

# STEP BY STEP GUIDE

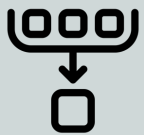
## SDP-PDP Extension

# Using Your PDP Data to Analyze Student Success

# What is the SDP-PDP Extension?



An extension of the **SDP CTE Diagnostic** using the **Postsecondary Data Partnership (PDP) Analysis Ready (AR) Files**



It **simplifies the data preparation process** required for the CTE Diagnostic by leveraging the standardization of the AR files



It **adds new dimensions to the analysis** included in the CTE Diagnostic by looking at student outcomes specific to the AR files

# What's included in this Extension?



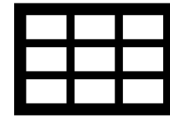
## Detailed Documentation

A README document and this presentation with step by step explanations on how to find and use the PDP AR files, and how to transform them to generate the CTE diagnostic



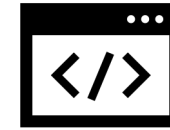
## Code Scripts to Transform Data

Stata .do files for analysts to either run directly or to translate to their programming language of choice, which transform the AR files into relevant data tables for the CTE diagnostic



## Data Entry Templates

Data table templates to enter and label pathway data for students, which is the only piece of student information used in the CTE Diagnostic that is not already included in the AR files



## Code Scripts to Analyze Data

Stata .do files for analysts to either run directly or to translate to their programming language of choice, which use the transformed datasets and generate graphs and analyses



## Example Report

An example report (generated in Markdown and pdf formats) with data visualization and analyses generated with the code files included in this extension

# Contents of this guide

***Part I.*** Reminder : The CTE Diagnostic

***Part II.*** The Postsecondary Data Partnership (PDP) and its Analysis Ready (AR) Files

***Part III.*** Getting Started with this Tool

# Reminder: The CTE Diagnostic

Part I

# What is the CTE Diagnostic?



Goal: To provide both strategic insights as well as guide inquiry to support decision-making by institutional leadership regarding their CTE programming and how to better support students' progression through their chosen pathway



Four sections, ordered to identify challenges and then dig deeper into potential explanations to point institutions to areas of focus and evaluation



Descriptive analyses that can be conducted using institutional or state data

# CTE Diagnostic- Key Guiding Questions



Are pathways supporting students to complete or transfer?



What enrollment choices do students make over time? Might churn between pathways slow students' progress?



Do certain courses impede student progress towards completion/transfer?



Are students able to gain momentum in accumulating credits? If students aren't completing, is it an issue of not attempting or not attaining credits?

# What's included in the Diagnostic?



## Framework for Exploration

Research questions, relevant research, and suggestions for how to use analyses to drive practice



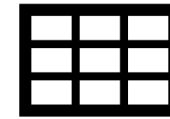
## Example Visuals

Data visualization mock-ups with interpretation keys



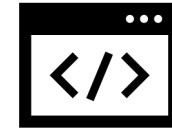
## Analysis Summaries

High-level description of analyses, including purpose and analytic approach



## Data Specifications

Detailed descriptions of the data needed for the analyses, including key variables and data formatting needs



## Code Files

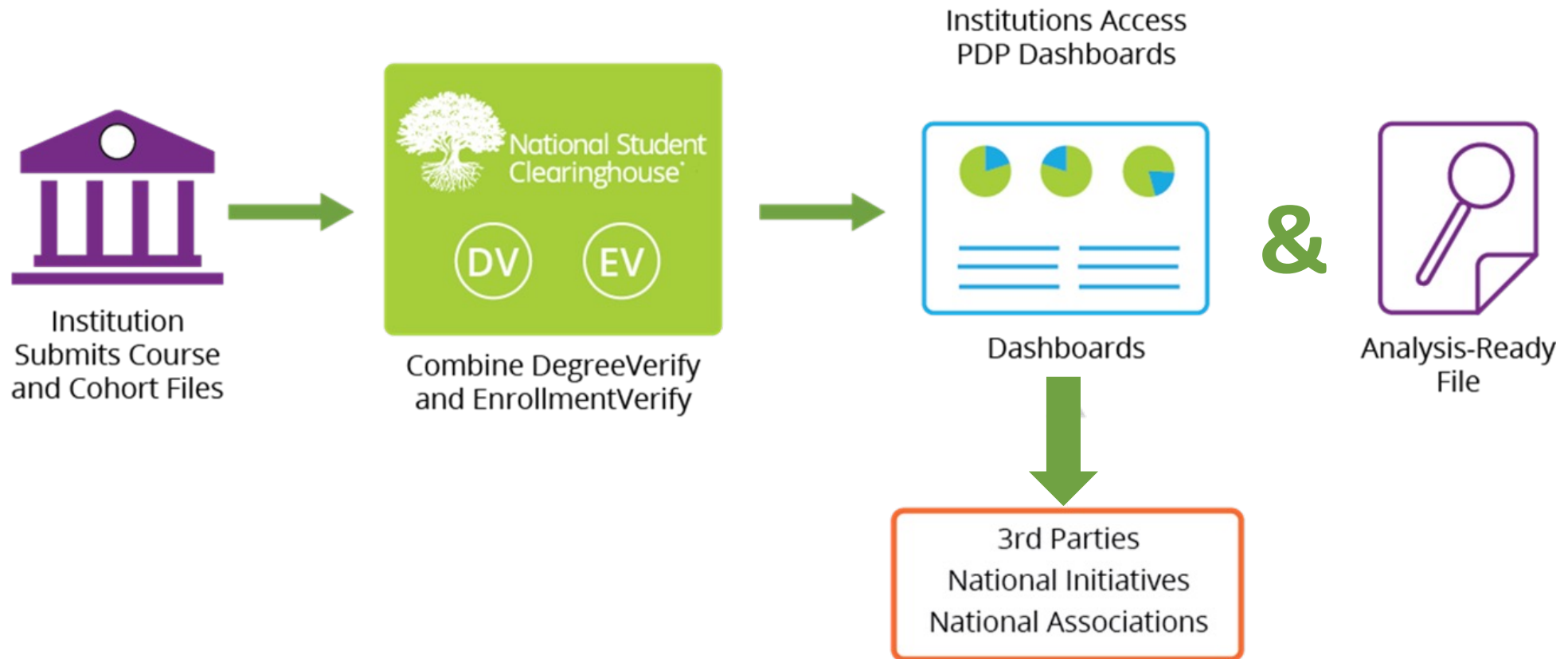
Stata .do files for analysts to either run directly or to translate to their programming language of choice



# The Postsecondary Data Partnership (PDP) and its Analysis Ready (AR) Files

Part II

# What is the Postsecondary Data Partnership? (PDP)



# What is the Analysis Ready File? (A/R file)

- An excel file containing student level data
- The file is created from the course file, cohort file, and other NSC data sources
- There are three analysis ready files- cohort, course, and financial aid
- Cohort level file: One row per student with 50+ columns of data elements and calculated outcomes
- Course level file: One row per student per course with 40 columns of data elements and calculated outcomes
- Financial aid file: Optional, includes information to help calculate unmet need

# Sample Cohort Analysis Ready File

First Name	Middle Name	Last Name	SSN	Date of Birth	Student ID	Institution ID	Cohort	Cohort Term	Student Age	Enrollment Type	Enrollment intensity first term
Hiroko	Randall	Lee	555-55-5555	19910524	555-55-5555	00675000	2015-16	Fall	Older than 24	First-time	Full-time
Hillary	Ocean	Ashley	555-55-5556	19920619	555-55-5556	00675000	2012-13	Winter	20 and younger	Transfer-in	Part-time
Anika	Jayne	Mays	555-55-5557	19930720	555-55-5557	00675000	2013-14	Spring	>20-24	First-time	Full-time
Branden	Wang	Michael	555-55-5558	20100819	555-55-5558	00675000	2016-17	Summer	Older than 24	Transfer-in	Part-time
Emma	Illiana	Strong	555-55-5559	20090615	555-55-5559	00675000	2017-18	Fall	20 and younger	First-time	Full-time
Mark	Gemma	Reilly	555-55-5560	20080612	555-55-5560	00675000	2014-15	Fall	>20-24	Transfer-in	Part-time
Brian	Hunter	Lee	555-55-5561	19910524	555-55-5561	00675000	2015-16	Fall	Older than 24	First-time	Full-time
Derek	Kyra	Coffey	555-55-5562	19920619	555-55-5562	00675000	2012-13	Winter	20 and younger	Transfer-in	Part-time
Nora	Sheila	Mccarthy	555-55-5563	19930720	555-55-5563	00675000	2013-14	Spring	Older than 24	First-time	Full-time
Kelly	Tucker	Flowers	555-55-5564	20100819	555-55-5564	00675000	2016-17	Summer	Older than 24	Transfer-in	Part-time
Cynthia	Luke	Kane	555-55-5565	20090615	555-55-5565	00675000	2017-18	Fall	Older than 24	First-time	Full-time
Quemby	Anastasia	Brady	555-55-5566	20080612	555-55-5566	00675000	2014-15	Fall	20 and younger	Transfer-in	Part-time
Chaim	Kadeem	Pace	555-55-5567	19910524	555-55-5567	00675000	2015-16	Fall	20 and younger	First-time	Full-time
Grady	Cameran	Evans	555-55-5568	19920619	555-55-5568	00675000	2012-13	Fall	Older than 24	Transfer-in	Part-time
Colin	Hedy	Santiago	555-55-5569	19930720	555-55-5569	00675000	2013-14	Fall	Older than 24	First-time	Full-time
Christen	Maris	Perry	555-55-5570	20100819	555-55-5570	00675000	2016-17	Fall	20 and younger	Transfer-in	Part-time
Brody	Kelly	Mayer	555-55-5571	20090615	555-55-5571	00675000	2017-18	Fall	20 and younger	First-time	Full-time
Alvin	Lilah	Emerson	555-55-5572	20080612	555-55-5572	00675000	2014-15	Fall	20 and younger	Transfer-in	Part-time
Pamela	Callie	Valencia	555-55-5573	19910524	555-55-5573	00675000	2015-16	Fall	>20-24	First-time	Full-time
Colorado	Sylvester	Joyner	555-55-5574	19920619	555-55-5574	00675000	2012-13	Fall	>20-24	Transfer-in	Part-time
Elmo	Henry	Marsh	555-55-5575	19930720	555-55-5575	00675000	2013-14	Fall	>20-24	First-time	Full-time
Sophia	Simon	Ellison	555-55-5576	20100819	555-55-5576	00675000	2016-17	Fall	Older than 24	Transfer-in	Part-time
Myra	Meredith	Dotson	555-55-5577	20090615	555-55-5577	00675000	2017-18	Fall	Older than 24	First-time	Full-time
Margaret	Xenos	Ramsey	555-55-5578	20080612	555-55-5578	00675000	2014-15	Fall	>20-24	Transfer-in	Part-time
Abdul	Len	Ball	555-55-5579	20100819	555-55-5579	00675000	2015-16	Fall	Older than 24	First-time	Full-time
India	Moses	Puckett	555-55-5580	20090615	555-55-5580	00675000	2012-13	Fall	Older than 24	Transfer-in	Part-time
Leonard	Stella	Conley	555-55-5581	20080612	555-55-5581	00675000	2013-14	Winter	20 and younger	First-time	Full-time
Clinton	Madeson	Bond	555-55-5582	19910524	555-55-5582	00675000	2016-17	Spring	20 and younger	Transfer-in	Part-time

MOCK DATA

# What kind of elements & outcomes are in the file?

## ➤ Student Demographic & Academic Information

Name, DOB, Student ID/SSN, Cohort information, Race, Ethnicity, Gender, First Gen status, Pell Status First Year, Enrollment information

## ➤ Student Progression (“Early Momentum”)

GPA, number of attempted and completed credits, Gateway and dev ed information (placement, attempted/completed), retention/persistence

## ➤ Long Term Outcomes

Year earned bachelor, associates, or certificate (at your institution or another), year of last enrollment, time to credential, transfer information

# How can I access my analysis ready files?

- Identify your PDP user administrator on campus
- Campus user administrator can scan the QR code or go to the link below for instructions on accessing the file
- If you are still having trouble email [pdpSERVICE@nationalstudentclearinghouse.com](mailto:pdpSERVICE@nationalstudentclearinghouse.com)
- <https://tinyurl.com/ARFILEPLEASE>



# How can I use the analysis ready files?

- Create cohorts to help answer questions unique to your campus
- Identify opportunities for immediate intervention
- Analyze past trends
- Merge/append other datasets
- Link with your Tableau Dashboards for deeper insights
- **...with this new tool!**



# Getting Started with this Tool

Part III



# How does the PDP Extension work ?

1. **Download the PDP Extension folder** to your computer and save it locally
2. **Read the README file**
3. **Add your PDP Analysis Ready Files** to your local folder (in the subfolder 1\_data-pdp)
4. **Add student pathway information** to your local folder (in the subfolder 2\_data-toolkit)
5. **Define the parameters and options** for your analysis
6. **Run the data transformation .do files** to transform your data into the appropriate data frame
7. **Run the analytical .do files** to generate graphs, tables and analyses to put into a report

# How to access the PDP Extension ?

- Open any web browser and go to <https://github.com/BeaLeydier/researched-pdp-toolkit>
- This takes you to the **github repository** (or **repo**) where the **tool** is stored
- What is **github**?
  - Github is a website that makes code sharing easy, and where a lot of projects that use code (no matter the language : Stata, R, Python, JavaScript, etc.) are shared publicly
- What is a **repo**?
  - A repo or repository is the name used on github to call a project
- What is a **tool** or **toolkit**?
  - A tool or toolkit can take many forms, but in this case it takes the form of a series of code scripts that you can download and run with your own data to generate analyses of interest
  - For this toolkit, all the scripts are in Stata, and we refer to them as scripts or .do files interchangeably
  - The toolkit also contains a README document, which is a document that you have to read (like its name suggest) when you first use the toolkit, as well as an example Report document that showcases the type of analyses produced by this toolkit

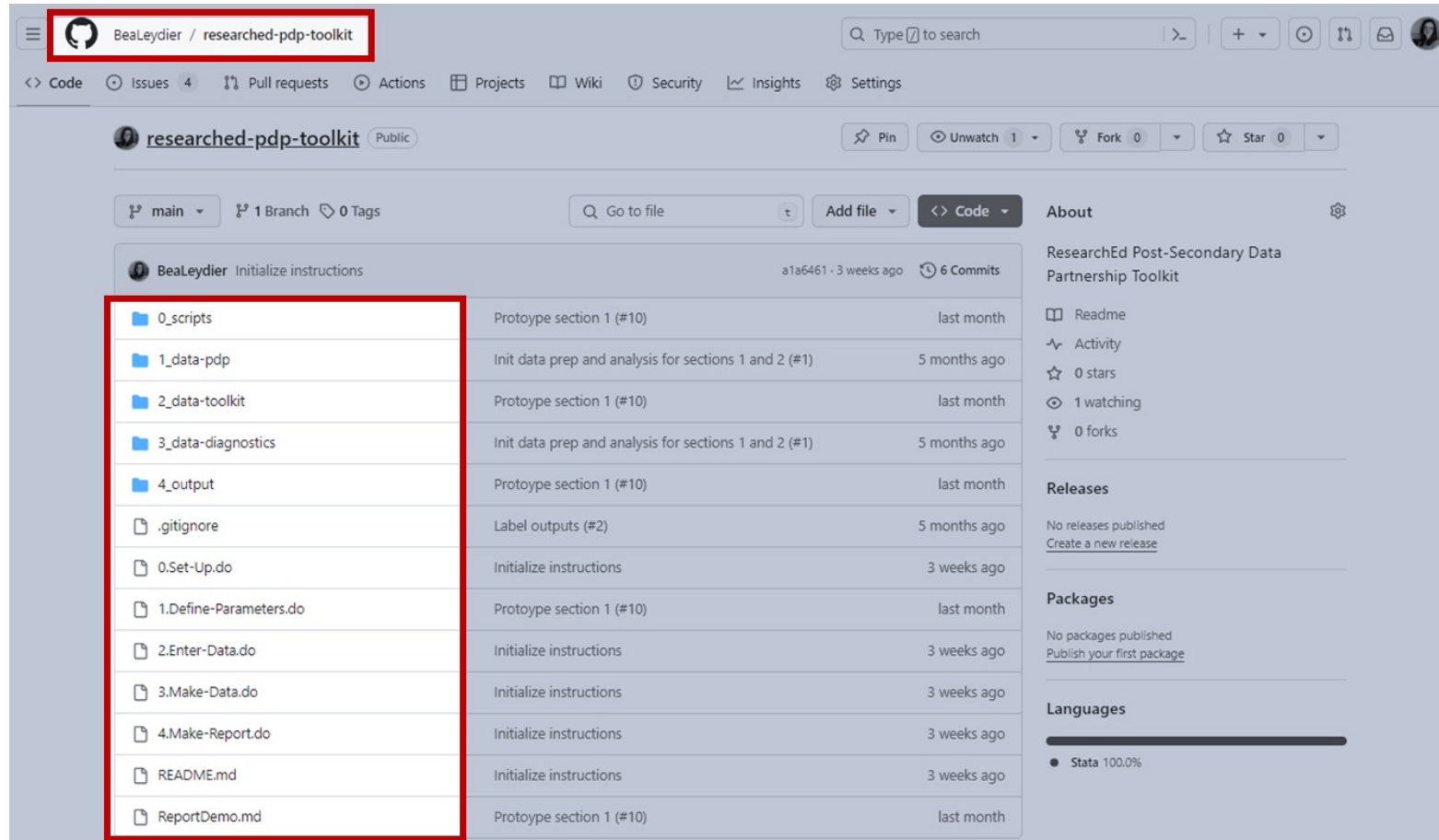
# What am I looking at ?

The screenshot shows a GitHub repository page for 'researched-pdp-toolkit' by user 'Bealeydiier'. The repository is public and has 4 issues, 0 pull requests, 0 actions, 0 projects, 0 wiki pages, 0 security issues, 0 insights, and 0 settings. It has 0 stars, 0 forks, and 1 watch. The repository is on the 'main' branch with 1 branch and 0 tags. The file list includes:

File	Description	Last Commit
0_scripts	Prototype section 1 (#10)	last month
1_data-pdp	Init data prep and analysis for sections 1 and 2 (#1)	5 months ago
2_data-toolkit	Prototype section 1 (#10)	last month
3_data-diagnostics	Init data prep and analysis for sections 1 and 2 (#1)	5 months ago
4_output	Prototype section 1 (#10)	last month
.gitignore	Label outputs (#2)	5 months ago
0.Set-Up.do	Initialize instructions	3 weeks ago
1.Define-Parameters.do	Prototype section 1 (#10)	last month
2.Enter-Data.do	Initialize instructions	3 weeks ago
3.Make-Data.do	Initialize instructions	3 weeks ago
4.Make-Report.do	Initialize instructions	3 weeks ago
README.md	Initialize instructions	3 weeks ago
ReportDemo.md	Prototype section 1 (#10)	last month

The right sidebar shows the repository's 'About' section, which includes a README, activity, 0 stars, 1 watching, and 0 forks. It also shows 'Releases' (no releases published) and 'Packages' (no packages published). The 'Languages' section shows Stata at 100.0%.

# You have landed at the root of the repository, which contains files. Ignore everything else!



Bealeydiier / researched-pdp-toolkit

researched-pdp-toolkit Public

main 1 Branch 0 Tags

Go to file Add file <> Code

Bealeydiier Initialize instructions a1a6461 · 3 weeks ago 6 Commits

File	Commit Message	Commit Date
0_scripts	Prototype section 1 (#10)	last month
1_data-pdp	Init data prep and analysis for sections 1 and 2 (#1)	5 months ago
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About ResearchEd Post-Secondary Data Partnership Toolkit

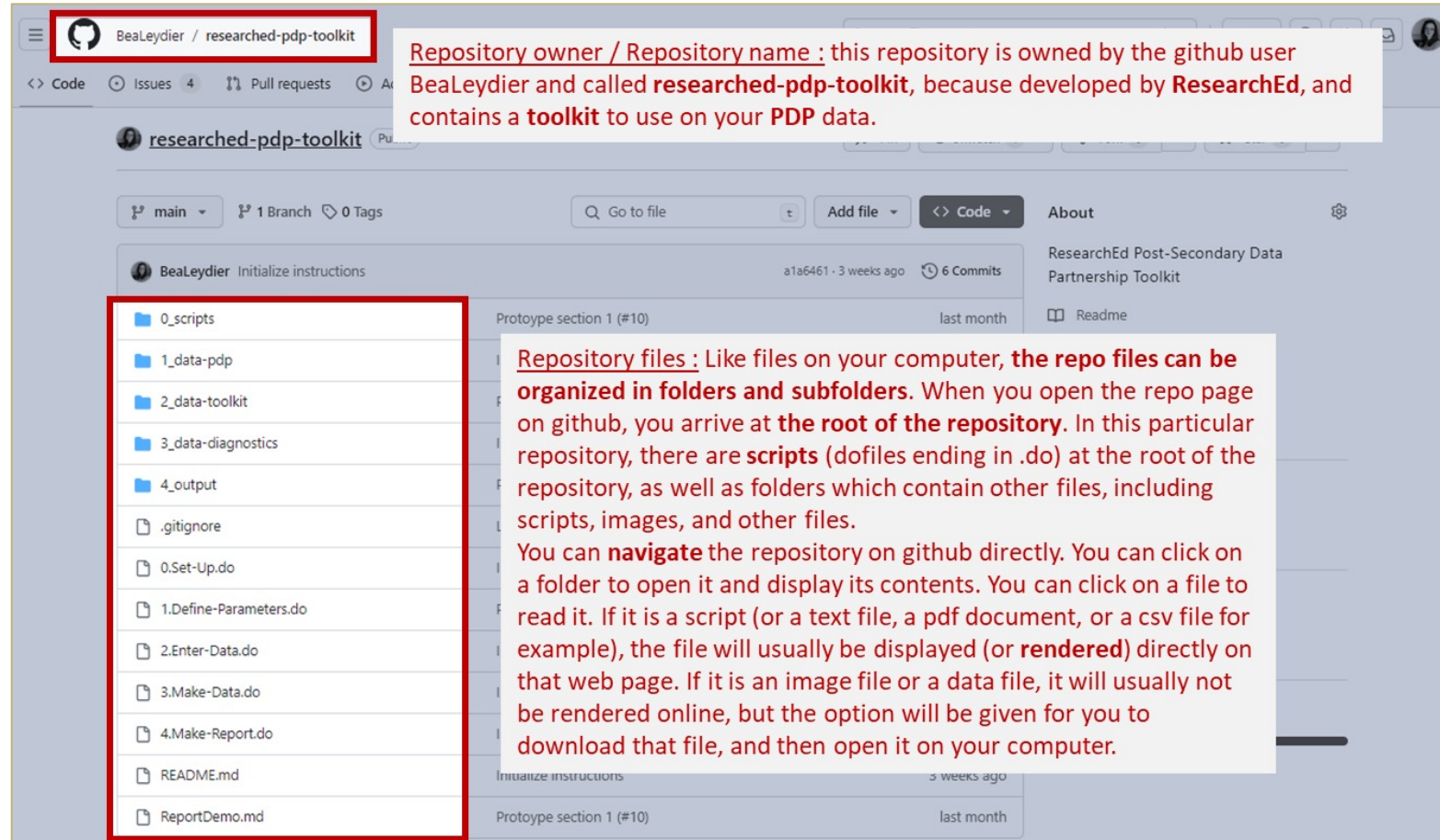
Readme Activity 0 stars 1 watching 0 forks

Releases No releases published Create a new release

Packages No packages published Publish your first package

Languages Stata 100.0%

# You have landed at the root of the repository, which contains files. Ignore everything else!



Repository owner / Repository name : this repository is owned by the github user BealeyDier and called **researched-pdp-toolkit**, because developed by **ResearchEd**, and contains a **toolkit** to use on your **PDP** data.

**Repository files :** Like files on your computer, **the repo files can be organized in folders and subfolders**. When you open the repo page on github, you arrive at **the root of the repository**. In this particular repository, there are **scripts** (dofiles ending in .do) at the root of the repository, as well as folders which contain other files, including scripts, images, and other files.

You can **navigate** the repository on github directly. You can click on a folder to open it and display its contents. You can click on a file to read it. If it is a script (or a text file, a pdf document, or a csv file for example), the file will usually be displayed (or **rendered**) directly on that web page. If it is an image file or a data file, it will usually not be rendered online, but the option will be given for you to download that file, and then open it on your computer.

- 0\_scripts
- 1\_data-pdp
- 2\_data-toolkit
- 3\_data-diagnostics
- 4\_output
- .gitignore
- 0.Set-Up.do
- 1.Define-Parameters.do
- 2.Enter-Data.do
- 3.Make-Data.do
- 4.Make-Report.do
- README.md
- ReportDemo.md

Ok, there are a few more things you can look at on the repo landing page.

**About:** tells you what the repo is about! (unsurprisingly)

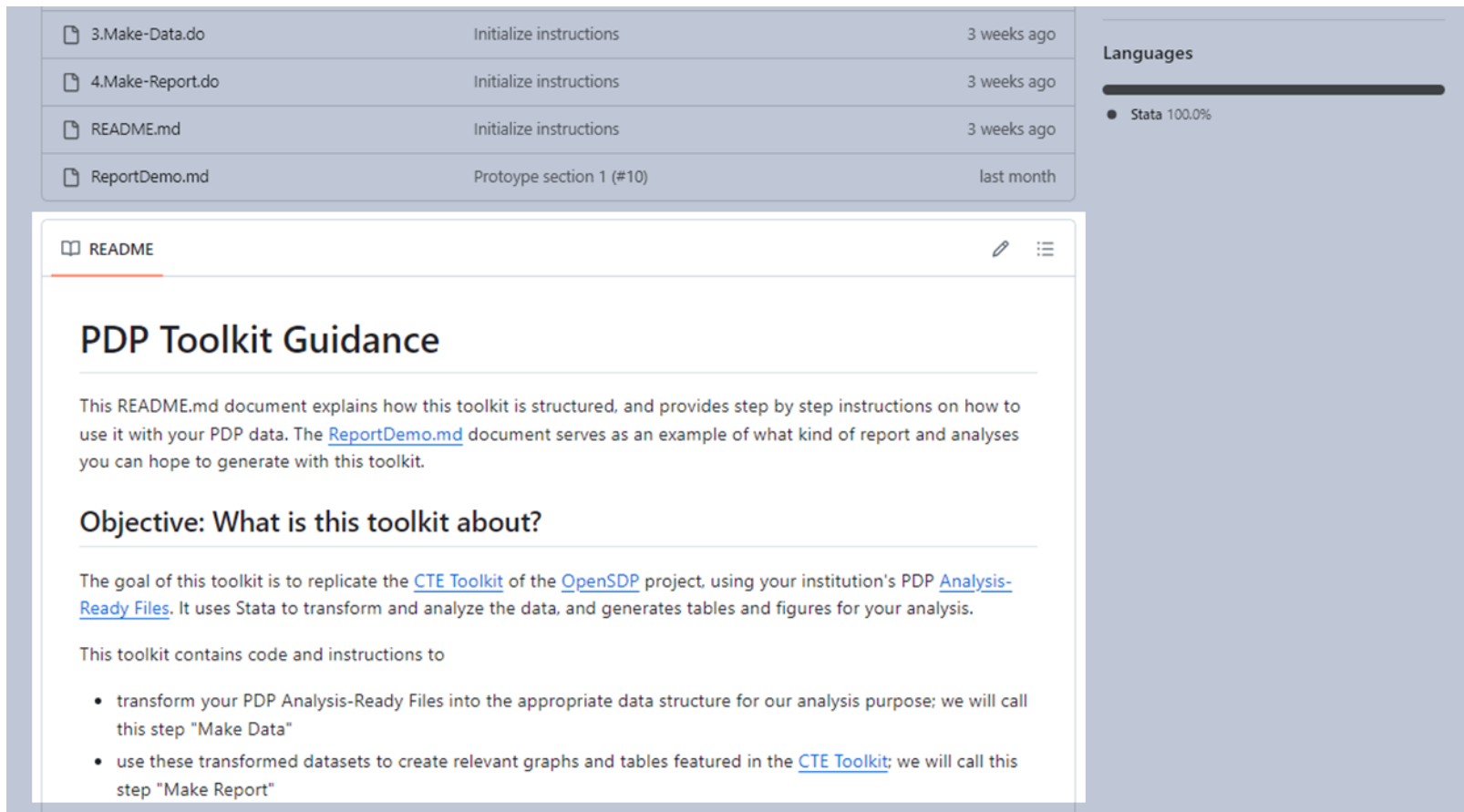
**About**  
ResearchEd Post-Secondary Data Partnership Toolkit

**Languages:** tells you what languages are used in the repo, taking into account all the script files of the repo. This repository is 100% Stata.

**Languages**  
Stata 100.0%



On most github repos, there will be a README document that is rendered automatically at the root of the repo, and displayed on the repo landing page on github. You can scroll down and know what the repo is about from the README.



The screenshot displays a GitHub repository interface. At the top, a file list shows four items: '3.Make-Data.do', '4.Make-Report.do', 'README.md', and 'ReportDemo.md'. Each item includes a file icon, the filename, a description ('Initialize instructions' for the .do files and 'Prototype section 1 (#10)' for the .md files), and the last commit time ('3 weeks ago' for the first three and 'last month' for the last). Below the file list, the 'README' tab is selected, showing the rendered content. The README is titled 'PDP Toolkit Guidance' and contains a paragraph explaining the document's purpose, a section titled 'Objective: What is this toolkit about?', and a bulleted list of two steps: 'transform your PDP Analysis-Ready Files into the appropriate data structure for our analysis purpose' and 'use these transformed datasets to create relevant graphs and tables'. To the right of the README content, a 'Languages' section shows a bar chart with 'Stata' at 100.0%.

File Name	Description	Last Commit
3.Make-Data.do	Initialize instructions	3 weeks ago
4.Make-Report.do	Initialize instructions	3 weeks ago
README.md	Initialize instructions	3 weeks ago
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## PDP Toolkit Guidance

This README.md document explains how this toolkit is structured, and provides step by step instructions on how to use it with your PDP data. The [ReportDemo.md](#) document serves as an example of what kind of report and analyses you can hope to generate with this toolkit.

### Objective: What is this toolkit about?

The goal of this toolkit is to replicate the [CTE Toolkit](#) of the [OpenSDP](#) project, using your institution's PDP [Analysis-Ready Files](#). It uses Stata to transform and analyze the data, and generates tables and figures for your analysis.

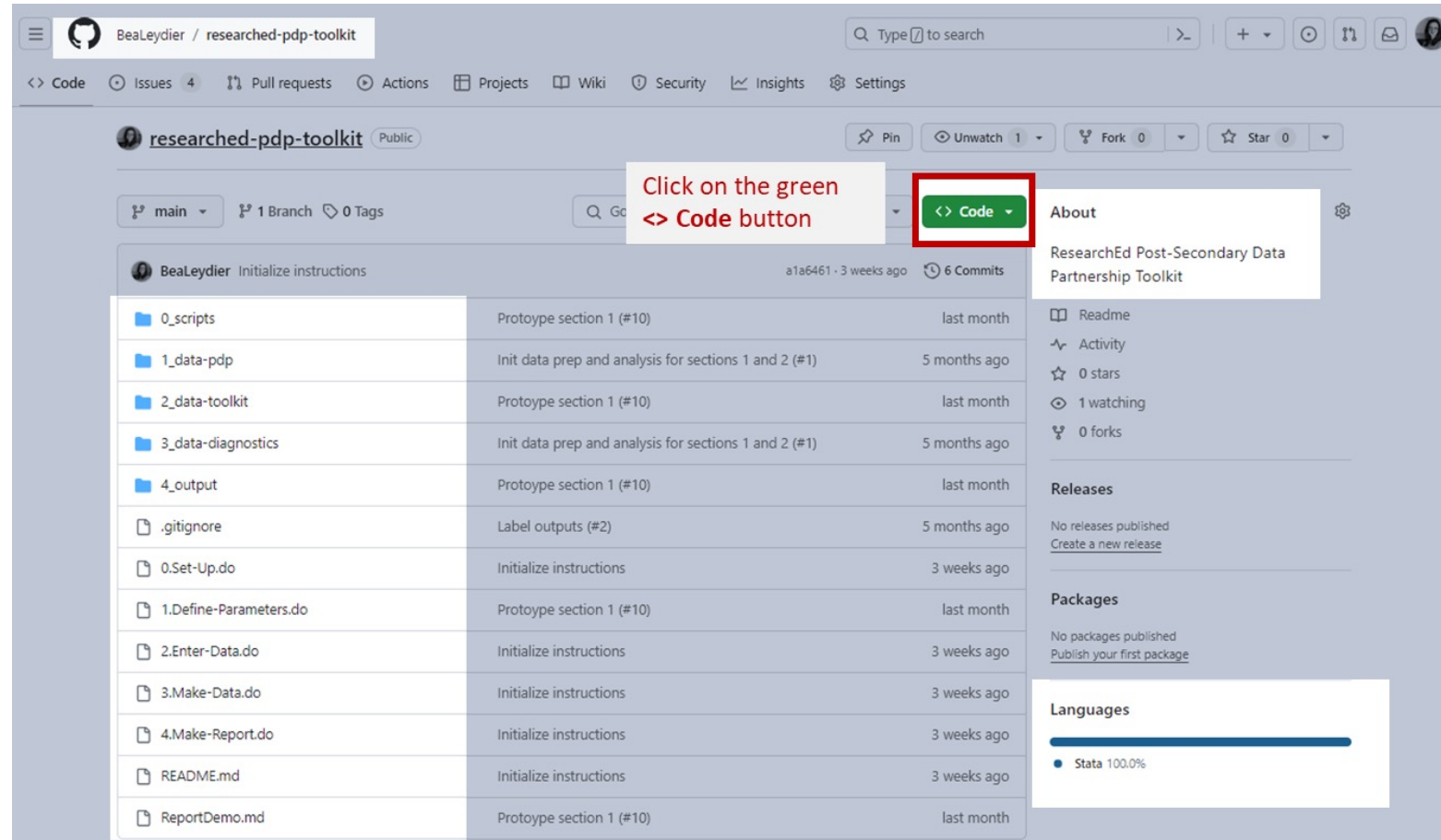
This toolkit contains code and instructions to

- transform your PDP Analysis-Ready Files into the appropriate data structure for our analysis purpose; we will call this step "Make Data"
- use these transformed datasets to create relevant graphs and tables featured in the [CTE Toolkit](#); we will call this step "Make Report"

**Languages**

- Stata 100.0%

# How to get these files on your computer?



The screenshot shows the GitHub repository page for 'researched-pdp-toolkit' by Bealeydiery. The repository is public and has 1 branch and 0 tags. The file list includes:

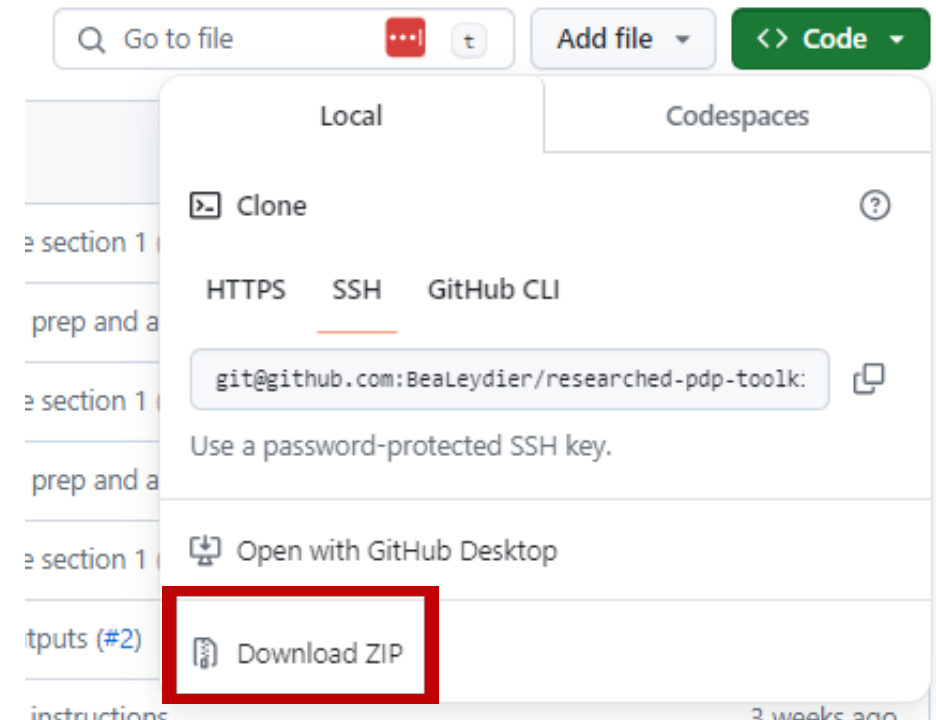
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The right sidebar shows repository statistics: 0 stars, 1 watching, 0 forks. It also includes sections for Releases, Packages, and Languages (Stata 100.0%).



# Option 1 : Download

- From the Code Button, Select **Download ZIP**
- You will download the files onto your computer, and then never have to visit github ever again
- You will have used github like a cloud you download files from



# Option 1 will download a .zip file in your chosen location on your own computer

- A .zip file is a compressed folder
  - It is a folder, meaning that it is an object on your computer that contains other files and subfolders
  - It is compressed, meaning that it takes less space on your computer
- You need to unzip or extract or uncompress it
  - Copy, Right click and Extract..., Un-Zip
  - WikiHow based on your OS: <https://www.wikihow.com/Open-a-Zip-File>
- This creates a regular folder on your computer
  - That folder is now your toolkit! It contains all the files you saw on the github page, with the same folder structure (some scripts at the root, some subfolders and files in them)

# Option 2 : Fork and Clone

- This is only if you already know github and want to keep using github to work on this project
  - Fork the repo so you have writing access
  - Clone it on your local machine – remember, not in a cloud synced folder
  - Note : .gitignore
    - The repository contains a gitignore that is set to ignore every data file like the AR file you will add to the toolkit
    - This ensures privacy of your data even if you use github to collaborate on the toolkit
    - Data files are always local, never tracked with git, and never pushed to github

# Who should have access to the toolkit files?

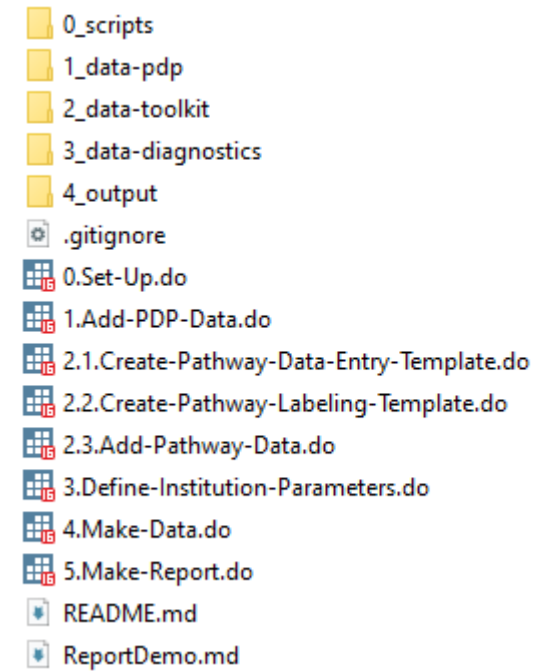
- Anyone who wants to work with your PDP AR data using this toolkit
- Inside the toolkit folder, you will add your PDP Analysis Ready files
  - Make sure your toolkit folder isn't saved somewhere your PDP AR files shouldn't be
- How to work and collaborate on the toolkit
  - **Each person who works on the toolkit can download the files from github to their own machine**, copy the AR files in the dedicated toolkit subfolder (1\_data-pdp) and run the toolkit this way
  - Or : You can use a cloud system (Google Drive, Box, Dropbox, OneDrive, etc) to have one toolkit folder on your cloud shared with everyone who will work on the toolkit
    - One person downloads the files from github, saves them in your cloud system, adds the AR files to the dedicated toolkit subfolder (1\_data-pdp) and shares the cloud folder with relevant colleagues
  - Or : you can use the forked github repo and collaborate on it
    - Each person cloning the repo will need to also add the AR files locally
    - The gitignore ensures that the AR files are never uploaded onto github
    - For example, if you use an online cloud system for your files, you shouldn't save your toolkit folder inside a shared folder that is also shared with people who can't access the PDP AR files

# Will my PDP AR files be shared with anyone if I use this toolkit?

- Short answer : **No**
- Whether you download or clone the toolkit from github, the toolkit code **runs locally** on your own machine, and none of the contents of the 1\_data-pdp, 2\_data-toolkit and 3\_data-diagnostic subfolders are shared with anyone or anything
  - Even if you clone the repo and work on it with github, the contents of these folders are not tracked by git and not pushed to github (thanks to the .gitignore)
- For the toolkit to run, **you need to copy your AR files in the 1\_data-pdp subfolder** of the toolkit on your machine, wherever you saved your toolkit
  - The toolkit itself doesn't read any file outside of what's in the toolkit folder
  - The toolkit doesn't share any file that is under the **1\_data-pdp, 2\_data-toolkit** and **3\_data-diagnostic** subfolders of the toolkit
  - It is important for you to save the toolkit in a location where it is safe to add the AR files (e.g. not on a public cloud folder)

# From here onward, follow the README

- The README takes you step by step to everything you need to do to set up the toolkit, get the data ready and run the analyses
  - Set up Stata
  - Add your PDP AR files
  - Add your pathway data
  - Set parameters
  - Adapt and run scripts for data transformation
  - Adapt and run scripts for data analysis



A file explorer view showing the project directory structure. It includes folders for scripts, data, and output, as well as a list of Stata do-files and README files.

- 0\_scripts
- 1\_data-pdp
- 2\_data-toolkit
- 3\_data-diagnostics
- 4\_output
- .gitignore
- 0.Set-Up.do
- 1.Add-PDP-Data.do
- 2.1.Create-Pathway-Data-Entry-Template.do
- 2.2.Create-Pathway-Labeling-Template.do
- 2.3.Add-Pathway-Data.do
- 3.Define-Institution-Parameters.do
- 4.Make-Data.do
- 5.Make-Report.do
- README.md
- ReportDemo.md

# How do I change my filepath?

```
* =====  
* PART 1. - File path  
* =====  
  
* Stata set up  
set more off  
  
* INSTRUCTIONS: Define machine-specific file path  
  
if c(username)=="bl517" {  
    global root "C:/Users/bl517/Documents/Github/researched-pdp-toolkit"  
}  
else if c(username)=="INSERT-MACHINE-USERNAME" {  
    global root "INSERT MACHINE-SPECIFIC FILEPATH"  
}  
else {  
    di as err "Please enter machine-specific path information"  
    exit  
}
```

# How do I add my PDP data?

```
1. Add-PDP-Data.do x
1
2  /*****
3
4      ADD PDP DATA
5
6  *****/
7
8  * =====
9  * PART 1. - Add your PDP Analysis Ready Files to the 1_data-pdp subolder
10 * =====
11
12  /* INSTRUCTIONS:
13      Find your PDP Analysis Ready Files, copy and save them under
14      the 1_data-pdp subfolder of this toolkit.
15
16      For this toolkit, we are only using the AR Cohort file and the AR
17      Course file, so you only need to copy these two in that folder.
18  */
19
20 * =====
21 * PART 2. - Add the AR File Names
22 * =====
23
24  /* INSTRUCTIONS:
25      Replace the file names in quotes with the names of the PDP Analysis
26      Ready files you just saved under 1_data-pdp.
27
28      Do NOT change the names of the globals (arcohortfile and arcoursefile).
29
30      Globals in Stata allow you to store once something that the code refers
31      to frequently. The global works as a placeholder in the rest of the code.
32      In this case, we are using the global arcohortfile to refer to your
33      AR Cohort File, and the global arcoursefile to refer to your AR Course
34      File. In the toolkit code, everytime we are calling one of these files,
35      we are calling the corresponding global name (preceded by $), and Stata
36      will automatically replace it with the name you defined here. This
37      avoids you having to change the filename in every line of code where
38      the file is being opened or referenced. You only have to change
39      it once here, and everywhere else in the code, these files are
40      referred to from the name of the globals directly.
41  */
42
43  * Name of your PDP AR files (including the file extension)
44  global arcohortfile "add-your-file-name-here.xlsx"
45  global arcoursefile "add-your-file-name-here.csv"
46
```



# How do I add my student pathway data?

StudentID	FirstName	MiddleName	LastName	Cohort	CohortTerm	AcademicYear	ProgramofStudyYear_input
12345678	Hiroko	Rendall	Lee	2013-14	SPRING	2013-14	
12345678	Hiroko	Rendall	Lee	2013-14	SPRING	2014-15	
12345678	Hiroko	Rendall	Lee	2013-14	SPRING	2015-16	
12345678	Hiroko	Rendall	Lee	2013-14	SPRING	2016-17	
14448096	Hillary	Ocean	Ashley	2015-16	FALL	2015-16	
14448096	Hillary	Ocean	Ashley	2015-16	FALL	2016-17	
14448096	Hillary	Ocean	Ashley	2015-16	FALL	2017-18	
14891478	Derek	Kyra	Coffey	2018-19	SPRING	2018-19	
14891478	Derek	Kyra	Coffey	2018-19	SPRING	2019-20	

ProgramofStudy_ID	ProgramofStudy	ProgramofStudy_Label
1	230101	Engineer Tech
2	234501	Health
3	261504	IT Tech
4	321624	Mech Repair
5	422814	
6	513801	
7	513899	
8	540101	

# How do I define my institution's parameters?

```
3.Define-Institution-Paramete... X
1
2  /******
3
4      PARAMETERS
5
6      This is where you define the parameters for your analysis, like whether
7      you are a 2-year or 4-year college.
8
9  *****/
10
11  *  =====
12  *  PART 1. - Institution Type
13  *  =====
14
15  /* INSTRUCTIONS:
16      Comment out the institution type that you are NOT, by placing an
17      asterix in front of it.
18  */
19
20  global institutiontype "2year"
21  *global institutiontype "4year"
22
23
```