

CSV File Submission

This document explains how to prepare flat files by converting Excel files to comma separated values (CSV) files and how to import CSV files into Excel files.

How to Convert Excel Files into CSV Files

Please note that these instructions were written for Excel 2007 or later. For those local educational agencies (LEAs) using older versions of Excel, please contact the CRDC Partner Support Center.

If an LEA's data are in Excel, then the data will need to be changed to CSV, the only format the web-based data collection submission system understands. CSV files can contain large amounts of data while maintaining a small file size.

Transforming an Excel file to a CSV file is easy. The file will NOT upload properly if the steps are not followed exactly.



TIP: Save time resolving errors by double checking that the first data element ID is either the SCH_ID or LEA_ID.

Other Helpful TA Documents

Pre-Collection

- [Flat File Specifications](#)
This spreadsheet contains the data elements collected in the CRDC.
- [Excel Template Instructions](#)
These instructions illustrate the process for entering the data into the templates and saving the data in the required flat file format.
- [CRDC List of Data Elements](#)

Submission

- [Flat File Instructions](#)
 - Instructions for using the CRDC Flat File Submission Method
 - Error Checks and Validation
- [Using the Error Resolution Report](#)
- [Skipped Field Warnings](#)

Contact Support

Partner Support Center
Phone: (855) 255-6901
Email: [PSC Contact Us](#)

Step 1

Click the Excel tab with the CRDC data. If using the CRDC Excel template, then this is the **Consolidated** tab.

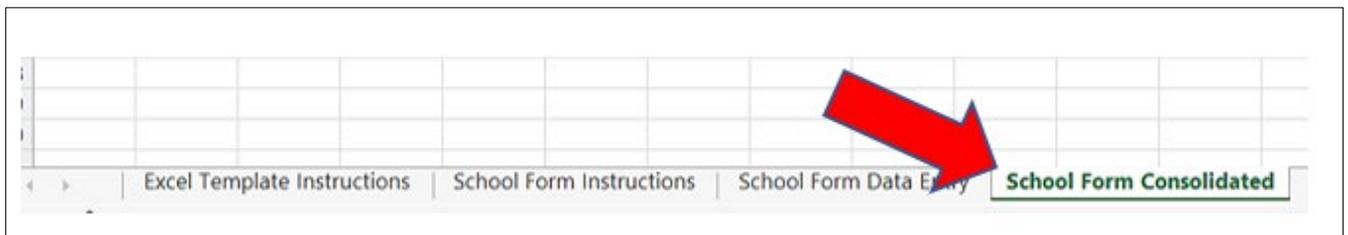


Figure 1. Four tabs in the CRDC School Form Excel Template

Step 2

Click the **File** tab on the top Ribbon Bar.

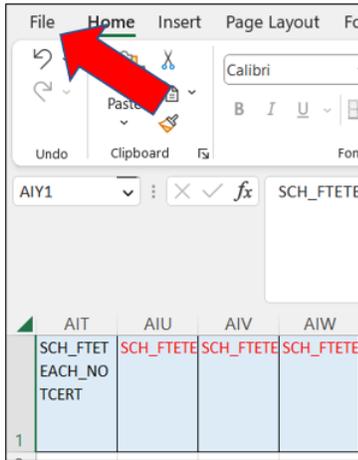


Figure 2. Excel Template, FILE highlighted

Step 3

Click the **Save As** menu option on the left.

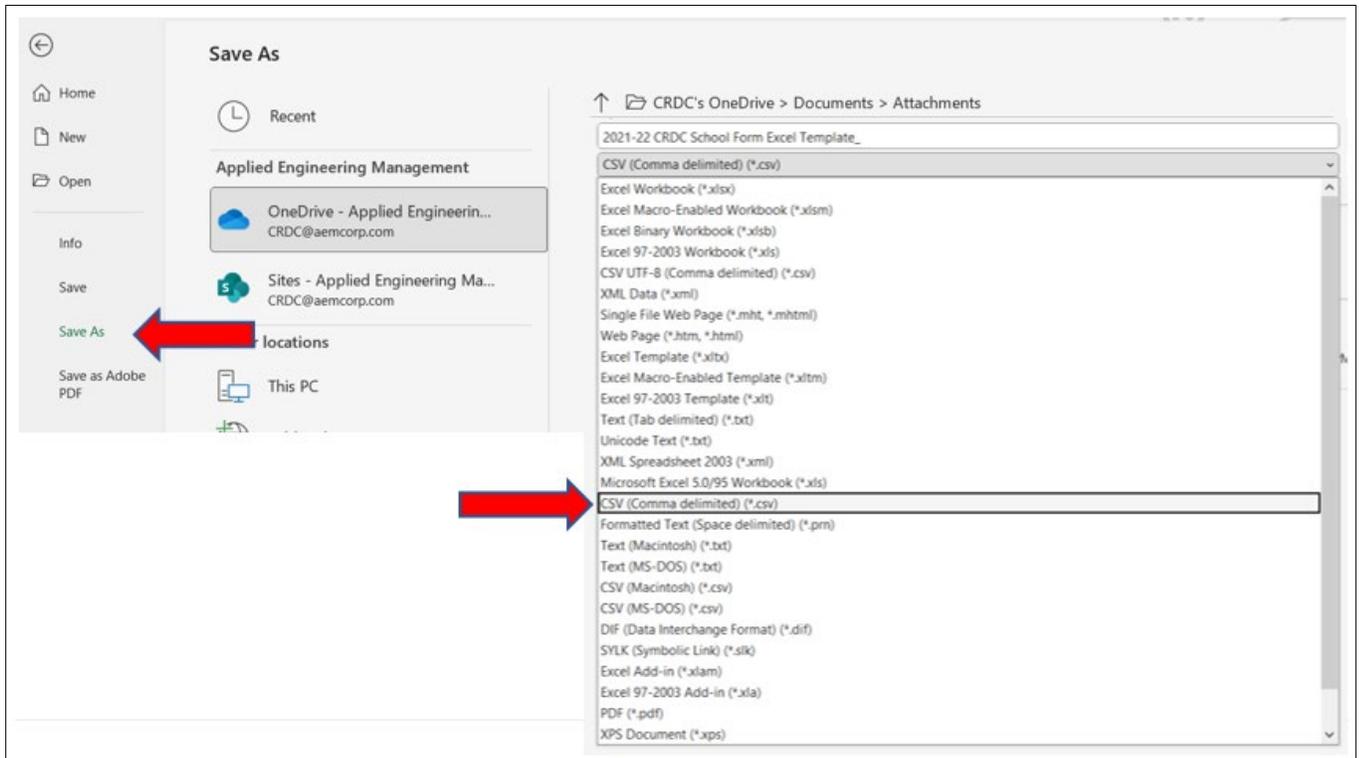


Figure 3. When saving, use SAVE AS

Step 4

Once the new window appears, pick the destination of where to save the file, and name the file.

Before clicking the **Save** button, click on the **Save as Type** dropdown menu, under the File Name field. Be sure to select **CSV (Comma delimited)** (see Figure 3 above).

Step 5

Click the **Save** button.

Step 6

Two dialog boxes will appear in sequence. These are non-critical notifications that the properties of the file will be changed as the file is changed from an .xlsx file to a .csv file. This is OK! Click **OK** and **Yes** on these dialog boxes (see Figures 4 and 5).

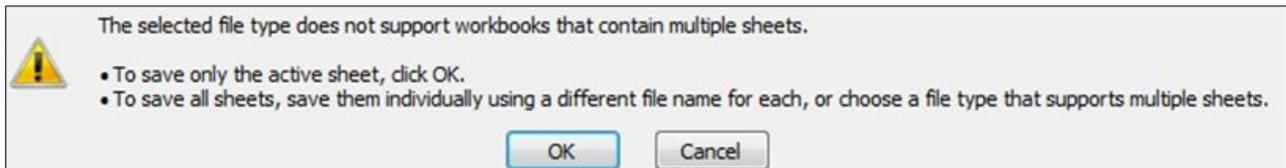


Figure 4. Dialog box 1 - The properties of the documents will be changed

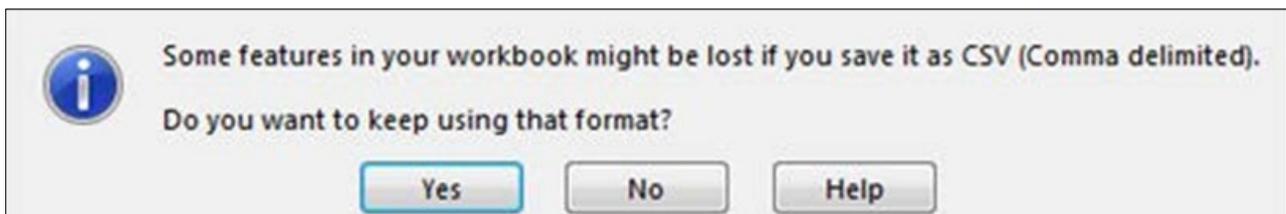


Figure 5. Dialog box 2 - Some features of the document might be lost

Congratulations!!—Your file has now been saved properly.

How to Import CSV Files into Excel Files

Please note that these instructions were written for Excel 2007 or later. For those local educational agencies (LEAs) using older versions of Excel, please contact the CRDC Partner Support Center.

If your LEA has a CSV file and you need to make changes or open the file in Excel, then follow the steps below to import the data. This ensures that leading zeros will not be dropped and all the formatting necessary to upload your CSV file will be preserved.

Step 1

Open a new blank Excel File and click on the **Data** tab to import a text file. Click on **From Text/CSV**.

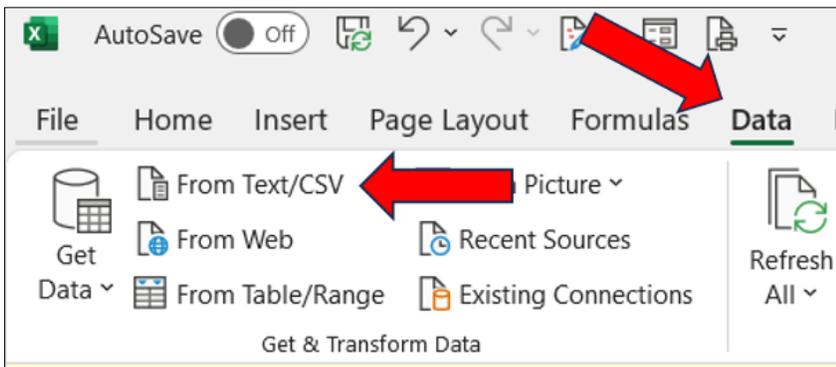


Figure 6. Blank Excel with From Text highlighted

Step 2

After clicking on **From Text/CSV**, import the CSV file and select your CRDC CSV file.

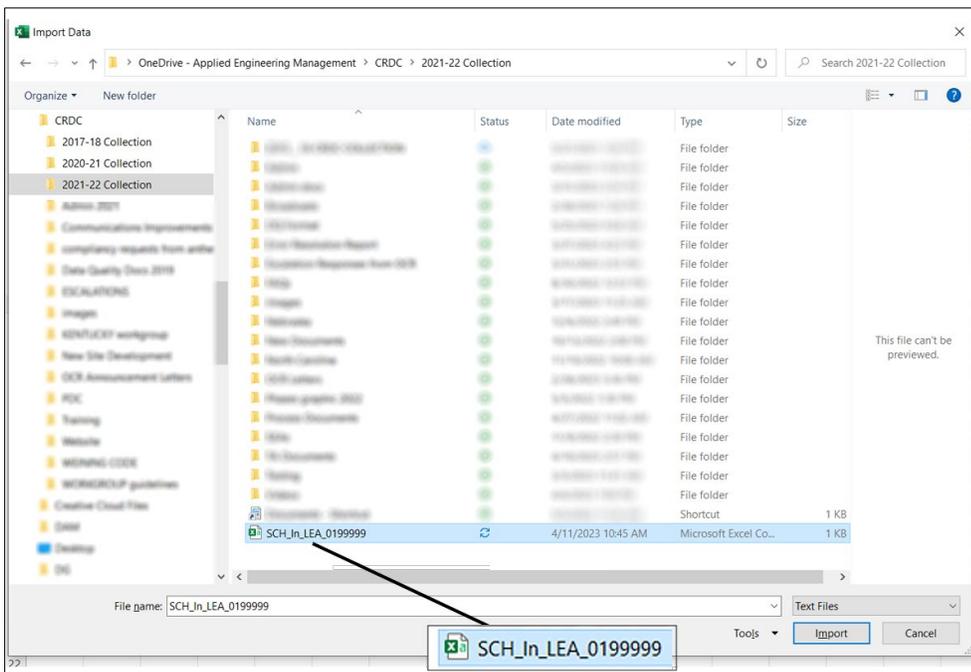


Figure 7. Importing CSV file from file listing

Step 3

Then click the **Import** button next to the file name. This will open Excel’s Text Import Wizard. In Step 1 of the Wizard, select **Delimited**. This lets Excel understand that the file you are importing is separated by commas.

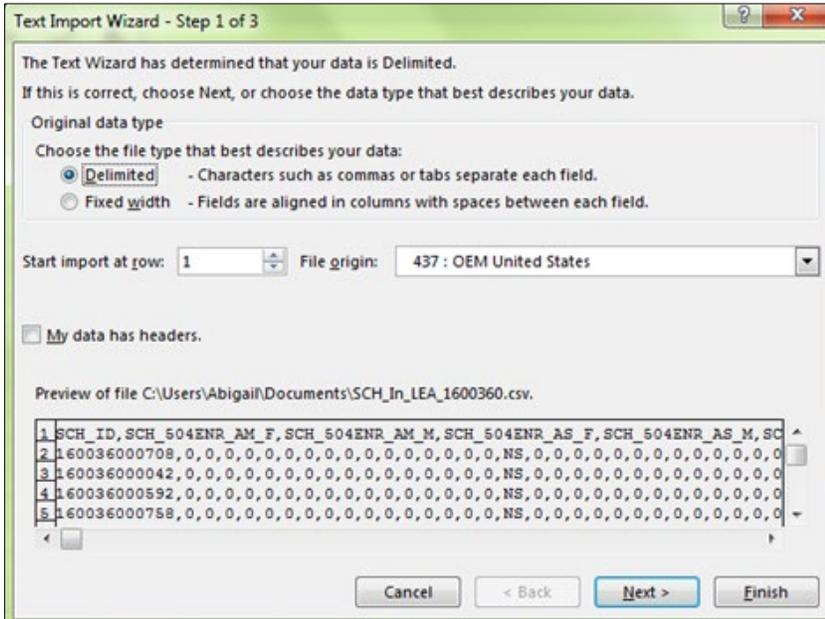


Figure 8. Text Import Wizard - Step 1

Step 4

For the next step in the Excel Wizard, select the type of delimiter as **Comma**. Excel may automatically select **Tab**, and this will need to be changed to **Comma**. Then, click **Next**.

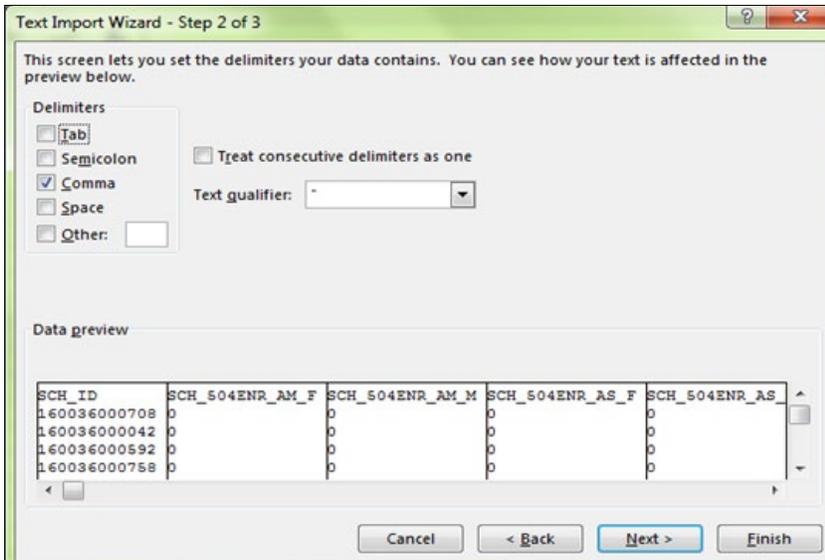


Figure 9. Text Import Wizard Step 2 – changing to Comma in Delimiters

Step 5: Critical Step

Excel will need to set the formatting for the data. In order to preserve the 12-digit School ID, make sure to select **Text** for the first column of SCH_ID.

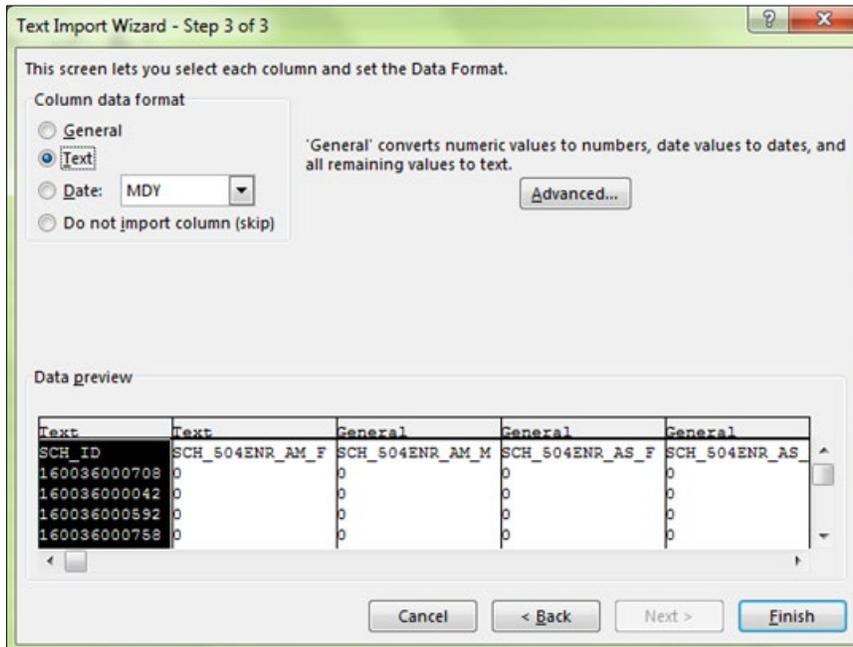


Figure 10. Text Import Wizard Step 3 – changing to Text in Column Data Format

Step 6

Click **Finish** and a box will appear asking where the data should be imported. Select either **Existing Worksheet** or **New Worksheet** and click **OK**.

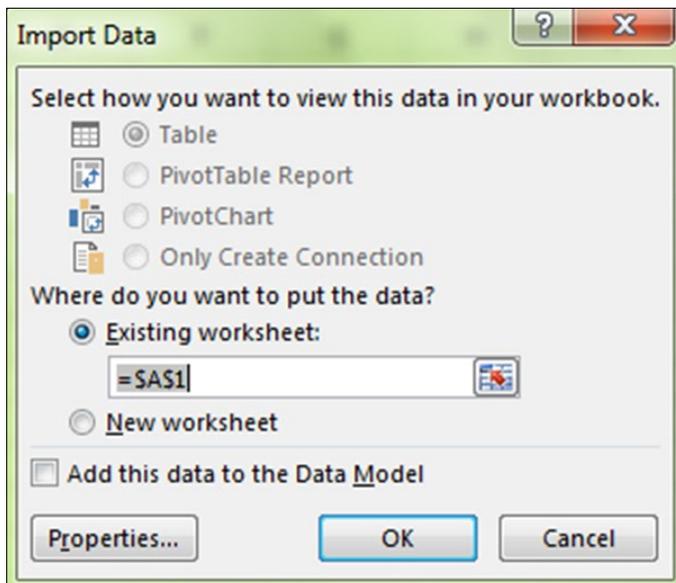


Figure 11. Import Data screenshot

How to Make Changes in Data from Previously Saved CSV Files

LEAs may need to make changes in their CSV Files before uploading into the Submission System. To maintain the proper format and data element ID headers from the [CRDC LEA Form Excel Template](#) or [School Form Excel Template](#), re-open the original Excel Templates which include all data entries. LEAs may make changes under the Excel file and resave as a new flat file (.csv). Please refer to [Managing Flat File Submissions](#) when submitting partial files or overriding a previously submitted flat file. The file submission feature of CRDC allows flexibility for managing data submissions. This document will assist with organizing, submitting partial files, delegating responsibilities, and assigning permissions.

Changes or corrections can be made after a file has been created. Be cautious when viewing or working with an already created CSV file in Excel or another spreadsheet application. If a CSV file is opened in Excel by double clicking on the file name, then text fields may be converted to numbers. This means the LEA ID or School ID may change to a truncated number with dropped leading zeros, or change to scientific notation (e.g., 5.60426E+11), which will not be read by the CRDC data collection submission system. Tips to avoid these errors are found in the ***How to Import CSV Files into Excel Files*** section of this document on page 4. Tips to address these errors can also be found in the [Troubleshooting School or LEA IDs Converted by Excel](#) tip sheet.

Contact the Partner Support Center

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