

FINANCIAL DATA DISCUSSION - SESSION 5.2

TOPIC 1 - DATA ENTRY SCREENS:

The data entry screens are new features introduced to the financial data area this year. These screens are useful tools for the data reporter who does not wish to or may not have the IT resources to create text files for each of the required financial files. The document used for the discussion and demonstration was "Using the HEI Data Entry Screens." This tutorial is available on our web site at:

http://www.regents.state.oh.us/hei/datasubdoc/general/data_entry_tutorial.pdf.

Some of the important issues discussed were as follows:

- ⇒ The Data Entry Portal is located in the Data Input Site
- ⇒ Only the files you are able to submit or the files with open edit windows will be viewable from the "submission" window.
- ⇒ Each field of the record has built in edits; also, an edit will place the leading zeros in numerical field values.
- ⇒ The "add/change" button only allows temporary storage of a record.
- ⇒ The "save record to data file" option is where the text file is built along with a header record. In addition, after entering 10 records, you must save the records.
- ⇒ The "submit data file to edit" option will perform system edits against all records in the file. At this point, you can download a copy of the file to your PC.
- ⇒ These data entry screens are most useful with files that contain 20 or fewer records.

TOPIC 2 - BASIC DATA SERIES (BDS) REPORTS:

The creation of the 1999 reports is the first financial reports from the Higher Education Information (HEI) System. Expected release dates are yearly for these reports, unlike an every two years release of the reports created in the old Uniform Information System (UIS).

Location: These reports are accessible from our HEI web site by choosing "Reports" under "HEI Outputs." From the "HEI Reports" page, choose "HEI Data Publications." The reports illustrate the revenues by source, total education and general expenditures, and expenditures incurred to support the educational mission of the campus. You are able to view the reports by using the OBR Report Viewer or you may download a copy of the data to an Excel file.

TOPIC 3 - IPEDS DOWNLOAD FILE:

This is another new feature created for the financial data area. The purpose of the IPEDS Financial download (II) file is to give public institutions the ability to download a file that can be submitted electronically to the National Center for Educational Statistics (NCES) for the IPEDS Finance F1 Survey. The version of the download file available to your institution depends on whether you are a single campus or a multiple campus institution. You may view and download this file if you have access to the Changes in Current Funds (CF) file.

Location: From HEI Homepage under "HEI Outputs" select "Download your Institutions HEI data." Choose the IPEDS Financial download (II) file from the "File ID" menu.