Creating StudentTracker Research Files Using Excel

This guide will help you use Excel to format your StudentTracker research files. If you have questions or need assistance, contact **studenttracker@studentclearinghouse.org**.

STEP 1: FORMAT COLUMNS A-L

- Open a new Excel spreadsheet and highlight columns A through L (columns will appear shaded)

- Select "Cells" from the "Format" menu

- On the "Number" tab of the "Format Cells" window, select "Text" and click "OK"
  (you MUST select text in order to retain the leading zeroes in your school and branch codes, which are required in request files)
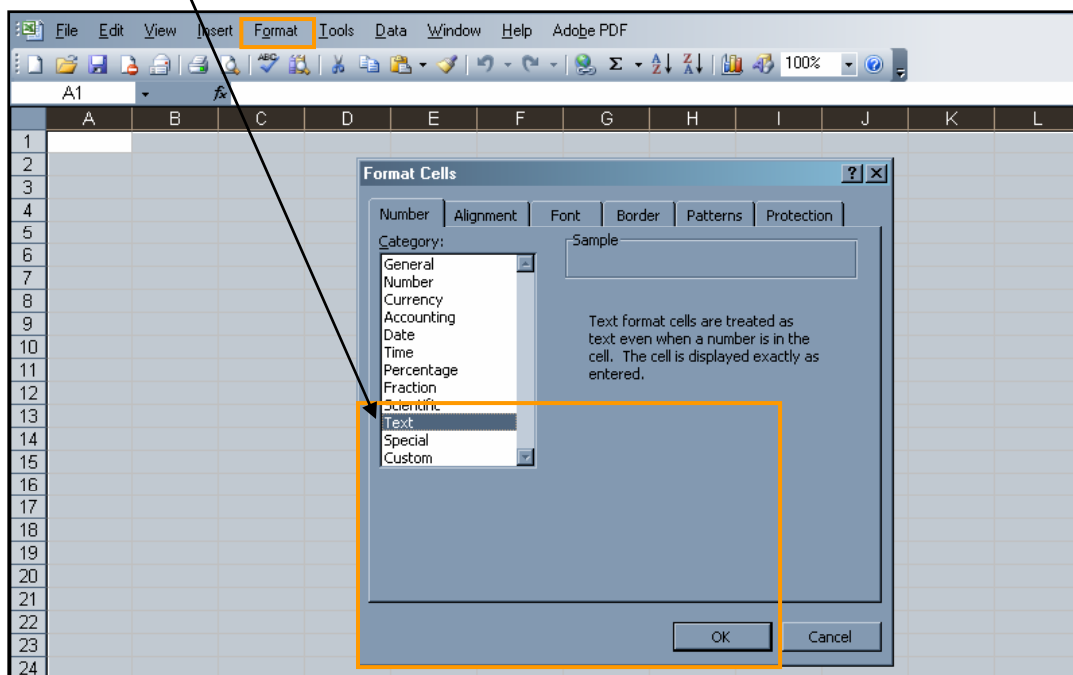

EXCEL TIP

Create YYYYMMDD Format

The required date format for StudentTracker is YYYYMMDD. If your date data is already in this format, you do not need to do anything. If it is not, you will need to create a custom format in Excel. Highlight the column, right click your mouse and select "Format Cells." In the "Category" menu of the "Number" tab, select "Custom."

In the field under "Type," enter YYYYMMDD and click "OK."

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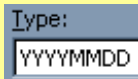
*If you need assistance, contact **studenttracker@studentclearinghouse.org**.*
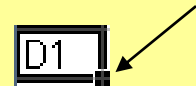
STEP 2: ENTER DETAIL ROWS FOR COLUMNS A-L BEGINNING IN ROW 2 *(see example below)*

- Column A = **D1** (for record type)

- Column B = **Social Security Number without dashes** (can only be used in Pending Admission (PA) files where the applicant is seeking admissions to and intends to enroll in your institution. Do not use SSN for enrolled students [it is a violation of FERPA]).

- Column C = **First Name** of student, applicant, sibling or parent

- Column D = **Middle Initial** of student, applicant, sibling or parent. IMPORTANT: Enter the middle initial only, NOT the full middle name. Do NOT enter a period after the middle initial.

- Column E = **Last Name** of student, applicant, sibling or parent

- Column F = **Name Suffix** of student, applicant, sibling or parent

- Column G = **Date of Birth** (YYYYMMDD format) of student, applicant, sibling or parent

- Column H = **Search Begin Date**[1] (YYYYMMDD format) of student, applicant, sibling, parent or cohort

    - DA (searches for attendance *AFTER* the Search Begin Date)

    - PA (searches for attendance *BEFORE* the Search Begin Date)

    - SB (searches for attendance *AFTER* the Search Begin Date)

    - SE (searches for attendance *AFTER* the Search Begin Date)

    - CO (Searches for cohort retention and completion rates AFTER Search Begin Date; only one date can be used per file)

- Column I = **Blank**

- Column J = your **6-digit school code** (same as school code entered in B1 of the header row, see page 1)

- Column K = your **2-digit branch code** (if you don't know it, enter 00)

- Column L = any **identifier information** you would like included in the response file to aid in your analysis. Use a period to separate multiple identifiers.

> **EXCEL TIP**
>
> **Autofilling Columns**
> To autofill columns with identical information (e.g., "D1" in column A), select the cell and drag the fill handle
>
> D1
>
> down while holding both the left mouse button and Control key down.

> **IMPORTANT**
> Do NOT enter commas in any cell of your request or exceed the maximum column width (noted in red below each screen shot sample).

Record Type 2 characters	SSN	First Name	Middle Initial 1 character	Last Name	Suffix 5 characters	DOB	Search Begin Date[1]	Leave Blank 1 character	School Code	Branch Code 2 characters	Identifier Information (use period as separator)

	A	B	C	D	E	F	G	H	I	J	K	L
2	D1		John	A	Doe	Sr	19861003	20080501		001234	00	Student ID 1
3	D1		Paul	B	Smith		19860801	20080501		001234	00	Student ID 2
4	D1		Mary	C	Gray-Roberts		19870801	20080501		001234	00	Student ID 3
5	D1		Hector	D	Ricardo	III	19870702	20080501		001234	00	Student ID 4
6	D1		Tina	E	Wong		19860302	20080501		001234	00	Student ID 5

Max. column width: PENDING ADMISSIONS ONLY 9 characters   20 characters   20 characters   8 characters   8 characters   6 characters   50 characters (including separator)

[1]Search Begin Date must be earlier than the File Creation Date in column E of Header Row (see page 3).

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STEP 3: ENTER **HEADER** ROW COLUMNS A-G IN ROW 1 *(see example below)*

- Insert a row above the detail records
- Column A = **H1** (for record type)
- Column B = your **6-digit school code** (e.g., 001234)
- Column C = your **2-digit branch code** (if you don't know it, enter 00)
- Column D = your **school name**
- Column E = file creation date in **YYYYMMDD** format (e.g., 20061015).
  The date cannot be in the future.
- Column F = **inquiry type** two-letter code. Enter one of these five codes:
  1. SE (Subsequent Enrollment for Previously Enrolled Students/Transfers Out)
  2. DA (Subsequent Enrollment for Prospective Students/Denied/
     Declined Admissions)
  3. PA (Prior Attendance for Pending Admissions)
  4. SB (Sibling/Parent Enrollment)
  5. CO (Cohort Query)
- Column G = **I** (for entity type, institution of higher education)

Record Type	School Code	Branch Code	School Name	File Creation Date	Inquiry Code	Entity Type
A	B	C	D	E	F	G
H1	001234	00	Hometown University	20080825	CO	I

Max. column width: 2 characters | 6 characters | 2 characters | 40 characters | 8 characters | 2 characters | 1 character

## STEP 4: ENTER **TRAILER** ROW INFORMATION FOR COLUMNS A-B IN LAST ROW *(see example below)*

- Column A = **T1** (for record type)
- Column B = Total number of rows in the spreadsheet, including the Header and Trailer rows

Record Type	Total # Rows						Leave columns C-L blank					
A	B	C	D	E	F	G	H	I	J	K	L	
T1	7											

Max. column width: 2 characters | 8 characters

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STEP 5: SAVE YOUR FILE

- In the File menu on the main toolbar, select "Save As"

- On the "Save As" window, select the drive and/or directory where you would like to save the file

- Enter a file name (your school code should be part of the file name)

- Select "Text (Tab delimited) (*.txt)"

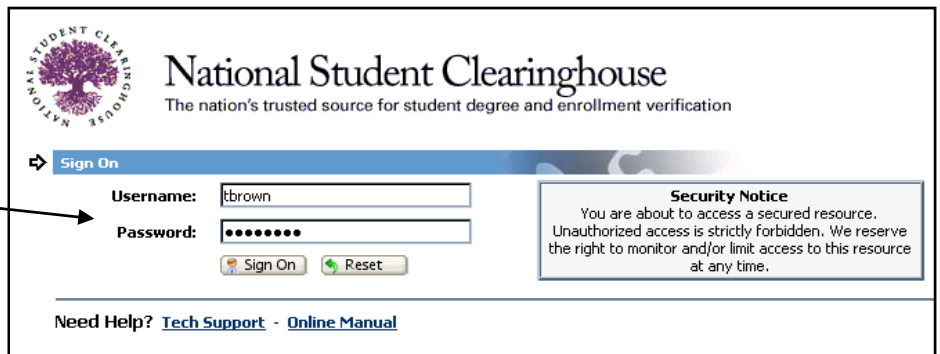- Click "Save." Your file will be saved as a text tab-delimited file in the location you selected.
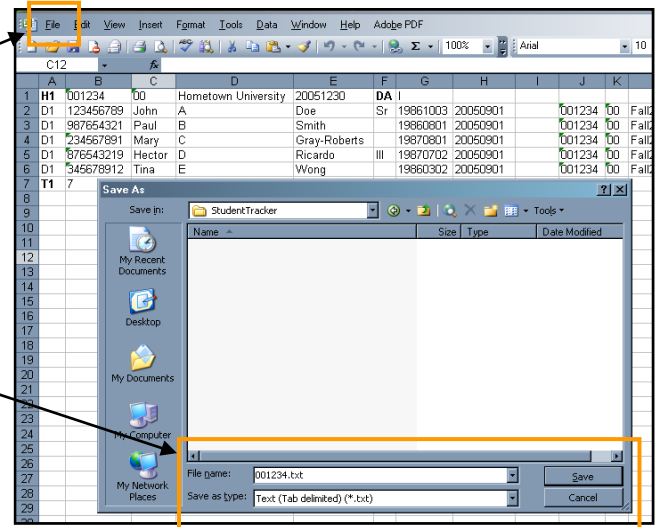
IMPORTANT
Do NOT use these characters in your file name: ! @ # $ % ^ & * ( ) +

You can use underscores.

STEP 6: SUBMIT YOUR FILE

- Go to **https://ftps.nslc.org/** to transmit your file to the Clearinghouse via your Secure FTP account.

If you do not have a Secure FTP account, visit **www.studentclearinghouse.org/ftps/default.htm**. For other media choices, contact studenttracker@studentclearinghouse.org.

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