

## **Building an IPEDS Calendar Tutorial Script 2020-21 Data Collection Cycle**

In this video, we are going to discuss how to build an IPEDS calendar in Excel. This is a great tool that will help you keep track of important deadlines and provide a nice handout you can share with colleagues on your campus. This document is available for download, so you can save your own document and edit it as needed later.

Our example uses the IPEDS Completions survey component. When you open the file, you will notice it has two worksheets. One called Completions Example-Blank, which we see here, and another called Completions Example-Completed. We are going to work with the Blank worksheet for now and then highlight the Completed worksheet later in the video.

You will notice that each month, from July to November has its own set of columns and that the top of the worksheet has a calendar format, while the bottom has a list of every day in the month, a field for the event name, and a spot for notes. When you type text into the Event or Step column, the text will appear in the corresponding calendar box. For example, if I type “Start” in the July 6<sup>th</sup> Event or Step row, it appears in the calendar above. At the very bottom of the file is a list of common steps that you can use to build your calendar. You may find that you need additional steps for your own institution, so use this list as a starting point.

For the Completion's survey, the most important date is the date by which we must have the survey locked. In this case, that locking date for IPEDS Keyholders is Wednesday, October 14, 2020. You can see that we already have that listed in the calendar. And, if you scroll down to the list of events, you will see that it is also highlighted in yellow. Now, by working backwards from the locking date, we can add all of these steps below to our calendar.

What we can do is simply copy a step from the bottom of our worksheet and then come over here to our list of days and paste it wherever we want.

Although this video will not go through each step in the data reporting process, I encourage you to review the AIR and NCES documents that will help you better understand this process. Step 14, which includes going through your notes and saving files, occurs after you have locked the survey, so we are going to skip that step at this point. Let's start with Step 13, running the final edit check and locking the survey. If we're working backwards from our lock date, this needs to go in a little bit before we want to lock our survey. Let's choose to put that in on October 9. This is our ideal date to actually lock the survey. Notice that we've given ourselves an extra week by putting this in on the 9<sup>th</sup>. And again, notice that when we pasted that in on the 9<sup>th</sup> it appeared up here in the calendar.

Now, let's look at step 12, running initial edit checks and editing if needed. We're going to put that in around the 5<sup>th</sup> of October, which gives us a day or two to make any changes that may be needed. And then step 11, which is finalizing the survey, we're going to put that in around the 2<sup>nd</sup> of October. You can keep doing this with all the steps to fully build out your own calendar.

Now, let's take a look at the completed calendar. You can see that all our steps are noted in both the calendar view and steps column. In addition, any special notes are listed next to the event. You can build a similar calendar for each survey component that will help you plan ahead for your institution's IPEDS reporting.