# **Real Estate Board: Continuing Education Reporting**

#### How to Upload Continuing Education Credits to DPOR SFTP Server using Excel

Education providers (vendors) report continuing education credits to the Real Estate Board at DPOR by sending properly formatted files via SFTP.

DPOR requires data files be submitted in comma-delimited format (popularly referred to as CSV files) but allows vendors to create the CSV files using any method available. An example of how to generate a CSV data file using Microsoft Excel is provided below.

The following instructions assume you have <u>installed and set up an SFTP client</u>. If you have further questions, please contact the <u>Board's Education Section</u>.

### **Upload File Format**

DPOR will <u>only</u> accept comma-delimited (CSV) text files for reporting education credits. The files you upload **must conform to this format**, which is compatible with MS Excel. Text data is not quoted. The file should contain a header row.

| Header         | Description                       | Format   | Examples          | Notes  |
|----------------|-----------------------------------|--|-------------------|--|
| BD             | Board                             | always "02"  | 02                | Always "02"  |
| OC             | Occupation                        | always "25"  | 25                | Always "25"  |
| CERT           | Certification (License)<br>Number | 6 digits, zero<br>padded                               | 000123            | 654321   |
| SSN            | Social Security<br>Number         | 9 digits, zero<br>padded                               | 123456789         | May be empty   |
| FIRST<br>NAME  | First Name                        | up to 16<br>characters                                 | John              | These 3 fields <i>must match</i><br><i>exactly</i> what DPOR has on file |
| MIDDLE<br>INL  | Middle Name                       | up to 16<br>characters                                 | J                 | Use <u>License Lookup</u> to ensure                                      |
| LAST<br>NAME   | Last Name                         | up to 20<br>characters                                 | Snow              | the data you are entering is valid.                                      |
| GEN            | Generation                        | up to 3<br>characters                                  | 3rd or III        |  |
| MM             | Class Month                       | 01-12  | 07                |  |
| DY             | Class Day                         | 01-31  | 12                |  |
| YYYY           | Class Year                        | 4 digit year   | 2012              |  |
| SCHOOL<br>CODE | School Code                       | the right-most<br>4 digits of<br>your school<br>number | 0987              | In this example, the school number is 0211000987                         |
| CLASS<br>CODE  | Class Code                        | 5 digits, zero<br>padded                               | 12345 or<br>01234 |  |

#### Format Specification

## **Formatted File Example**

Below is an example of what a properly formatted upload file looks like in a text editor (such as Notepad):

```
BD,OC,CERT,SSN,FIRST NAME,MIDDLE INL,LAST NAME,GEN,MM,DY,YYYY,SCHOOL CODE,CLASS
CODE
02,25,070285,012345678,Darth,Anakin,Skywalker,,08,01,2012,1234,22103
02,25,802691,Han,Solo,07,07,2012,1234,26710
02,25,307690,012345678,Boba,Fett,12,23,2012,1234,07902
02,25,399327,Leia,Organa,11,29,2012,1234,61938
02,25,911290,Arnold,D,Palmer,01,31,2012,1234,32398
```

## Using Excel to Generate an Upload File

One way to create the CSV format required by DPOR is to use a spreadsheet program such as MS Excel. The following instructions describe the process for using Excel to enter, format and finally export your data into a CSV file.

- 1. Download the <u>Template for Real Estate CE Data</u> (Excel spreadsheet), which is configured to use the field formats DPOR requires. Open the file.
- 2. Enter your data into the **Template tab**, being careful to fill in the spreadsheet columns according to the data <u>format specifications</u> required by DPOR.

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3. *(Optional)* You may choose to save a copy of the data you entered in Excel format (.xls or .xlsx), so you can easily correct, export or resubmit if DPOR has problems processing the file.

 Open the Save As file dialog box; using the school name and date (school\_name.2018-09-25.csv), save the file as a Comma delimited CSV file (the "Save as type:" <u>must be</u> <u>CSV</u>).

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5. Excel may warn you that you may only save the current tab. Click OK to the warning.



6. Excel may also warn you that saving the file in CSV format may cause you to lose some functionality. **Click OK** to the warning.

| SCHOOL_NAME.YYYY-MM-DD.csv may contain features that are not compatible with CSV (Comma delimited). Do you want to keep the workbook in this format?  To keep this format, which leaves out any incompatible features, click Yes. To preserve the features, click No. Then save a copy in the latest Excel format. To see what might be lost, click Help. |
|---|
| Yes No Help   |

7. *(Optional)* After you save the CSV file, you can open it with a text editor (such as Notepad) to verify it conforms to DPOR's format.





- 8. Upload your just-saved CSV file to DPOR's SFTP server using these instructions.
- 9. You will receive a confirmation email at the end of the day if your upload is successful.