viewed in the data submissions documentation for each file. After you have created your ASCII Text file, access the Data Input Site and select the data area in which you will be submitting files and click on the “Continue” button. The screen below will appear.



Select “Submit Data File” to begin the file submission process for your ASCII Text file.



You must know where you have saved your file and it must be in a location that can be accessed through your PC. Select the appropriate HEI file name and term in the Submissions Data text box. Then, select Browse in order to tell Netscape the location and file name that you are submitting. To complete the process, select Submit File.

Note: The editing process is all or nothing with a file. All fields for all records in a file must pass the edits in order for HEI to process it.



➤ Request Load files from the Data Input Site

After you have created, saved and submitted a file for editing, you must still complete one more step - Request Load. This is the final confirmation that you give to request that HEI merges the new records and overwrites the replacement records in the HEI system.

Select Request Load next to each file that you wish to have loaded into the HEI system.

The files that you select are then reviewed by an HEI analyst and then approved for loading. This is performed midday and evening after the analyst's review

WDDAVI2001NA01	Workforce Development Data Submissions File 08/14/2000 13:14, 2.3K	View...
WDDAVI2001NA02	Workforce Development Data Submissions File 08/15/2000 14:32, 0.3K	View... Delete
WDDAVI2001NA03	Workforce Development Data Submissions File 08/15/2000 15:13, 0.1K	View...
WDDAVI2001NA04	Workforce Development Data Submissions File 08/15/2000 16:32, 0.1K	View... Delete Request Load



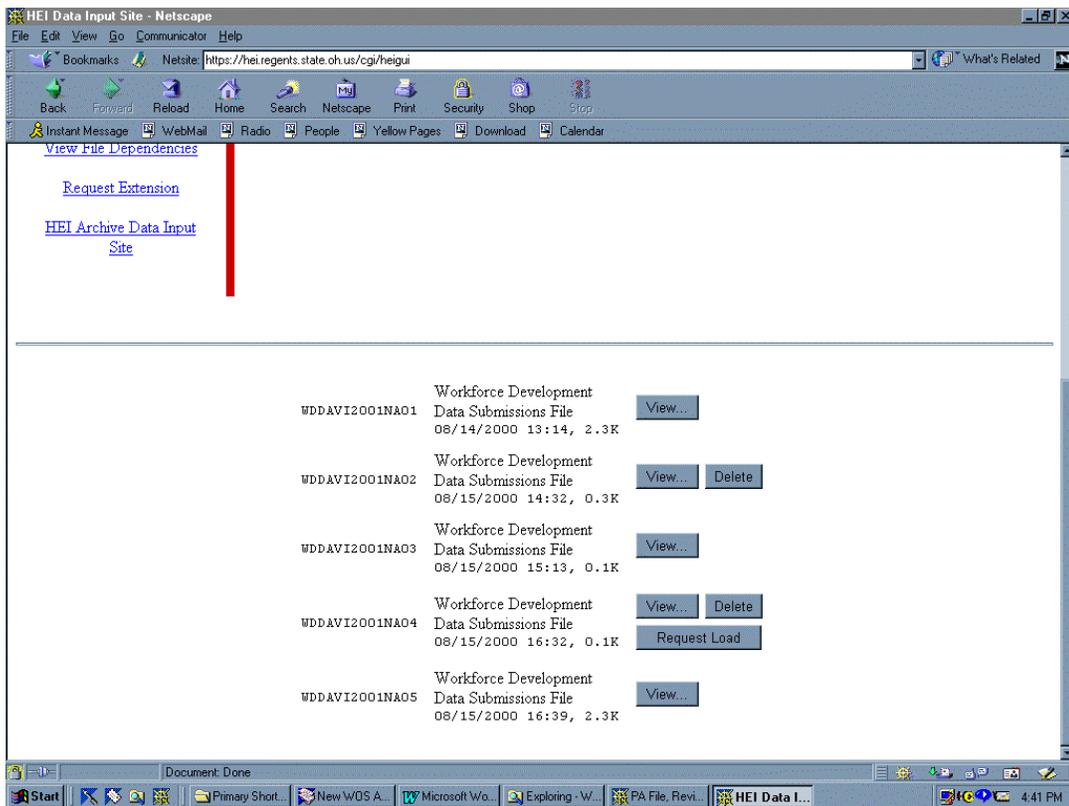
➤ Viewing Activity on the Data Input Site

The files for the data area appear in the order of the file name. This name is assigned by HEI and is based upon:

- File type - the two character code assigned to the type of records contained in the file
- Institution code
- Year
- Term
- Sequential number

The list of files includes those submitted through Data Entry Page and those created independently and submitted through the Data Input Site.

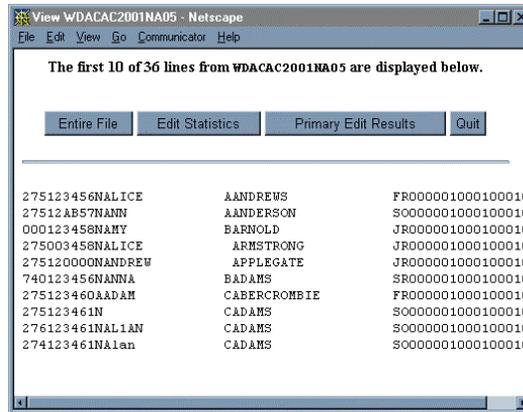
In some cases, the number of files will exceed the space allowed on your screen. You may need to scroll down to view the more recent files.



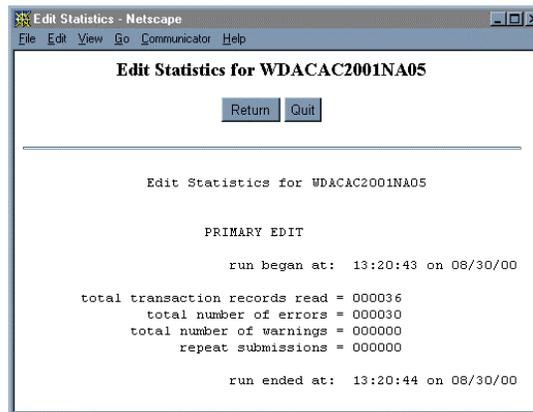


➤ Viewing file and edit results

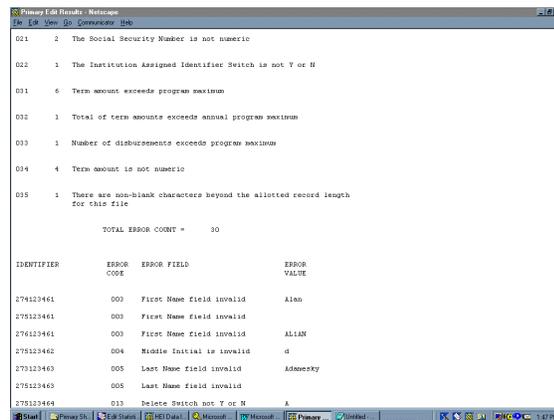
Select View at Data Input Site



Select Edit Statistics to see a summary of the edit results for the file. This is also sent to the e-mail address of data reporter who submitted the file.



Select Primary Edit Results to view the detail regarding any errors.



For details on edits performed to submitted record, please view the edit and load specifications.