



# HEI Training Session

Training for  
New Data Reporters



HEI Web Pages.....	2
Building the Data File and Submitting the File to the Edit Process .....	3
Using the HEI Data Entry Screens to create data files.....	6
Troubleshooting Data Files and Viewing Edits.....	10
Loading files from the Data Input Site.....	17

*This manual is intended for new data reporters for the HEI system. Please note that examples in the manual will be drawn from several different HEI files.*



## HEI Web Pages

The HEI Web pages contain instructions and information about how to submit data to HEI. The HEI Home Page is located at: <http://www.regents.state.oh.us/hei/index.html>

The HEI Home Page is divided into 4 sections: HEI Development and News, Process Descriptions, Submitting Data, and HEI Outputs. This section briefly touches on some of the pages that are used most frequently by new HEI data reporters.

### **The People Page**

The link to the People Page is located under the HEI Development and News heading. Clicking on this link will take you to: <http://www.regents.state.oh.us/hei/people.html>. The People Page provides links to different types of contacts for HEI. In particular, you can use these pages to identify who on your campus is the HEI Financial Aid Contact for your institution. You will need this information if you ever have questions about account access. Your Financial Aid Contact administers your Web account and can provide you with the access you need to work with HEI.

You can also use the People Pages to find out who on your campus is responsible for various files and who to contact at HEI offices.

### **Data Submissions, General Information**

The link to the Data Submissions, General Information Page is located under the Submitting Data heading. Clicking on this link will take you to: <http://www.regents.state.oh.us/hei/datasubdoc/general/geninfo.html>. This page provides general information on submitting data to HEI. We strongly encourage data reporters and other HEI customers (such as, liaisons and financial aid contacts) to familiarize themselves with all the information provided on these links. These links work as an HEI instruction manual.

### **Data Files Links**

Under the "Submitting Data" heading on the HEI Home Page, there are several links to Data Files. These are the 5<sup>th</sup> through 9<sup>th</sup> bulleted items under the heading. HEI files are categorized under these bullets. You will need to know what the data area is for your file to locate your file. Each of these links will take you to a page that has the data submissions documents for the files that you submit.

### **HEI Outputs**

The HEI Outputs section appears on the bottom left hand corner of the HEI Front Door (<http://www.regents.state.oh.us/hei/>). This section provides links to HEI data, reports, and queries that you can use on your campus.



## **Building the Data File and Submitting the File to the Edit Process**

### **Getting Started**

To submit files to HEI you must have an HEI user account. Ohio Board of Regents (OBR) staff do not manage user accounts. User Accounts are managed by HEI Liaisons at your campus. If you need access to submit files (or to use queries) you must contact the liaison at your campus. You can find your liaison's name and contact information on the liaisons Web page located at: [http://hei.regents.state.oh.us/cgi-pub/hotlink?\\$people\\_page?@PAGE=%22liaison%22](http://hei.regents.state.oh.us/cgi-pub/hotlink?$people_page?@PAGE=%22liaison%22)

In addition, you will need access to Netscape Navigator 4.x (note that you must have some version Netscape 4 to get access to the database). You will find that some queries are accessible using Explorer, but you will not be able to use the Data Input Site.

### **The Submittal Process**

Data reporters must take the following steps in preparing files to be loaded onto the database. For colleges and universities with multiple campuses, one file for the entire institution (all campuses) is to be submitted, not one file for each campus.

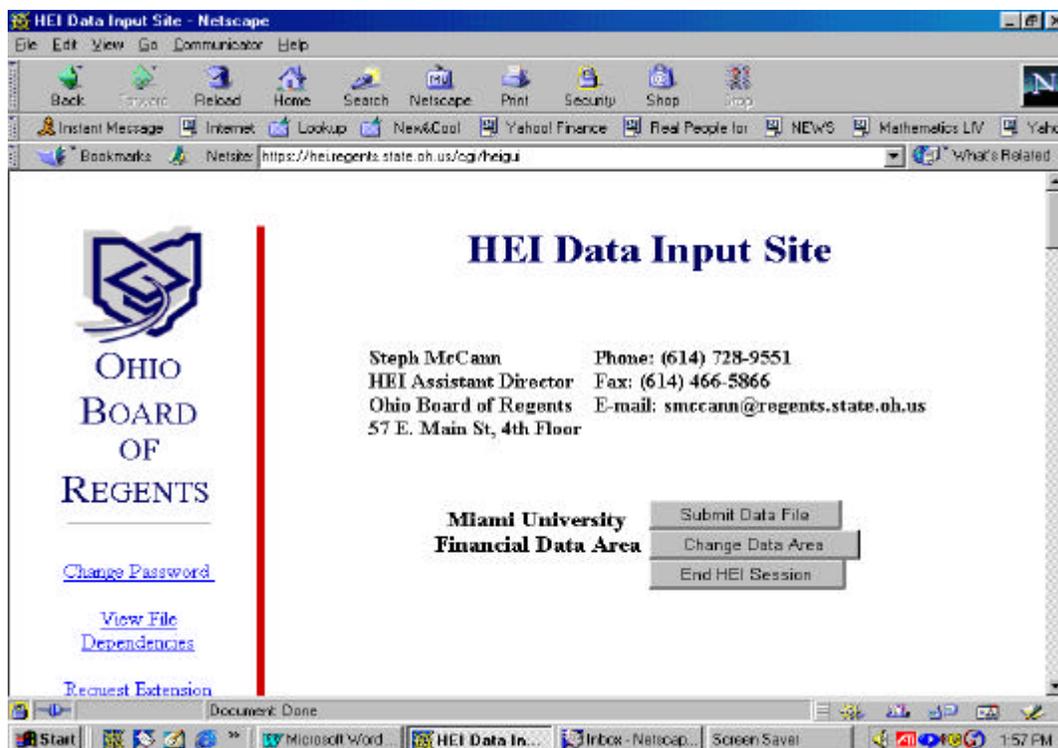
1. Create the file in ASCII text format. (MacIntosh users should save the file in a "DOS text" format.) You can create the file using your own software (or alternatively, using a data entry screen as described in this document below).
2. Organize the contents of the file according to the **Data Submissions Document** for the file. The File Header Record must be the first record in the file.
3. Use the Data Input Site to submit the file to HEI and execute the edit program.
4. If the edit program shows the data file to contain errors, make corrections and repeat step three; do this until the file has zero errors.
5. Review the Summary Edits to ensure that file is complete and accurate.
6. When the file has zero errors and is fully accurate, use the Data Input site to request that the file be loaded to the database.

**It is important to note that all files submitted must have zero errors before they are loaded to the database.** The amount of time allowed to submit, edit, and correct a file, known as the "edit window," varies from file to file, depending on the data elements within the file. For a detailed listing, see the File Submissions Schedule located at: <http://hei.regents.state.oh.us/cgi-pub/subschedule>.

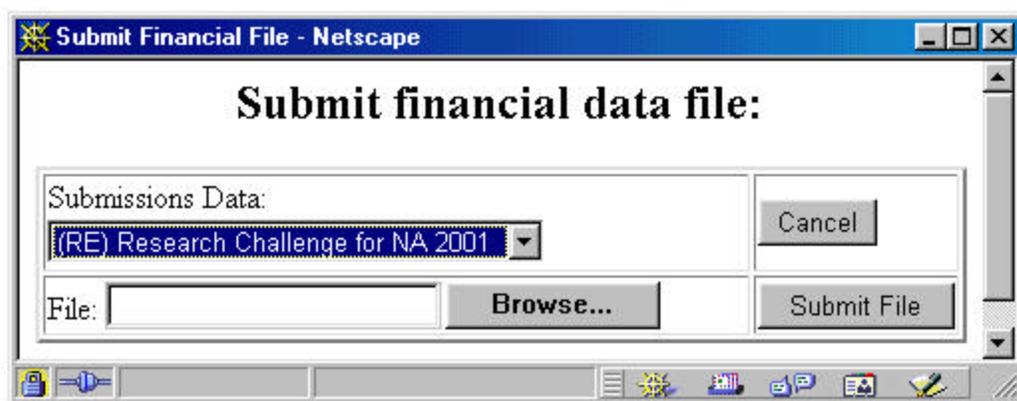


## Submitting ASCII Text files through the HEI Data Input Site

You can create ASCII Text HEI files using your own software such as Excel or Word and then submit them 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.



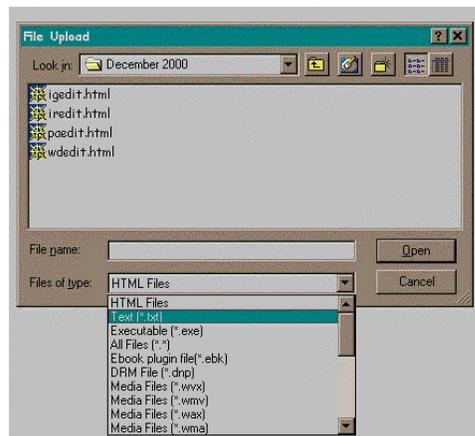
Select “Submit Data File” to begin the file submission process for your ASCII Text





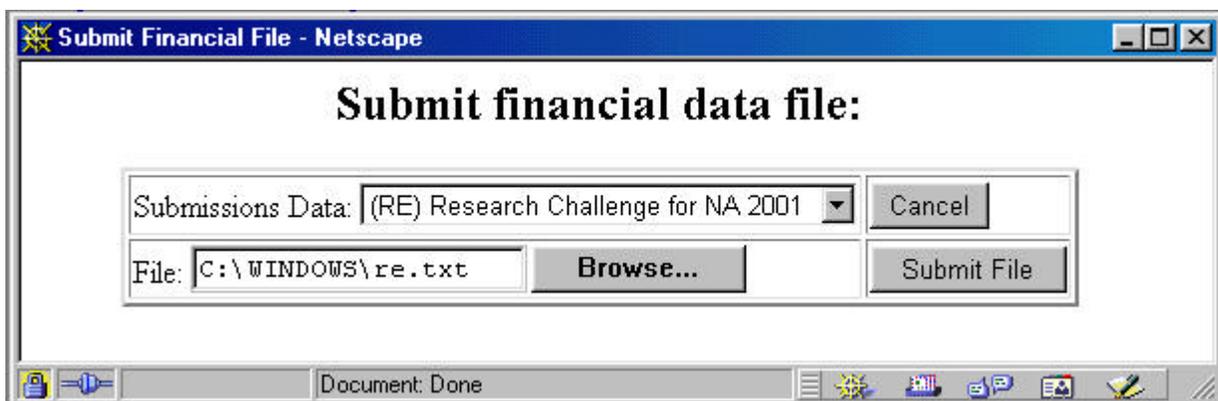
file.

You must know where you have saved your file and it must be in a location that can be accessed through your PC. In the Submissions Data text box, select the type of file, term and year of the file you wish to submit. Then, select Browse in order to tell Netscape the location and file name that you are submitting.



Be sure that you have selected the correct File of type to be sure that you will be able to view your file. Select the file, then select Open.

Verify that the name and type of file you are submitting are correct.

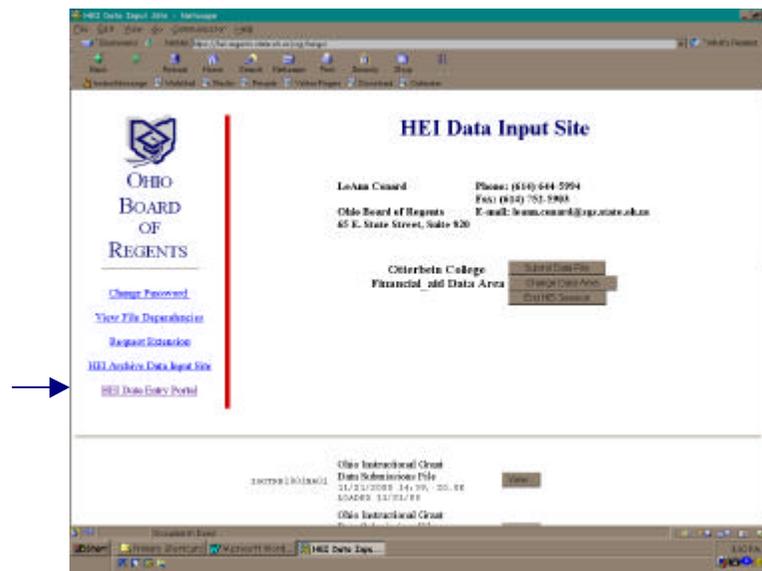


Select Submit File to complete the process.

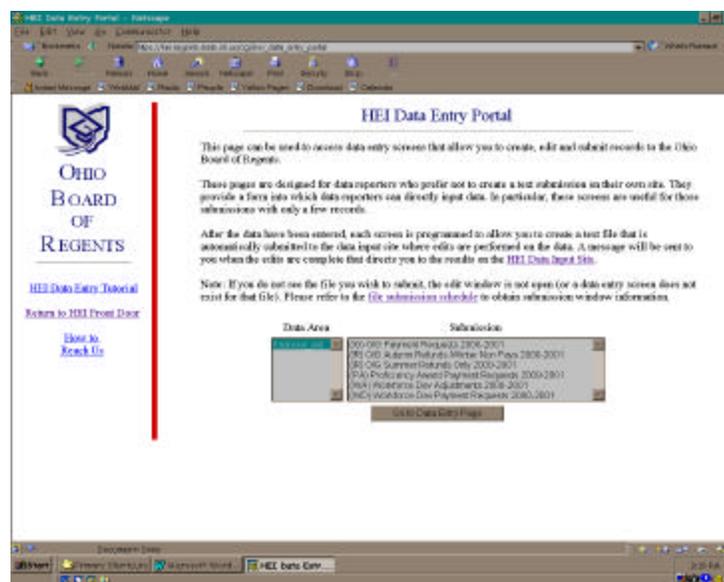


## Using the HEI Data Entry Screens to Create Data Files

The Data Entry Screens can be accessed from the HEI Data Input Portal. The Data Entry Portal is located inside the Data Input Site. PLEASE NOTE THAT DATA ENTRY SCREENS ARE ONLY AVAILABLE FOR FINANCIAL AID AND FINANCIAL DATA AREAS.



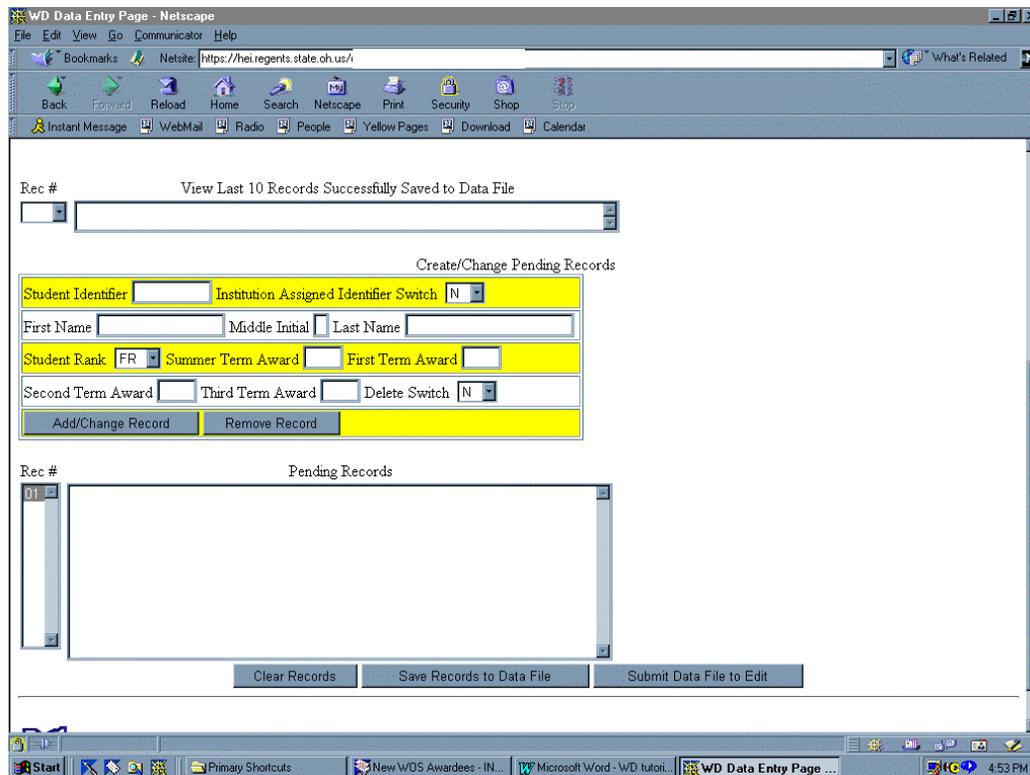
The portal provides a listing of only those files for which you have authorization to submit. To go to the portal for a particular file, select the data area for which you are trying to submit. Next, select the file name from the file menu.





## 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.



There are three steps to using the Data Entry Page:

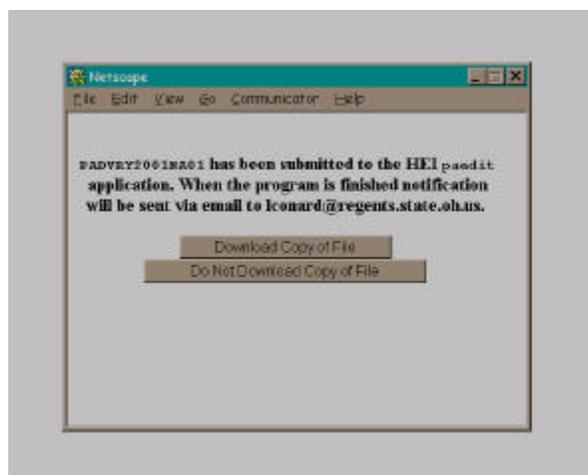
- 1) Add/Change Record - Click on this button after keying all the necessary fields for an individual record. This stores the record in your browser and displays it in the area labeled "Pending Records." Repeat for additional records. Note that these records are stored only in your browser and will disappear 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) 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 note 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.

Once you have selected Submit Data File to Edit, you will see the following confirmation. You will also have the option to download a copy of the file. It is highly recommended that you do save a copy in case the file does not pass all of the edits and you need to edit and resubmit it. (This is covered in a later section.)

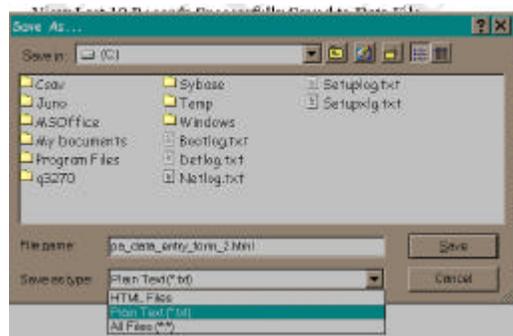




When you select Download a Copy of File, you will be prompted to continue. Select, Save File.



Be sure to save the record as a Text (.txt) file. You should also note the directory into which you are saving the file.





## Troubleshooting Data Files and Viewing Edits

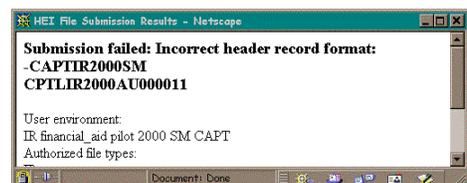
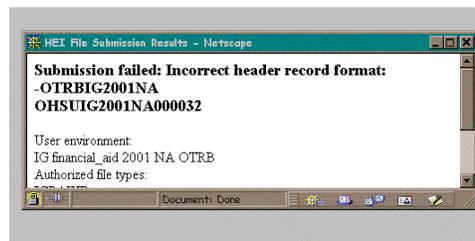
### Header record errors

Before records within a file are evaluated, the header record is reviewed for the following:

- 1) The institution code in the header must be valid. For the correct code, you can refer to <http://www.regents.state.oh.us/hei/datasubdoc/vertables/instcamcodes.txt>
- 2) The institution in the header must be the institution for which the data reporter is authorized.
- 3) The type of file in the header corresponds with the type of file selected in the Submissions Data text box.
- 4) The year and term in the header corresponds with that selected in the Submissions Data text box.
- 5) The type of file in the header must be a type for which the data reporter is authorized. To confirm your authorization, you can refer to the list of data reporters at <http://www.regents.state.oh.us/hei/people.html>
- 6) The number of records within the file does not correspond with the record count in the header.

If an header error is detected, the following message will appear. The first line displayed is the

Institution code  
file type  
submission year  
submission term



The second line is the header record.

The complete header record can be viewed at <http://www.regents.state.oh.us/hei/datasubdoc/general/fileheader.html>





## Errors in records within a file

If a header record is acceptable, the HEI system will review the records against a series of edits. These edits and the logic behind them are published as Edit and Load Specifications at <http://www.regents.state.oh.us/hei/datasubdoc/finaid/faeditload.html>

Some edits will review the data for valid information within a field. For example, a 9-character student identifier is an alphanumeric field and cannot contain punctuation.

Other edits will compare a record against the other records within the same file to prevent duplicates.

Another set of edits will compare each record against information already in the tables or databases for HEI. In some cases, this is to prevent duplicates where only unique records are permitted. In other cases, this is to determine that a corresponding record has been received in order to post an adjustment.

The summary of the results of the editing process will be sent to your email address.

```
Subject: Edit Statistics for IRCAPT2000SM01
Date: Tue, 05 Dec 2000 12:40:54 -0500 (EST)
From: Ohio Board of Regents <heipd@hei.regents.State.OH.US>
To: leann.conard@SGS.State.OH.US, rclay@regents.State.OH.US

Edit Statistics for IRCAPT2000SM01

PRIMARY EDIT

run began at: 12:40:52 on 12/05/00

total transaction records read = 000012
total number of errors = 000019
total number of warnings = 000000
repeat submissions = 000000

run ended at: 12:40:53 on 12/05/00
```



## Identifying errors in records within a file

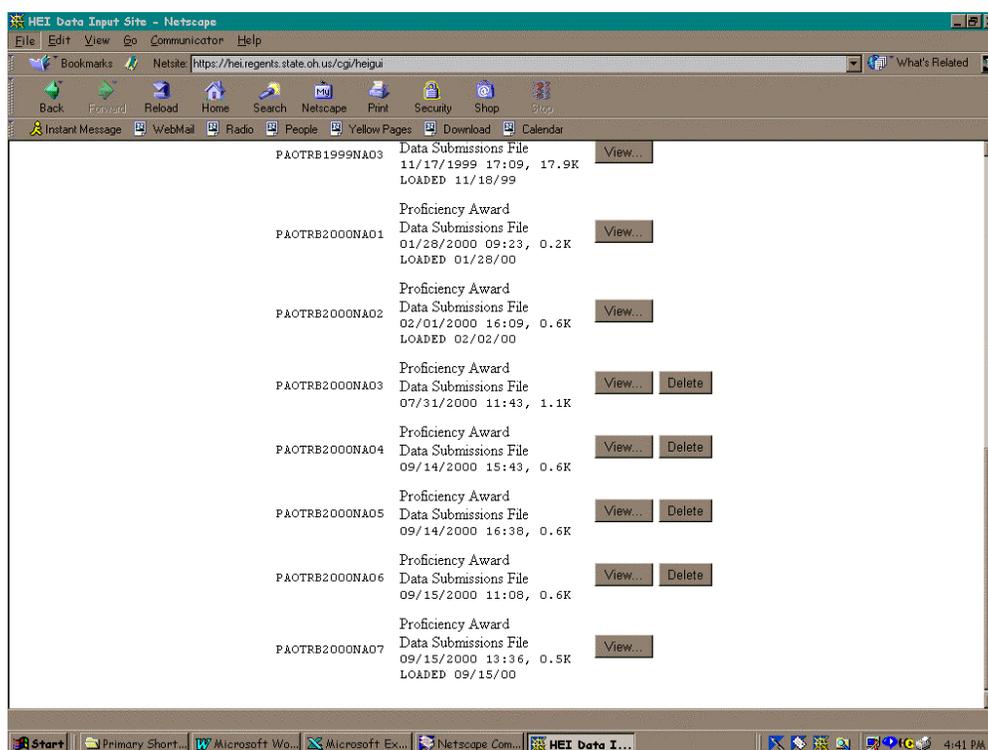
If a file had any errors, you will need to correct them and resubmit the file. None of the records will be processed by HEI. You have two options to continue processing.

You can delete the records that cannot pass the edits and submit the file containing the acceptable records.

You can edit the records (as the header was edited above) and resubmit the entire file again.

Keep in mind that while editing the records within the file may be the most efficient way to create a file that can be submitted to HEI, you may be submitted data that are inconsistent with data in your own system. If your files were generated from a database, you may want to correct the information in your own system and then regenerate the file to submit to HEI.

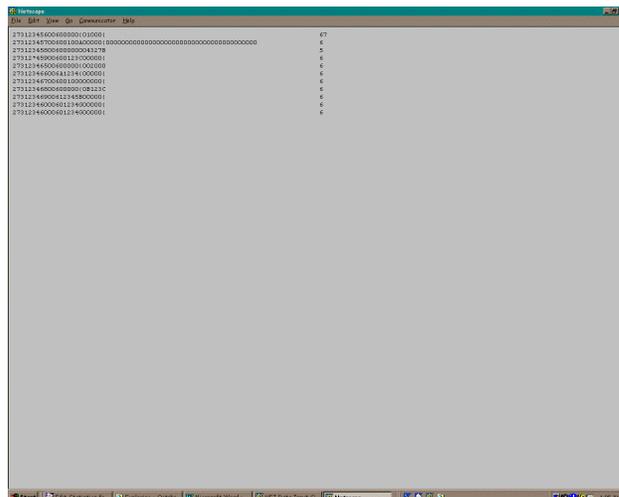
To determine which errors are associated with which records, review the files listed at your Data Input Site. Refer to the file name in your email message to find the correct file.



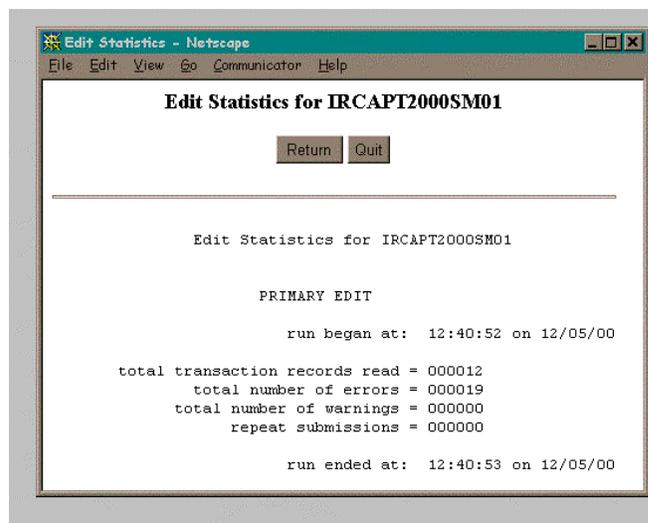




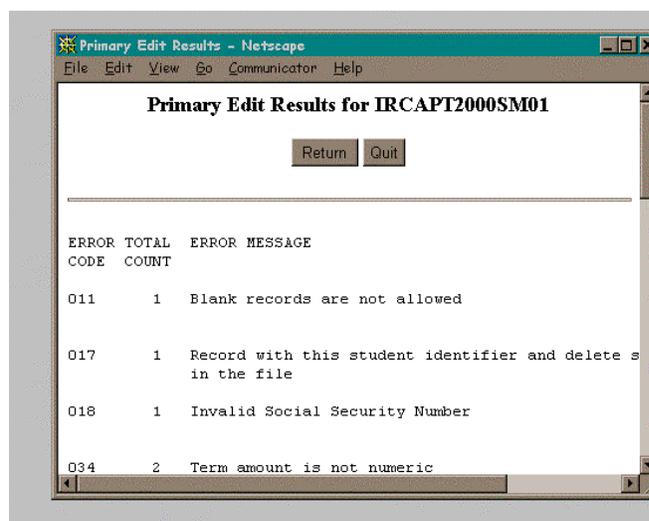
Select Entire file to view the full contents of the file



Select Edit Statistics to see a summary of the edit results for the file. This is the same information that was sent to you via e-mail.



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





## **Interpreting errors**

The first portion of the Primary Edit results lists the types of errors detected and the number of records that have that error associated with it.

The second portion gives a list of each record and error combination, grouped by the errors. If a record has more than one error associated with it, it will be listed more than once.

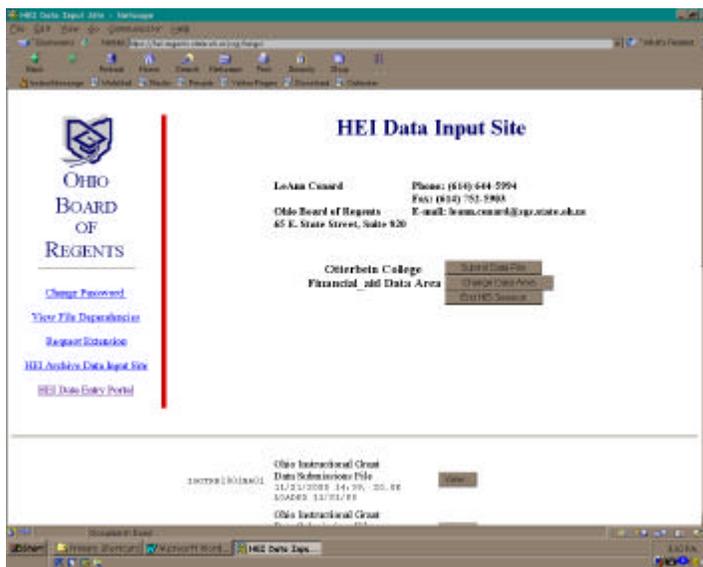
## **Summary Edits**

After your file has passed all primary edits with zero errors. Select the Summary Edit Results option to view the Summary Edits. Summary edits provide tables of data in summary form. These summaries provide you with your first opportunity to see what your data would look like in reports. It also allows you to see if your data make sense when viewed in summary.



## Loading 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.



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

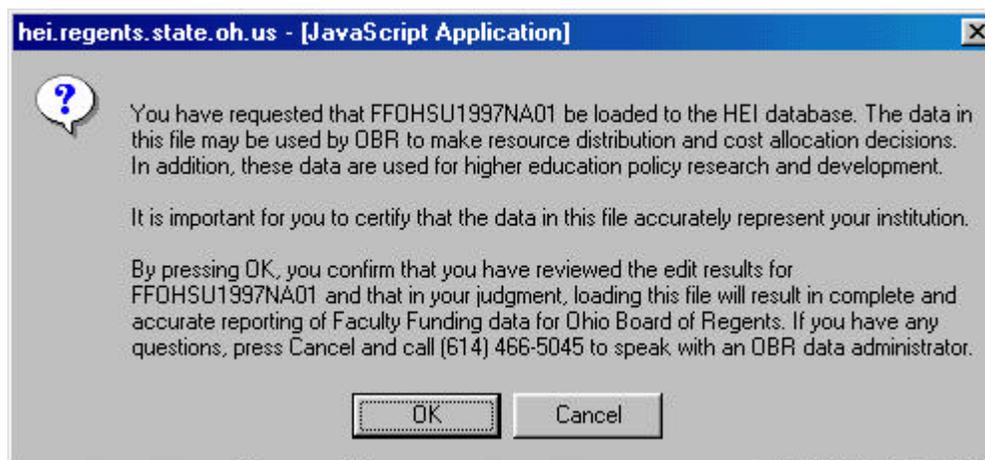
In some cases, the number of files will exceed the space allowed on your screen. You may need to scroll down to view the more recent files.

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



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

You will be prompted to confirm that you have read and agreed with the terms in the Request Load dialog box.



The files that you select are then reviewed by an HEI analyst and then approved for loading. This is performed in the evenings after OBR staff have reviewed the files.