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 (LEA) using older versions of Excel, please contact the CRDC Partner Support Center.

If your LEA was working with data in Excel, the data will need to be changed to a format that the CRDC web-based data collection tool can understand. The CRDC data collection tool system only accepts comma separated value (CSV) files. CSV files can contain large amounts of data while maintaining a relatively small file size. Transforming an Excel file to CSV is easy, but the steps must be followed exactly or the file will NOT upload properly. Pictures are included below to provide illustration to those who may not be familiar with Excel.

Step 1

Click the Excel tab with your CRDC data. If you are using the CRDC Excel template, this is the "Consolidated" tab.
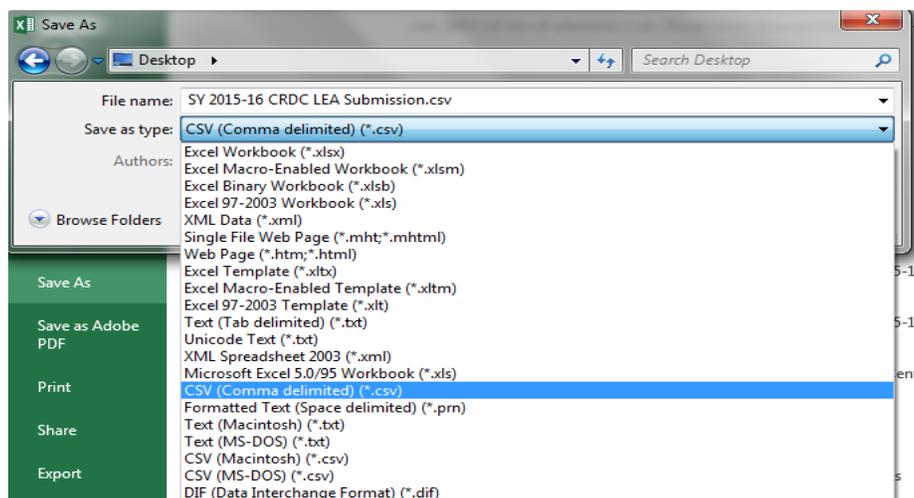
> **Tip**: *Save time resolving errors by double checking that the first data element ID is either the SCH_ID or LEA_ID.*

Step 2

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

Step 3

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

Step 4

Once the new window appears, pick the destination of where you would like your file to be saved, and name the file.
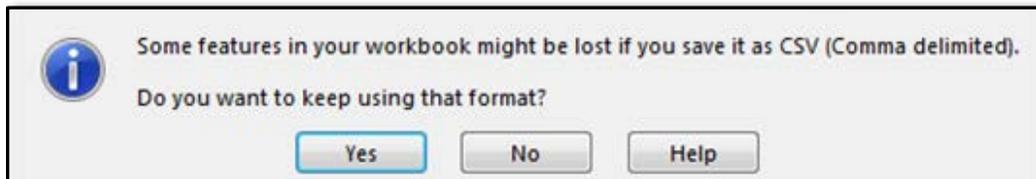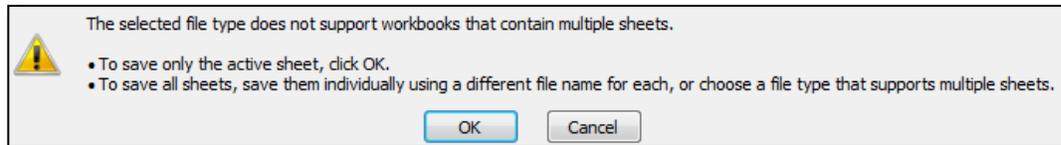
> **BEFORE YOU CLICK THE "SAVE" BUTTON, click on the "Save as Type" dropdown menu, under the File Name field. BE SURE TO SELECT "CSV (COMMA DELIMITED)".**

Step 5

Click the "Save As" 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.

The selected file type does not support workbooks that contain multiple sheets.

• To save only the active sheet, click OK.
• To save all sheets, save them individually using a different file name for each, or choose a file type that supports multiple sheets.

[OK] [Cancel]

Some features in your workbook might be lost if you save it as CSV (Comma delimited).

Do you want to keep using that format?

[Yes] [No] [Help]

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

What if I need to make changes or corrections to the file?

Be cautious when viewing or working with an already created CSV file in Excel or another spreadsheet application. If you open a CSV file in Excel by double clicking on the file name, text fields can 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 tool system. Tips to avoid these errors are found in the "How to Import CSV Files into Excel Files" tip sheet. Tips to address these errors are found in the "Troubleshooting School or LEA IDs Converted by Excel" tip sheet.