Pennsylvania Information Management System

Postsecondary Perkins Sample File Instructions

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Version 1.0

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Introduction

Starting with the 2009-10 End of Year data collection, Perkins student-based reporting occurred through the Pennsylvania Information Management System (PIMS). The Perkins data collected in PIMS is very similar to the data collected in the years prior to the use of PIMS. The format, detailed in the PIMS Postsecondary Perkins User Manual, however, is significantly different.

PDE encourages institutions to extract the data required for the two Perkins PIMS templates from their Student Information System (SIS). PDE realizes, however, that not all institutions will have all of the required data integrated into their SIS. To assist institutions with this PIMS submission, PDE is making available "sample files" that optionally can be used to produce the data in the appropriate format. This document provides instructions for using the sample files.

Sample File Details and Important Dates

The Perkins sample files are actually two separate "sheets" or "pages" within a single Microsoft Excel workbook or file. The two separate sheets within the Perkins_Sample_Templates_v1.1.xls file represent each of the two required PIMS templates:

- PS_Student_Institution
- Campus_Student_Program_Fact

It is important to note that the sample files will be most useful to institutions that can manually enter all of their data into these two sheets. Additional important notes regarding the sample files:

PIMS template fields that are not collected are hidden in the sample files. This is why the sample files will work best for institutions that can manually enter the data. The hidden columns will make it difficult for institutions to copy data into the files.

Each of the Excel sheets are "locked" to preserve the formatting. This guards against the inadvertent deletion or addition of a column or other formatting changes that would make the format inconsistent with PIMS.

To submit a completed sample file to PIMS, an institution will need to save each template page in the file in comma separated value format (CSV). If changes/corrections are required it is imperative that these corrections are made within the Excel version of the sample file, not the CSV version. After the corrections are completed the Excel file will then need to be saved as CSV again for submission to

PIMS. If corrections are made to the CSV all formatting and validations applied to the sample files will be lost.

Instructions

Open the Excel file and select a sheet by clicking on a tab at the bottom of the screen.

Each sample file contains a header record and a few sample records. These samples records must be cleared prior to inserting new data. To clear the contents of the sample data:

1. Select/highlight row
2. Right click mouse
3. Select "Clear Contents"

Once the sample records are cleared, data can be manually entered into the cells. Each sample file includes all of the fields listed in the corresponding template specification shown in the PIMS Postsecondary Perkins User Manual. The columns containing fields that show as NOT COLLECTED in the user manual are hidden in the sample files. Refer to the PIMS Postsecondary Perkins User Manual for complete instructions on the appropriate format of each data field.

The sample files include cells that are formatted in text format. For example, certain fields in which the data could start with a zero (e.g. Program Code (CIP code)) are formatted as text. Additionally, the date fields are formatted specially to ensure the dates are in ISO date format (YYYY-MM-DD).

NOTE: As noted above copying and pasting data is not recommended because of the cell formatting within the templates. However, using the "Paste Special" option and selecting "Values" or "Unformatted text" will allow you to paste cell values or plain text into a cell and maintain the destination formatting. This allows you to paste dates or CIP codes into a sample file and keep the appropriate formatting.

Many Perkins data fields have a standard code set associated with them (e.g., Gender Code has values of "M" and "F"). In most cases these standard values have been added to the sample files as cell drop-down boxes. When a field is selected that has a drop-down box, an arrow will appear to the right of the cell. To select the appropriate value:

1. Click on the arrow
2. Select the appropriate value

NOTE: Values can be manually entered or pasted (using the "Paste Special" option described above) into the field IF they are one of the valid options in the drop-down list.

Data entered into each of the Perkins sample worksheets must be saved to separate files, in comma separated value (CSV) format to upload into PIMS.

1. Click FILE
2. SAVE AS
3. CSV (Comma delimited) (*.csv)

NOTE: Each sheet in the Excel workbook must be saved separately. The file naming convention is specified in the user manual.

- InstitutionID_TargetTable_YYYYMMDDHHMM.xxx
- Example: 100000009_PS_STUDENT_INSTITUTION_20190616.CSV. It includes:
    1. Institution ID = 9-digit Administrative Unit Number
    2. Target Table (located on template) e.g., "PS_STUDENT_INSTITUTION"
    3. Time Stamp e.g., "201907080815"
    4. File Extension e.g., "csv"
        - csv: comma delimited
        - tab: tab delimited

IMPORTANT: If you open the CSV file after saving it, Excel will automatically reformat the plain-text data for fields that contain dates and codes that contain leading zeros (CIP Codes, etc) to default formats that PIMS will not accept. Any changes to the data should be made in the XLSX version of the file and the sheet re-saved as a CSV. Additionally, if using the CSV format, please avoid using commas in the data (e.g., names) as this would be misread as a delimiter by PIMS.