



■ HigherEd Analytics iStrategy Basics (A User's Guide)

Office of Institutional Research

Last Updated: March 2009

What is iStrategy and what are its appropriate uses?

iStrategy is a data warehouse with a web-based reporting interface. Each night, a subset of data from Colleague (the College's ERP or central database) is copied to a separate server that supports the iStrategy tool.

Currently, Loyola has implemented the student admissions and enrollment modules of Higher Ed Analytics. In the future Loyola may adopt other modules such as financial aid or human resources after which those data would be available through iStrategy.

Because the data in iStrategy is refreshed nightly it should be considered "operational" data. Operational data can be very useful for tracking progress in operations (e.g. admissions or registration) and making operational and management decisions. Operational data should not, however, be used for reporting to external agencies—including the press—as they do not constitute the "data of record" or "census" of the College.

At this time, data for dissemination to external agencies should be referenced from the Loyola College Fact Book (found online at <http://www.loyola.edu/IR/Loyola%20Facts/Loyola%20Facts>) or the Office of Institutional Research (IR) (ir@loyola.edu). iStrategy does have the capability of "freezing" data for the purposes of capturing a census for management reporting and this function will be available in the future.

Because much of the data in iStrategy is available to the user at the unit-record (i.e. individual student) level, it is not appropriate for persons at all levels of the institution to have access to iStrategy. Access control is located in IR; if you feel that you need access or that someone in your area needs access please contact IR.

Technical support for iStrategy is the responsibility of the Business Intelligence Unit of the Applications and Systems Development (ASD) team at Loyola and can be reached at heasupport@loyola.edu.

Orientation to the User's Guide

The web interface of iStrategy utilizes the "ProClarity" tool. This tool is very user-friendly and intuitive but is also quite powerful in terms of its ability to allow you to customize reports.

This document is not intended to be comprehensive of all of the features and functionality of iStrategy or the ProClarity tool, rather it is intended to provide information on the basic and most commonly used functions.

You are encouraged to experiment with various functionalities without worry; it is not possible for you to change or corrupt the underlying data.

iStrategy Basics

A. Accessing iStrategy

Open an internet browser and type the following in the address bar:

<https://hea.loyola.edu>

When asked to log in, use your Loyola username (minus the @loyola.edu) and password.

B. Dashboard

Once logged in, the main iStrategy page / Dashboard will be displayed.

The screenshot displays the HigherEd Analytics iStrategy dashboard. The browser window is titled 'HigherEd Analytics - Windows Internet Explorer'. The address bar shows the URL 'https://hea.loyola.edu/heanalytics/frameset.asp'. The dashboard header includes the text 'HigherEd Analytics', 'Welcome tschehr', and 'Current Registration Term: Spring 09 Reporting'. The main content area is titled 'Guided Analysis: My Dashboard'. A link 'Personalize My Charts' is circled in green. Below this, there are two main sections: 'My KPI's' and 'Enrollment by Class Level'. The 'My KPI's' section has a 'Personalize' link circled in green and a table of Key Performance Indicators. The 'Enrollment by Class Level' section shows a table with columns for 'Distinct Student Count' and 'Enrolled Student Term Count'.

Subject Areas	My KPI's	Personalize	Enrollment by Class Level
My Dashboard	Key Performance Indicator		
Admissions	Enrollment (UGrad)	3,615	
Enrollment	Application Count (UGrad)	9,099	
	% Applicants Accepted (UGrad)	54.32%	
	Application Count (GRAD)	1,154	
	% Applicants Accepted (GRAD)	23.22%	
	% Accepted Enrolled (UGrad)	0.00%	

Each user has a personal dashboard that they can customize with Key Performance Indicators (KPIs) and Charts that are of particular interest to them.

To customize your KPIs, click on the “Personalize” in the “My KPI” heading.

To select charts for your dashboard, click on “Personalize My Charts” in the “Guided Analysis My Dashboard” heading.

C. Institutional Reports

iStrategy contains a number of institutional “canned” reports. Reports are organized into libraries and within libraries they are organized by topic into briefing books. The libraries are organized in a tree structure similar to the way Windows Explorer is organized. You can think of the briefing books as directories.

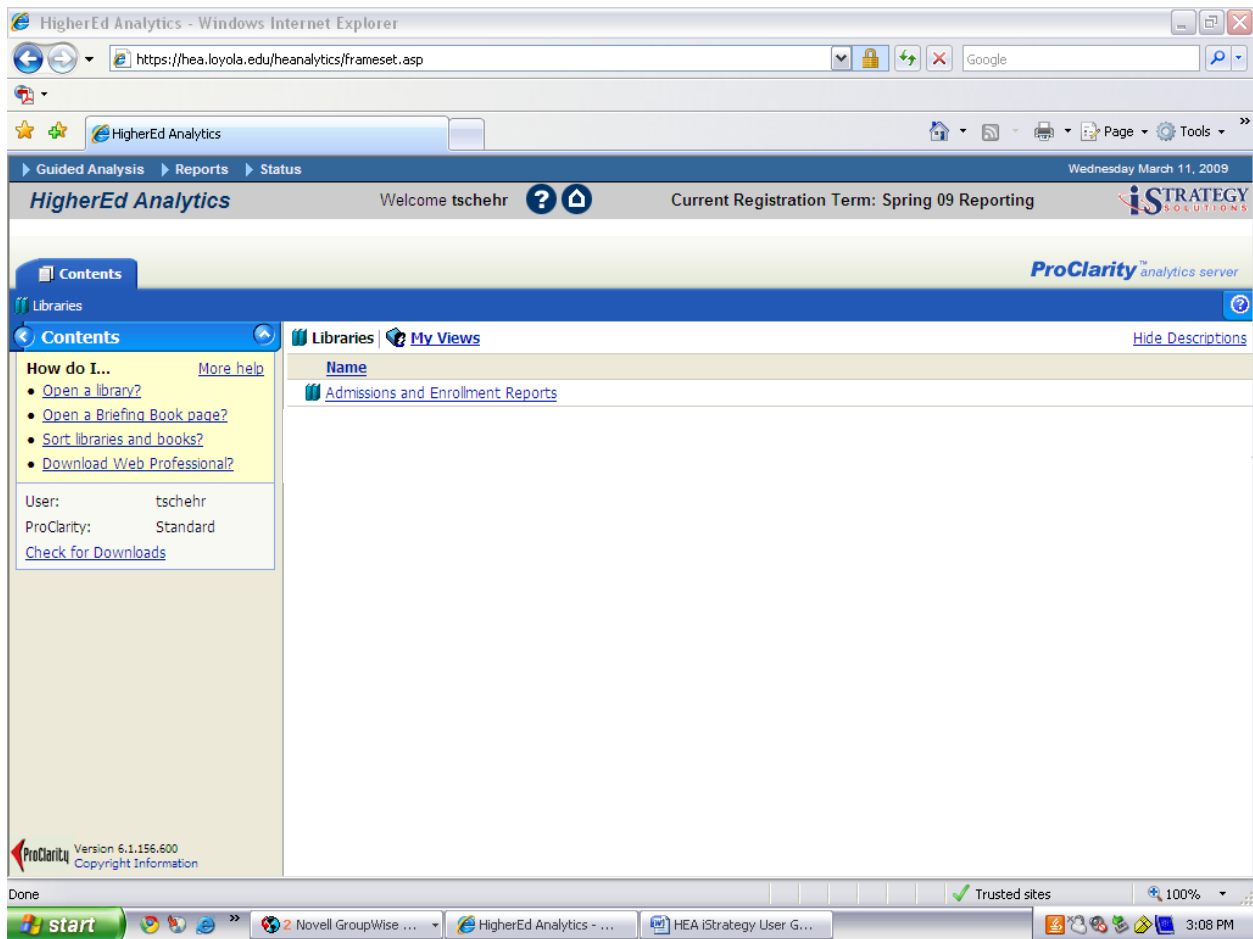
Information on customizing reports and saving new reports for your personal (or shared) use is covered in subsequent sections of this document.

C.1 Accessing Reporting Libraries

From the Dashboard, click on the “Reports” link in the top menu bar and the Reporting Libraries page will be displayed.

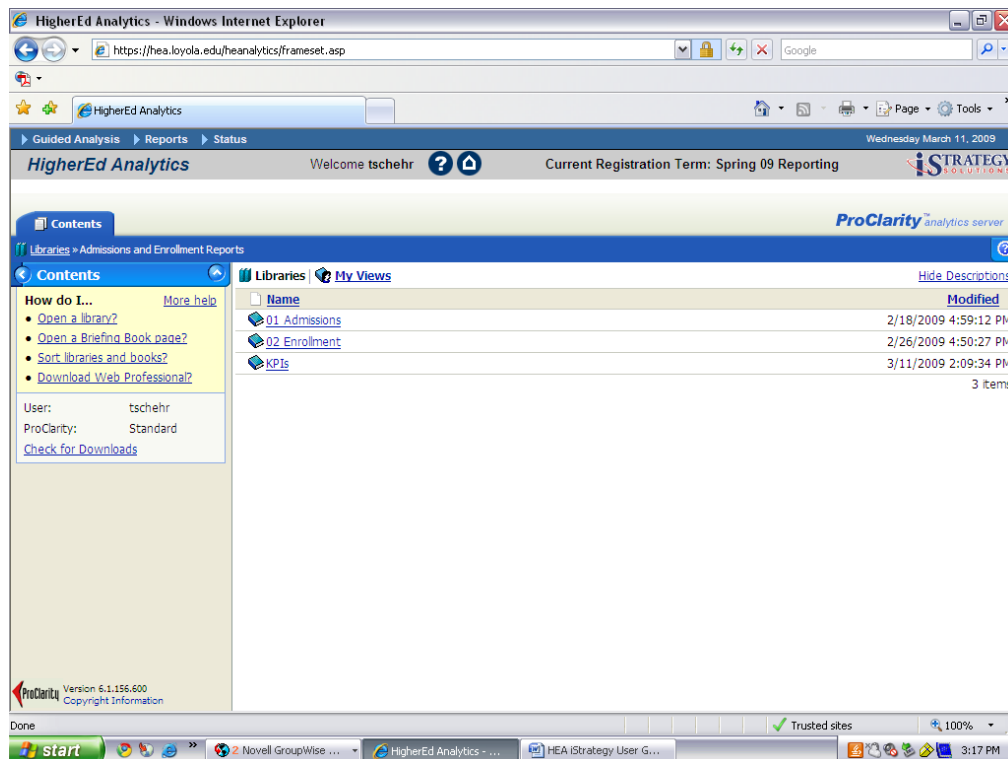
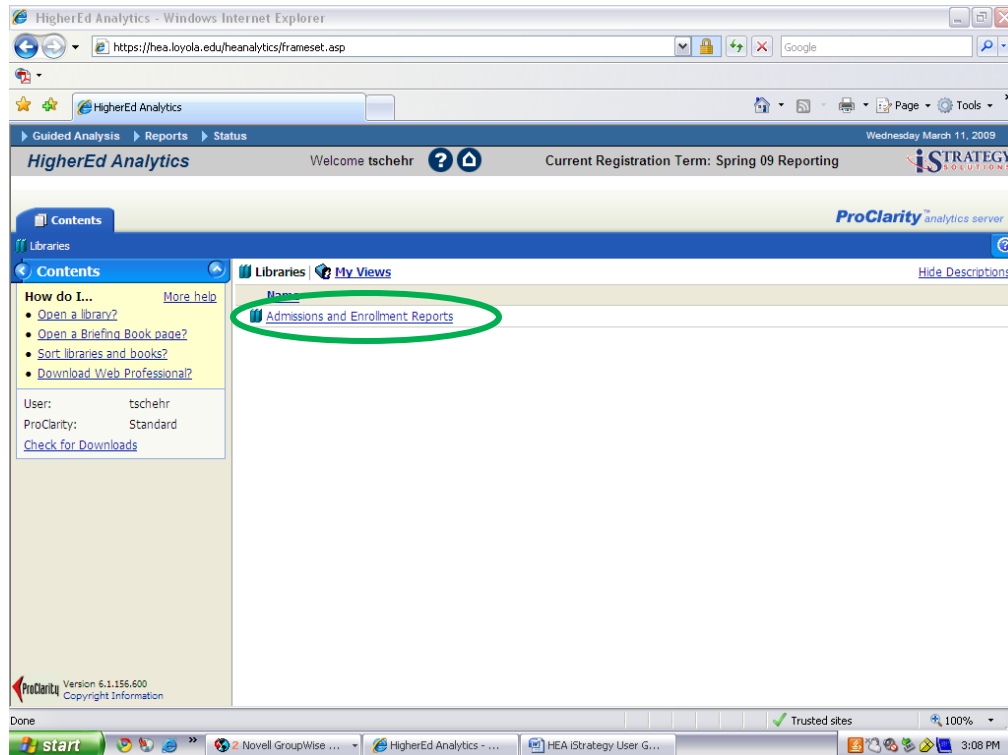
Currently there is one library “Admissions and Enrollment Reports.”

If and when Loyola adopts other data modules, additional libraries will be created.



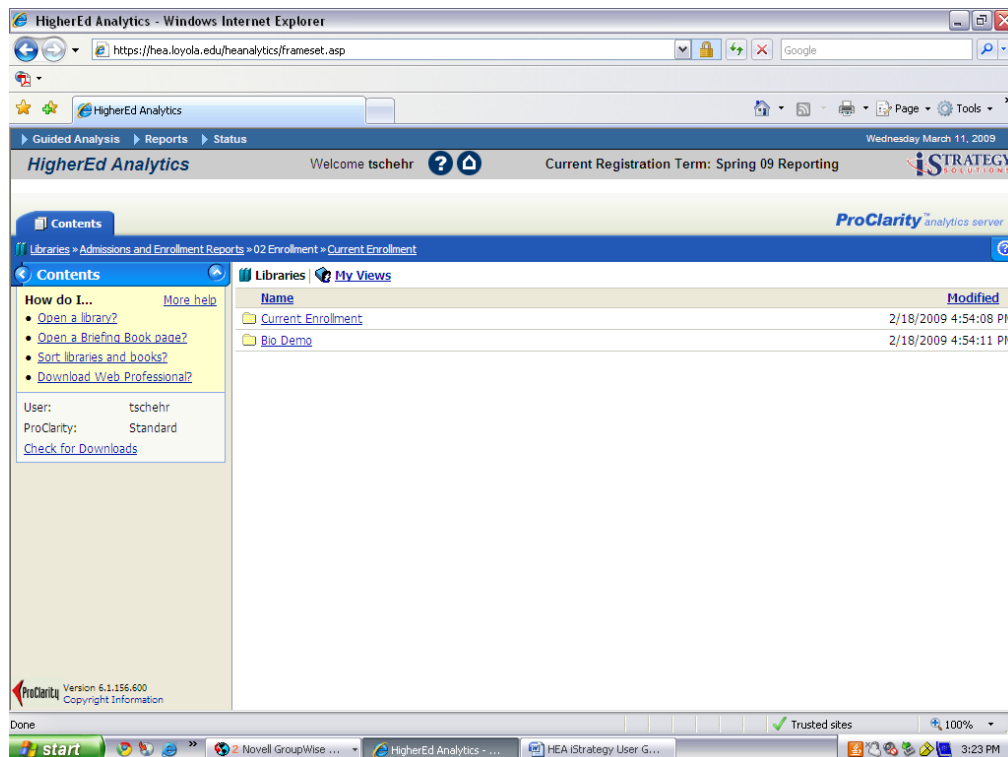
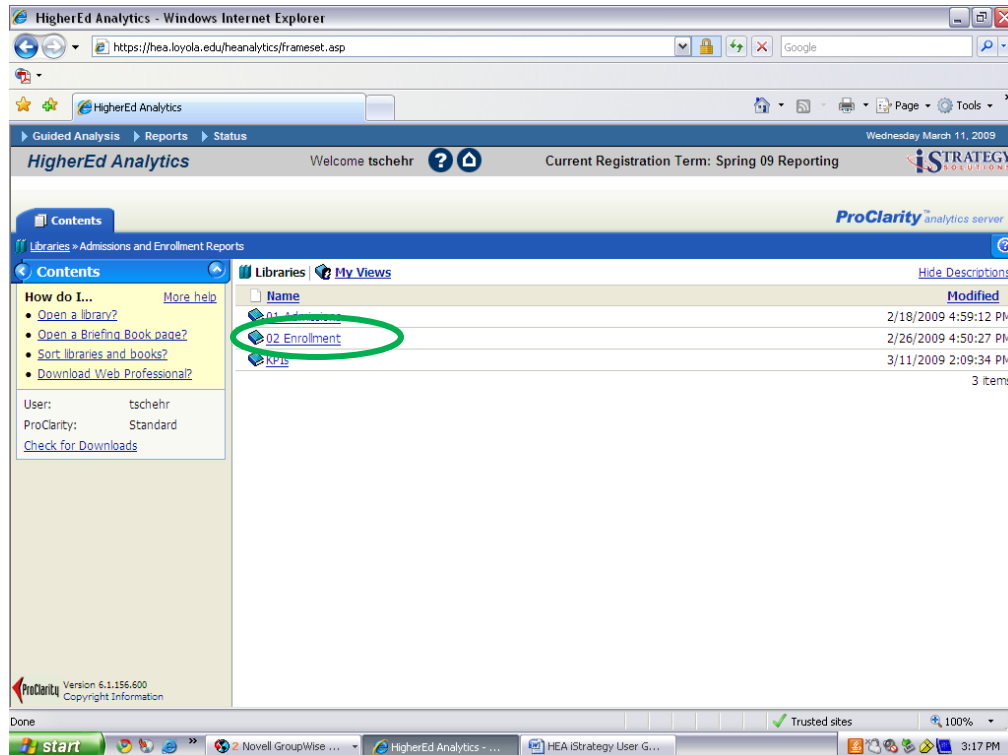
C.2 Accessing Reporting Briefing Books

From the Reporting Libraries page, clicking on the library of your choice will open the library to the briefing books.



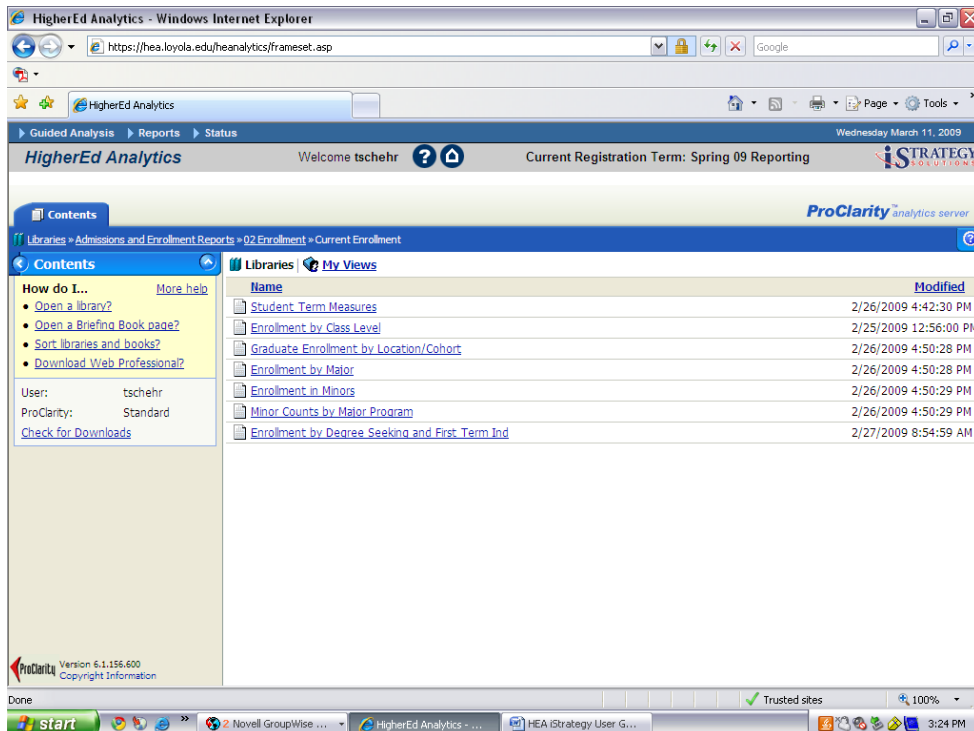
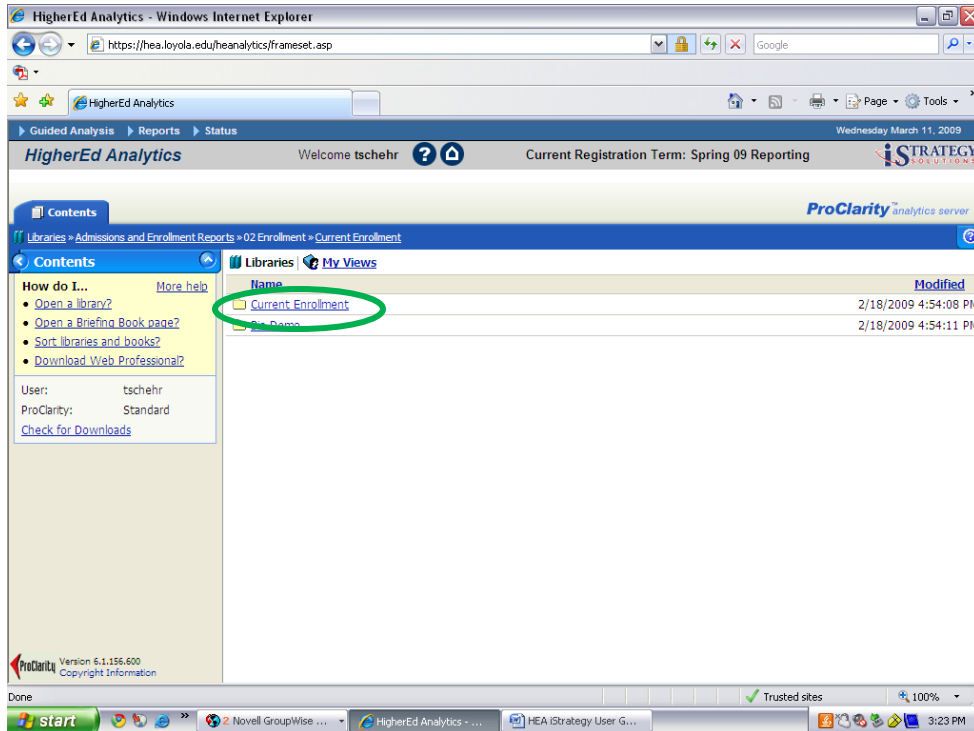
C.3 Accessing and Running Reports

From the Briefing Books page, clicking on the book of your choice will open the book to the folders/reports that it contains.



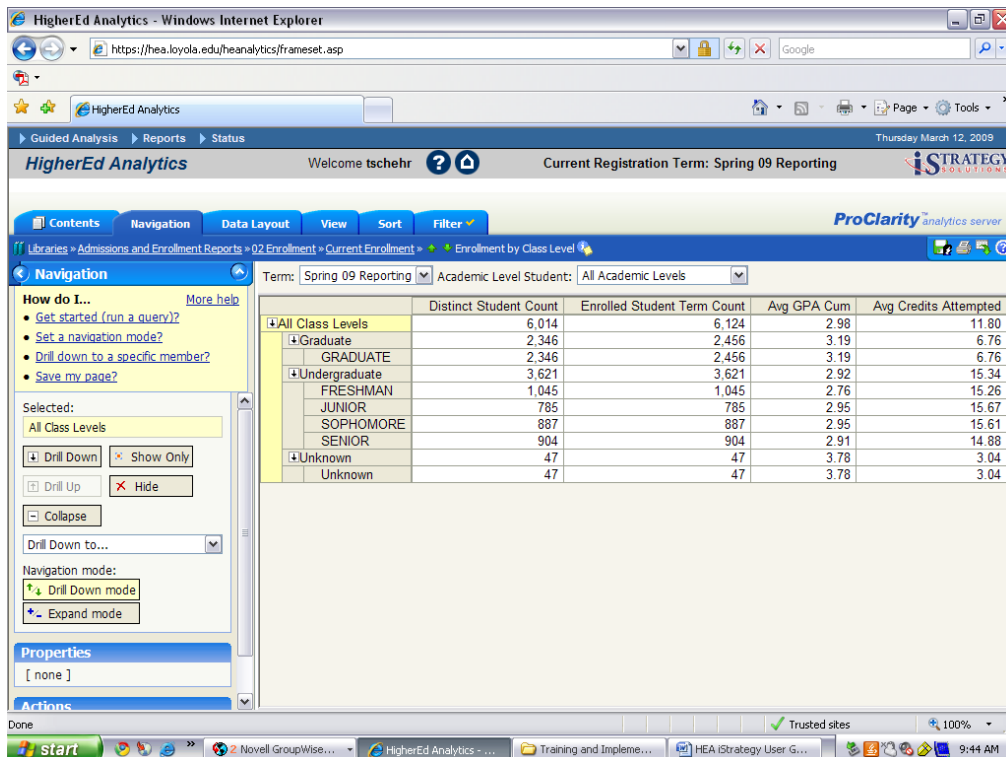
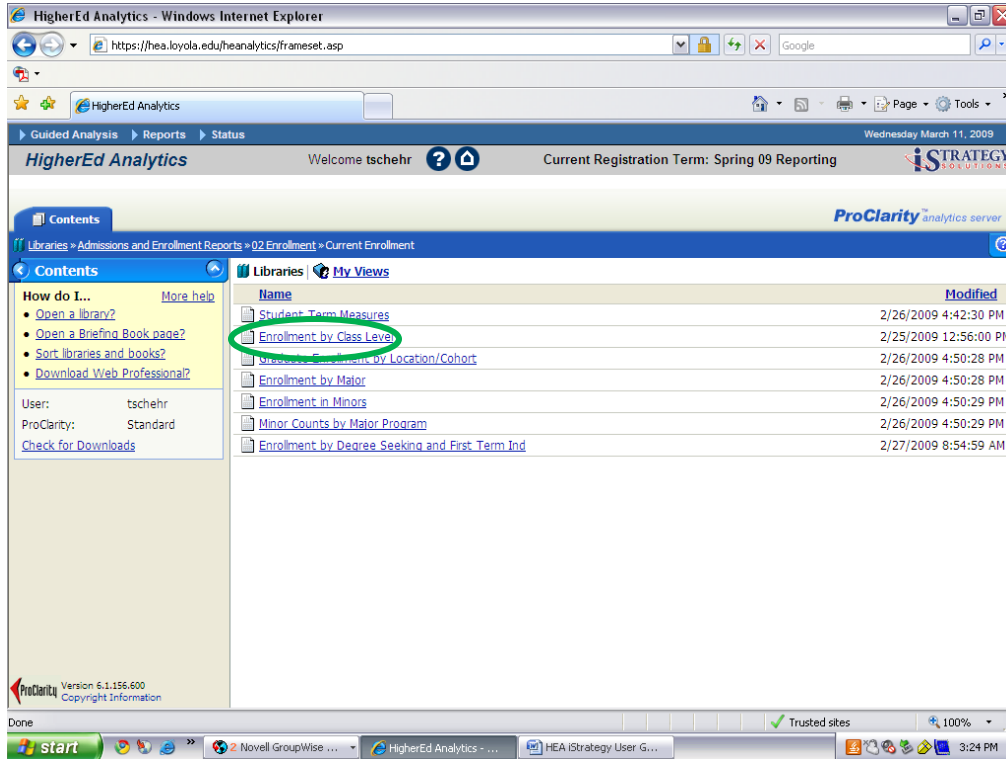
Clicking on a folder will expose the reports it contains.

Please note that users have various levels of access to reports and that new institutional reports are added periodically so the reports listed in the screen-shots below may not be exact replicas of what you see when you log into iStrategy.



To run a report, simply click on the link.

The “Enrollment by Class Level” report will be used throughout this document to illustrate features of iStrategy.



C.3 Filtering Data in Reports

At the top of the report you will see drop down menus or “page filters” that can be used to filter the information shown in the report.

In the default report on enrollment by class level the enrollment term is set to the current term and enrollment is shown for students at all academic levels.

The screenshot displays the HigherEd Analytics web application in a Windows Internet Explorer browser. The address bar shows the URL <https://hea.loyola.edu/heapanalytics/frameset.asp>. The page title is "HigherEd Analytics" and the user is logged in as "tschehr". The current registration term is "Spring 09 Reporting".

The navigation pane on the left includes a "How do I..." section with links like "Get started (run a query)?", "Set a navigation mode?", "Drill down to a specific member?", and "Save my page?". It also has a "Selected:" section showing "All Class Levels" and buttons for "Drill Down", "Show Only", "Drill Up", "Hide", and "Collapse".

The main data table displays enrollment data by class level. The table has five columns: "Distinct Student Count", "Enrolled Student Term Count", "Avg GPA Cum", and "Avg Credits Attempted". The data is organized into a tree structure under "All Class Levels".

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	6,014	6,124	2.98	11.80
Graduate	2,346	2,456	3.19	6.76
GRADUATE	2,346	2,456	3.19	6.76
Undergraduate	3,621	3,621	2.92	15.34
FRESHMAN	1,045	1,045	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88
Unknown	47	47	3.78	3.04
Unknown	47	47	3.78	3.04

If you want to see the enrollment for undergraduates only, click on the “Academic Level Student” filter and select “Undergraduates.”

The screenshot shows the HigherEd Analytics interface in a Windows Internet Explorer browser. The page title is "HigherEd Analytics - Windows Internet Explorer". The address bar shows the URL "https://hea.loyola.edu/heapanalytics/frame.asp". The page header includes "HigherEd Analytics", "Welcome tschehr", and "Current Registration Term: Spring 09 Reporting". The navigation pane on the left shows "Contents", "Navigation", "Data Layout", "View", "Sort", and "Filter". The "Filter" tab is active, and the "Academic Level Student" dropdown menu is open, showing options: "All Academic Levels", "All Academic Levels Continuing Education Units Consortium", "Graduate Level", "Undergraduate", and "Unknown". The "Undergraduate" option is selected and highlighted with a green circle. The main data table displays enrollment data for Spring 09 Reporting, with columns for "Distinct Student Count", "Avg GPA Cum", and "Avg Credits Attempted". The table is filtered to show only undergraduate data.

Term:	Academic Level Student:	Distinct Student Count	Avg GPA Cum	Avg Credits Attempted
Spring 09 Reporting	All Academic Levels	6,014	2.98	11.80
Spring 09 Reporting	All Academic Levels Continuing Education Units Consortium	2,346	3.19	6.76
Spring 09 Reporting	Graduate Level	2,346	3.19	6.76
Spring 09 Reporting	Undergraduate	3,621	2.92	15.34
Spring 09 Reporting	Unknown	1,045	2.76	15.26
Spring 09 Reporting	FRESHMAN	785	2.95	15.67
Spring 09 Reporting	JUNIOR	887	2.95	15.61
Spring 09 Reporting	SOPHOMORE	904	2.91	14.88
Spring 09 Reporting	SENIOR	47	3.78	3.04
Spring 09 Reporting	Unknown	47	3.78	3.04

C.4 Sorting Data in Reports

To sort reports based on a column:

1. click the “Sort” tab at the top of the report
2. click the drop down sort menu that is on the left side of the screen
3. click the column that you want to the sort to be based on
4. click on the order that you want and “Preserve Peer Groups”
5. click the “Apply” button that is at the top of the left menu pane

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tschehr

Current Registration Term: Spring 09 Reporting

Thursday March 12, 2009

Contents Navigation Data Layout View **Sort** Filter

Client » Current Enrollment » Enrollment by Class Level » Distinct Student Count, Enrolled Student Term Count, Avg GPA Cum, Avg Credits Attempted for Enrolled, Spring 09 Reporting

Sort: No Sort

How do I...
 • Sort rows?
 • Preserve peer groups while sorting?

Sort: No Sort
 Distinct Student Count
 Enrolled Student Term Count
 Avg GPA Cum
 Avg Credits Attempted

Term: Spring 09 Reporting Academic Level Student: All Academic Levels

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	6,014	6,124	2.98	11.80
Graduate	2,346	2,456	3.19	6.76
GRADUATE	2,346	2,456	3.19	6.76
Undergraduate	3,621	3,621	2.92	15.34
FRESHMAN	1,045	1,045	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88
Unknown	47	47	3.78	3.04
Unknown	47	47	3.78	3.04

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tschehr

Current Registration Term: Spring 09 Reporting

Thursday March 12, 2009

Contents Navigation Data Layout View Sort Filter

Client » Current Enrollment » Enrollment by Class Level » Distinct Student Count, Enrolled Student Term Count, Avg GPA Cum, Avg Credits Attempted for Enrolled, Spring 09 Reporting

Sort: Enrolled Student Term Count

How do I...
 • Sort rows?
 • Preserve peer groups while sorting?

Sort: Enrolled Student Term Count
 High to Low
 Preserve Peer Groups

Term: Spring 09 Reporting Academic Level Student: All Academic Levels

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	6,014	6,124	2.98	11.80
Graduate	2,346	2,456	3.19	6.76
GRADUATE	2,346	2,456	3.19	6.76
Undergraduate	3,621	3,621	2.92	15.34
FRESHMAN	1,045	1,045	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88
Unknown	47	47	3.78	3.04
Unknown	47	47	3.78	3.04

C.5 Drilling to Detail

You may want to see the unit-record data underlying a count. In this case, click on the cell with the count in it and click on “Drill to Detail.” A new window will open displaying the detailed records related to the selected cell.

Note: You can only drill to detail on stored measures not on calculated values such as GPA or credit hours.

Identifying information has been blocked out in the sample screen shot.

You can copy the detailed results to Microsoft Excel using the following steps:

1. Right click on the report and select “Select All”
2. Right click on the report and select “Copy”
3. Open Microsoft Excel, right mouse click on cell A1 and select “Paste”

The screenshot shows the HigherEd Analytics interface in a Windows Internet Explorer browser. The page displays a table with student counts for Spring 09 Reporting. The table has columns for Distinct Student Count, Enrolled Student Term Count, Avg GPA Cum, and Avg Credits Attempted. The 'Unknown' row is highlighted in yellow, and a green circle is drawn around the '47' in the 'Distinct Student Count' column. A context menu is open over this cell, showing options: 'Drill To Detail' (highlighted with a green circle), 'Analyze in Decomposition Tree', and 'Student Term Drillthrough'.

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	6,014	6,124	2.98	11.80
Graduate	2,346	2,456	3.19	6.76
GRADUATE	2,346	2,456	3.19	6.76
Undergraduate	3,621	3,621	2.92	15.34
FRESHMAN	1,045	1,045	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88
Unknown	47	47	3.78	3.04
Unknown	47	47	3.78	3.04

The screenshot shows the HigherEd Analytics web application interface. The main content area displays a 'Drill to Detail' report titled 'Details for Unknown, Distinct Student Count, Enrolled, Spring 09 Reporting'. The report is presented as a table with columns for various dimensions and measures. The dimensions include Record, [Dim Student], [Student] Birth Date, [Student] Primary Email, [Student] Origin Code, [Student] Address 1, [Student] Address 2, [Student] City, [Student] State Description, [Student] Zip, and [Dim Term]. The measures include 'Student Count' and 'Attempts'. The table lists six records, all with a 'Student Count' of 1. The first record is for a student born on 987-05-04, enrolled at 'College of Notre Dame of Md'. The second record is for a student born on 987-11-17, also at 'College of Notre Dame of Md'. The third record is for a student born on 987-07-05, enrolled at 'Towson University'. The fourth, fifth, and sixth records are for students born on 900-01-01, 900-01-01, and 986-02-08 respectively, all enrolled at 'Towson University'. The 'Attempts' column shows values of 11.80, 6.76, 6.76, 15.34, 15.26, and 15.67 for the first six records. The interface includes a navigation pane on the left with options like 'How do I...', 'Navigation', 'Properties', and 'Actions'. The top of the application shows the user 'tschehr' and the current registration term 'Spring 09 Reporting'.

C.6 Printing and Exporting Reports

Reports can be printed or exported to Excel.

To Print:

Click on the "Print" icon in the upper right corner of the report. A page will display to let you set some formatting options. Once you specify your options click "Continue" and a new window will open with the print-ready report. At this point you can use your browser print function to print the report.

In most cases you will want to use the default setting of "Current View" and deselected "Separate view for each slicer value."

The screenshot shows the HigherEd Analytics web application in a Windows Internet Explorer browser. The main report displays enrollment data for Spring 09 Reporting. A 'Format for Printing' dialog box is open, with the 'Titles' tab selected. The 'Print' section has three options: 'Current view' (selected), 'Entire book', and 'Separate view for each slicer value'. The 'Layout' section has 'Portrait' and 'Landscape' options, with 'Landscape' selected. The 'Page size' is set to 'Letter'. The 'Continue...' button is highlighted.

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	6,014	6,124	2.98	11.80
Graduate	2,346	2,456	3.19	6.76
Undergraduate	3,668	3,668	2.76	15.04
Graduate				6.76
Undergraduate				15.34
Graduate				15.26
Undergraduate				15.67
Graduate				15.61
Undergraduate				14.88
Graduate				3.04
Undergraduate				3.04

To Export:

Click on the “Export” icon in the upper right corner of the report. You will receive a standard export open or save dialog box from which you can specify your preference.

Note: you may be asked to log in again in order to export a report to Excel.

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	6,014	6,124	2.98	11.80
Graduate	2,346	2,456	3.19	6.76
GRADUATE	2,346	2,456	3.19	6.76
Undergraduate	3,621	3,621	2.92	15.34
FRESHMAN	1,045	1,045	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88
Unknown	47	47	3.78	3.04
Unknown	47	47	3.78	3.04

D. Customizing and Saving Reports

Reports can be customized and saved as a new report in your “My Views” area of the Library.

D.1 Saving a New Report

If you make changes to a report and want that report to be saved so it can be re-run at a later time, click on the “Save to My Views” icon and give the report a new name.

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Guided Analysis | Reports | Status

HigherEd Analytics Welcome tschehr ? Current Registration Term: Spring 09 Reporting

Contents | Navigation | Data Layout | View | Sort | Filter

ProClarity analytics server

Enrollment by Class Level > Distinct Student Count, Enrolled Student Term Count, Avg GPA Cum, Avg Credits Attempted for Enrolled, Spring 09 Reporting, Undergraduate

Term: Spring 09 Reporting Academic Level Student: Undergraduate Save this page to My Views

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	3,621	3,621	2.92	15.34
Undergraduate	3,621	3,621	2.92	15.34
FRESHMAN	1,045	1,045	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88

Navigation

How do I... More help

- Get started (run a query)?
- Set a navigation mode?
- Drill down to a specific member?
- Save my page?

Selected:

All Class Levels

Drill Down Show Only

Drill Up Hide

Collapse

Drill Down to...

Navigation mode:

Drill Down mode

Expand mode

Properties

[none]

Actions

start Novell GroupWise... HigherEd Analytics - ... Training and Impleme... HEA iStrategy User G... 11:49 AM

The report will then be available in the “My Views” area of the Library.

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Guided Analysis | Reports | Status

HigherEd Analytics Welcome tschehr ? Current Registration Term: Spring 09 Reporting

Contents | Libraries | My Views

ProClarity analytics server

Libraries

How do I... More help

- Open a library?
- Open a Briefing Book page?
- Sort libraries and books?
- Download Web Professional?

User: tschehr

ProClarity: Standard

Check for Downloads

Libraries: My Views

Admissions and Enrollment Reports

Revised Sample Reports

Sample Reports

2 items

ProClarity Version 6.1.156.600 Copyright Information

Done

start Novell GroupWise... HigherEd Analytics - ... Training and Impleme... HEA iStrategy User G... 11:52 AM

D.2 Drilling to Another Dimension

If you want to see a subset of the data in your report disaggregated by another attribute you can drill to detail.

For example, if you wanted to see the gender breakdown of seniors you would:

1. Click on the "Senior" label
2. Click on the "Drill Down to . . ." menu that is on the left side of the screen
3. Select "Gender" from the list in the drill down to menu

You will notice the "breadcrumbs" at the top of the report now indicate that the report is of "SENIOR, Undergraduate (Gender)."

The screenshot shows the HigherEd Analytics web application interface. The main content area displays a table with columns: Distinct Student Count, Enrolled Student Term Count, Avg GPA Cum, and Avg Credits Attempted. The table lists data for All Class Levels, Undergraduate, and various class levels (FRESHMAN, JUNIOR, SOPHOMORE, SENIOR). The 'SENIOR' row is highlighted, and a context menu is open over it, showing options: Drill Down, Drill Up, Expand, Show Only, and Hide. The 'Drill Down' option is selected. The left sidebar contains a 'Navigation' section with a 'How do I...' link and a list of actions: Get started (run a query)?, Set a navigation mode?, Drill down to a specific member?, and Save my page?. Below this is a 'Selected:' section showing 'SENIOR' and buttons for Drill Down, Drill Up, Expand, and Hide. The 'Properties' section at the bottom left shows 'Academic Level: Undergraduate' and 'Add Date: 1/1/1900'. The top navigation bar includes 'Guided Analysis', 'Reports', and 'Status' tabs, along with a 'Current Registration Term: Spring 09 Reporting' indicator.

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	3,621	3,621	2.92	15.34
Undergraduate	3,621	3,621	2.92	15.34
FRESHMAN	1,045	1,045	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

Welcome tschehr ? Home - Projects

Thursday March 12, 2009

Current Registration Term: Spring 09 Reporting

ProClarity analytics server

Data Layout View Sort Filter

Term: Spring 09 Reporting Academic Level Student: Undergraduate

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	3,621	3,621	2.92	15.34
Undergraduate	3,621	3,621	2.92	15.34
FRESHMAN	1,045	1,045	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88

Navigation mode:

Drill Down mode

Expand mode

Properties

Academic Level: Undergraduate

Category:

Add Date: 1/1/1900

Drill Down to...

SENIOR

Drill Down

Drill Up

Expand

Show Only

Hide

Trusted sites

100%

start

Novell GroupWise...

HigherEd Analytics - ...

Training and Imple...

HEA iStrategy User G...

12:02 PM

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tschehr

Current Registration Term: Spring 09 Reporting

ProClarity analytics server

Navigation

How do I...
• Get started (run a query)?
• Set a navigation mode?
• Drill down to a specific member?
• Save my page?

Selected:
Female

Drill Down Show Only
Drill Up Hide
Expand

Drill Down to...

Navigation mode:
Drill Down mode
Expand mode

Properties
Source Key: F

Actions

Term: Spring 09 Reporting Academic Level Student: Undergraduate

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
Female	526	526	2.94	14.76
Male	377	377	2.86	15.04
Not Provided	1	1	3.58	15.00

start

Novell GroupWise... HigherEd Analytics - ... Training and Impleme... HEA iStrategy User G...

Trusted sites 100% 12:03 PM

To get back to the default report, use the breadcrumbs at the top of the report to go back to the original report. You may need to click on the arrows on the left side of the breadcrumbs in order to scroll back to the original report name. Once you see the original report name, click on it and you will be returned to the default report.

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frame.asp

HigherEd Analytics

Welcome tschehr

Current Registration Term: Spring 09 Reporting

ProClarity analytics server

Navigation

How do I... [More help](#)

- [Get started \(run a query\)?](#)
- [Set a navigation mode?](#)
- [Drill down to a specific member?](#)
- [Save my page?](#)

Selected:

Female

Drill Down Show Only

Drill Up Hide

Expand

Drill Down to...

Navigation mode:

Drill Down mode

Expand mode

Properties

Source Key: F

Actions

Term: Spring 09 Reporting Academic Level Student: Undergraduate

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
Female	526	526	2.94	14.76
Male	377	377	2.86	15.04
Not Provided	1	1	3.58	15.00

start

Novell GroupWise... HigherEd Analytics - ... Training and Imple... HEA iStrategy User G... 12:11 PM

D.3 Removing a Dimension From a Report

To remove dimensions (rows/columns) from reports:

1. click on the row or column label that you want removed
2. click on "Hide"

Alternatively, to keep only one dimension:

1. click on the row or column label that you want to keep
2. click on "Show Only"

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tschehr

Current Registration Term: Spring 09 Reporting

ProClarity™ analytics server

Guided Analysis > Reports > Status

Term: Spring 09 Reporting Academic Level Student: All Academic Levels

Data Layout

How do I...
 • Arrange items on rows and columns?
 • Swap rows and columns?
 • Add members of a hierarchy?
 • Create a drop-down menu (slider)?

Rows
Class Level (16 items)

Columns
Measures (4 items)

Background
 Enrolled Indicator (Enrolled)
 Full Time Part Time Indicator
 Term (Set: Current Registration Term)
 Academic Program
 Academic Program CIP Code
 Academic Program Degree

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	6,014	6,124	2.98	11.80
Graduate	2,346	2,456	3.19	6.76
GRADUATE	2,346	2,456	3.19	6.76
Undergraduate	3,621	3,621	2.92	15.34
FRESHMAN	1,045	1,045	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88
Unknown	47	47	3.78	3.04
Unknown	47	47	3.78	3.04

Hide Unknown

Trusted sites

1:55 PM

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tschehr

Current Registration Term: Spring 09 Reporting

ProClarity™ analytics server

Guided Analysis > Reports > Status

Term: Spring 09 Reporting Academic Level Student: All Academic Levels

Data Layout

How do I...
 • Arrange items on rows and columns?
 • Swap rows and columns?
 • Add members of a hierarchy?
 • Create a drop-down menu (slider)?

Rows
Class Level (16 items)

Columns
Measures (4 items)

Background
 Enrolled Indicator (Enrolled)
 Full Time Part Time Indicator
 Term (Set: Current Registration Term)
 Academic Program
 Academic Program CIP Code
 Academic Program Degree

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	24	24	2.98	11.80
Graduate	56	56	3.19	6.76
GRADUATE	56	56	3.19	6.76
Undergraduate	21	21	2.92	15.34
FRESHMAN	45	45	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88
Unknown	47	47	3.78	3.04
Unknown	47	47	3.78	3.04

Show Only Distinct Student Count

Trusted sites

1:57 PM

D.4 Adding a Dimension to a Report

There are two ways to add dimensions to a report. One is to nest dimensions on either the rows or columns and the other is to add a page filter drop-down menu.

Nesting dimensions

1. click on the "Data Layout" tab at the top of the report
2. in the left menu pane select the dimension that you want from the "Background" list
3. click the up button until the dimension is in the location that you want (rows/columns)
4. click the "Apply" button that is at the top of the left menu pane
5. click the arrow in the label of the new dimension to "Drill Down to all _____ Indicators"

The screenshot shows the HigherEd Analytics application in a Windows Internet Explorer browser. The interface includes a navigation pane on the left with sections for 'Rows', 'Columns', and 'Background'. The 'Background' section lists dimensions such as 'Enrolled Indicator (Enrolled)', 'Full Time Part Time Indicator', 'Term (Set: Current Registration)', 'Academic Program', 'Academic Program CIP Code', and 'Academic Program Degree'. The 'Up' button in the 'Rows' section is highlighted with a green circle. The main table displays data for 'Spring 09 Reporting' with columns for 'Distinct Student Count', 'Enrolled Student Term Count', 'Avg GPA Cum', and 'Avg Credits Attempted'. The table lists various academic levels and their corresponding counts and averages.

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	6,014	6,124	2.98	11.80
Graduate	2,346	2,456	3.19	6.76
GRADUATE	2,346	2,456	3.19	6.76
Undergraduate	3,621	3,621	2.92	15.34
FRESHMAN	1,045	1,045	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88
Unknown	47	47	3.78	3.04
Unknown	47	47	3.78	3.04

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tschehr

Current Registration Term: Spring 09 Reporting

Thursday March 12, 2009

Contents Navigation Data Layout View Sort Filter

Libraries > Admissions and Enrollment Reports > 02 Enrollment > Current Enrollment > Enrollment by Class Level > Distinct Student Count for Enrolled, Spring 09 Reporting

Data Layout Apply

Terms: Spring 09 Reporting Academic Level Student: All Academic Levels

How do I... More help

- Arrange items on rows and columns?
- Swap rows and columns?
- Add members of a hierarchy?
- Create a drop-down menu (slicer)?

Rows

Class Level (16 items)

Columns

Measures (4 items)

Full Time Part Time Ind

Background

Enrolled Indicator (Enrolled)

Term (Set: Current Registrat)

Academic Program

Academic Program CIP Code

Academic Program Degree

Academic Program Primary De

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	6,014	6,124	2.98	11.80
Graduate	2,346	2,456	3.19	6.76
GRADUATE	2,346	2,456	3.19	6.76
Undergraduate	3,621	3,621	2.92	15.34
FRESHMAN	1,045	1,045	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88
Unknown	47	47	3.78	3.04
Unknown	47	47	3.78	3.04

start

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Trusted sites

100%

2:07 PM

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tschehr

Current Registration Term: Spring 09 Reporting

Thursday March 12, 2009

Contents Navigation Data Layout View Sort Filter

Libraries > Current Enrollment > Enrollment by Class Level > Distinct Student Count, Enrolled Student Term Count, Avg GPA Cum, Avg Credits Attempted for Enrolled, Spring 09 Reporting

Data Layout Apply

Terms: Spring 09 Reporting Academic Level Student: All Academic Levels

How do I... More help

- Arrange items on rows and columns?
- Swap rows and columns?
- Add members of a hierarchy?
- Create a drop-down menu (slicer)?

Rows

Class Level (16 items)

Columns

Measures (4 items)

Full Time Part Time Ind

Background

Enrolled Indicator (Enrolled)

Term (Set: Current Registrat)

Academic Program

Academic Program CIP Code

Academic Program Degree

Academic Program Primary De

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum
All Class Levels	6,014	6,124	2.98
Graduate	2,346	2,456	3.19
GRADUATE	2,346	2,456	3.19
Undergraduate	3,621	3,621	2.92
FRESHMAN	1,045	1,045	2.76
JUNIOR	785	785	2.95
SOPHOMORE	887	887	2.95
SENIOR	904	904	2.91
Unknown	47	47	3.78
Unknown	47	47	3.78

Drill Down All Full Time Part Time Indicators

start

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Trusted sites

100%

2:09 PM

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tschehr

Current Registration Term: Spring 09 Reporting

ProClarity analytics server

Term: Spring 09 Reporting Academic Level Student: All Academic Levels

	Distinct Student Count			Enrolled Student Term Count		
	Full Time	Part Time	Unknown	Full Time	Part Time	Unknown
All Class Levels	4,256	1,758		4,366	1,758	
Graduate	676	1,670		786	1,670	
Undergraduate	3,580	41		3,580	41	
FRESHMAN	1,037	8		1,037	8	
JUNIOR	781	4		781	4	
SOPHOMORE	883	4		883	4	
SENIOR	879	25		879	25	
Unknown		47			47	
Unknown		47			47	

Drill Down All Full Time Part Time Indicators

Trusted sites 100%

2:09 PM

Adding a page filter drop-down menu

1. click on the "Data Layout" tab at the top of the report
2. in the left menu pane select the dimension that you want from the "Background" list
3. click the "Slice" button that is at the bottom of the left menu plane (you will notice a little box appears next to the dimension in the background list)
4. click the "Apply" button that is at the top of the left menu pane
5. your new dimension now appears at the top of the report as a new page filter drop down menu

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tschehr ?

Current Registration Term: Spring 09 Reporting

Thursday March 12, 2009

Contents Navigation **Data Layout** View Sort Filter

Client: Current Enrollment > Enrollment by Class Level > Distinct Student Count, Enrolled Student Term Count, Avg GPA Cum, Avg Credits Attempted for Enrolled, Spring 09 Reporting

Term: Spring 09 Reporting Academic Level Student: All Academic Levels

Data Layout

How do I...
 • Arrange items on rows and columns?
 • Swap rows and columns?
 • Add members of a hierarchy?
 • Create a drop-down menu (slider)?

Columns
Measures (4 items)

Background
 Enrolled Indicator (Enrolled)
Full Time Part Time Indicator
 Term (Set: Current Registrat...
 Academic Program
 Academic Program CIP Code
 Academic Program Degree
 Academic Program Primary De
 Academic Program Primary CC

Slice Combine

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	6,014	6,124	2.98	11.80
Graduate	2,346	2,456	3.19	6.76
GRADUATE	2,346	2,456	3.19	6.76
Undergraduate	3,621	3,621	2.92	15.34
FRESHMAN	1,045	1,045	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88
Unknown	47	47	3.78	3.04
Unknown	47	47	3.78	3.04

Done

start 2 Novell Gro... HigherEd Anal... Training and I... HEA iStrategy ... Microsoft ... 2:13 PM

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tschehr ?

Current Registration Term: Spring 09 Reporting

Thursday March 12, 2009

Contents Navigation **Data Layout** View Sort Filter

Client: Current Enrollment > Enrollment by Class Level > Distinct Student Count, Enrolled Student Term Count, Avg GPA Cum, Avg Credits Attempted for Enrolled, Spring 09 Reporting

Term: Spring 09 Reporting Academic Level Student: All Academic Levels

Data Layout

How do I...
 • Arrange items on rows and columns?
 • Swap rows and columns?
 • Add members of a hierarchy?
 • Create a drop-down menu (slider)?

Columns
Measures (4 items)

Background
 Enrolled Indicator (Enrolled)
Full Time Part Time Indicator
 Term (Set: Current Registrat...
 Academic Program
 Academic Program CIP Code
 Academic Program Degree
 Academic Program Primary De
 Academic Program Primary CC

Slice Combine

Apply query for the active tab

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	6,014	6,124	2.98	11.80
Graduate	2,346	2,456	3.19	6.76
GRADUATE	2,346	2,456	3.19	6.76
Undergraduate	3,621	3,621	2.92	15.34
FRESHMAN	1,045	1,045	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88
Unknown	47	47	3.78	3.04
Unknown	47	47	3.78	3.04

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HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tschehr

Current Registration Term: Spring 09 Reporting

ProClarity analytics server

Client: Current Enrollment > Enrollment by Class Level > Distinct Student Count, Enrolled Student Term Count, Avg GPA Cum, Avg Credits Attempted for Enrolled, Spring 09 Reporting

Data Layout

Full Time Part Time Indicator: All Full Time Part Time Indicators

Term: Spring 09 Reporting

Academic Level Student: All Academic

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	6,014	6,124	2.98	11.80
Graduate	2,346	2,456	3.19	6.76
Undergraduate	3,621	3,621	2.92	15.34
FRESHMAN	1,045	1,045	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88
Unknown	47	47	3.78	3.04
Unknown	47	47	3.78	3.04

Background

- Enrolled Indicator (Enrolled)
- Full Time Part Time Indicator
- Term (Set: Current Registrat)
- Academic Program
- Academic Program CIP Code
- Academic Program Degree

D.5 Adjusting the Values in a Page Filter

You may want to adjust the values in a page filter drop down menu. For example, you may want to add terms to the "Term" filter. To do this:

1. click on the "Data Layout" tab at the top of the report
2. in the left menu pane double click on dimension that you want to adjust from the "Background" list, a new "Edit Hierarchy" window will open
3. select the additional items you want to add to the drop down from the "Available Items" list (you can see the detail below subcategories by clicking on the + sign)
4. click the "Add" button between the "Available Items" list and the "Show in View" list
5. your new items will appear in the "Show in View" list
6. click "okay"
7. your new items will appear in the page filter

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tschehr ?

Current Registration Term: Spring 09 Reporting

ProClarity analytics server

Contents Navigation Data Layout View Sort Filter

Client: Current Enrollment > Enrollment by Class Level > Distinct Student Count, Enrolled Student Term Count, Avg GPA Cum, Avg Credits Attempted for Enrolled, Spring 09 Reporting

Data Layout

How do I... More help

- Arrange items on rows and columns?
- Swap rows and columns?
- Add members of a hierarchy?
- Create a drop-down menu (slider)?

Columns

Measures (4 items)

Background

Enrolled Indicator (Enrolled)

Full Time Part Time Indicator

Term (Set: Current Registration Term)

Academic Program

Academic Program CIP Code

Academic Program Degree

Academic Program Primary Department

Slide Combine

Term: Spring 09 Reporting Academic Level Student: All Academic Levels

Distinct Student Count Enrolled Student Term Count Avg GPA Cum Avg Credits Attempted

11.80 6.76 6.76 15.34 15.26 15.67 15.61 14.88 3.04 3.04

Edit Hierarchy

Hierarchy: Term

Browse Search Shared Items

Available items:

- Default (All Terms)
- All Terms
- Set: Current Admissions Term
- Set: Current Registration Term
- Set: Last Completed Term
- Set: Last 4 Academic Years (Current Reporting)
- Set: Last 4 Academic Years (Last Completed)
- Set: Last 4 Fall Terms (Current Reporting)
- Set: Last 4 Fall Terms (Last Completed)
- Set: Last 4 Spring Terms (Current Reporting)
- Set: Last 4 Spring Terms (Last Completed)
- Set: Last 3 Fall Terms (Current Reporting)

Add Remove Remove All

Show in view:

Set: Current Registration Term

OK Cancel

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tschehr ?

Current Registration Term: Spring 09 Reporting

ProClarity analytics server

Contents Navigation Data Layout View Sort Filter

Client: Current Enrollment > Enrollment by Class Level > Distinct Student Count, Enrolled Student Term Count, Avg GPA Cum, Avg Credits Attempted for Enrolled, Spring 09 Reporting

Data Layout

How do I... More help

- Arrange items on rows and columns?
- Swap rows and columns?
- Add members of a hierarchy?
- Create a drop-down menu (slider)?

Columns

Measures (4 items)

Background

Enrolled Indicator (Enrolled)

Full Time Part Time Indicator

Term (Set: Current Registration Term)

Academic Program

Academic Program CIP Code

Academic Program Degree

Academic Program Primary Department

Slide Combine

Term: Spring 09 Reporting Academic Level Student: All Academic Levels

Distinct Student Count Enrolled Student Term Count Avg GPA Cum Avg Credits Attempted

11.80 6.76 6.76 15.34 15.26 15.67 15.61 14.88 3.04 3.04

Edit Hierarchy

Hierarchy: Term

Browse Search Shared Items

Available items:

- Set: Last 4 Academic Years (Current Reporting)
- Set: Last 4 Academic Years (Last Completed)
- Set: Last 4 Fall Terms (Current Reporting)
- Fall 05 Reporting
- Fall 06 Reporting
- Child Care Fall 2006
- Fall 07 Reporting
- Child Care Fall 2007
- Fall 08 Reporting
- Child Care Fall 2008
- Set: Last 4 Fall Terms (Last Completed)
- Set: Last 4 Spring Terms (Current Reporting)

Add Remove Remove All

Show in view:

Set: Current Registration Term

OK Cancel

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tschehr ? Home - HEA

Current Registration Term: Spring 09 Reporting

Thursday March 12, 2009

Contents Navigation

Home > Current Enrollment > Data Layout

How do I...
• Arrange items on rows and columns?
• Swap rows and columns?
• Add members of a hierarchy?
• Create a drop-down menu (slicer)?

Rows
Class Level (16 items)

Columns
Measures (4 items)

Background
Enrolled Indicator (Enrolled)
Full Time Part Time Indicator
Term (Set: Current Registration Term)
Academic Program
Academic Program CIP Code
Academic Program Degree

Edit Hierarchy

Hierarchy: Term

Available items:

- Set: Last 4 Academic Years (Current)
- Set: Last 4 Academic Years (Last)
- Set: Last 4 Fall Terms (Current R
- Fall 05 Reporting
- Fall 06 Reporting
- Child Care Fall 2006
- Fall 07 Reporting
- Child Care Fall 2007
- Fall 08 Reporting
- Child Care Fall 2008
- Set: Last 4 Fall Terms (Last Comp
- Set: Last 4 Spring Terms (Current

Add

Remove

Remove All

Show in view:

- Set: Current Registration Term
- Set: Set: Last 4 Fall Terms (Current

OK Cancel

Done

start

Novell Gro... Internet E... OUTLoyola HEA iStrategy ... Microsoft ... 2:41 PM

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tschehr ? Home - HEA

Current Registration Term: Spring 09 Reporting

Thursday March 12, 2009

Contents Navigation Data Layout View Sort Filter

Home > Current Enrollment > Enrollment by Class Level > Display Student Count, Enrolled Student Term Count, Avg GPA Cum, Avg Credits Attempted for Enrolled, Fall 05 Reporting

Data Layout

How do I...
• Arrange items on rows and columns?
• Swap rows and columns?
• Add members of a hierarchy?
• Create a drop-down menu (slicer)?

Rows
Class Level (16 items)

Columns
Measures (4 items)

Background
Enrolled Indicator (Enrolled)
Full Time Part Time Indicator
Term (2 items)
Academic Program
Academic Program CIP Code
Academic Program Degree

Term: Fall 05 Reporting Academic Level Student: All Academic Levels

	Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
Fall 05 Reporting	6,241	6,357	2.96	11.39
Fall 06 Reporting	6,241	6,357	2.96	11.39
Child Care Fall 2006	6,241	6,357	2.96	11.39
Fall 07 Reporting	6,241	6,357	2.96	11.39
Child Care Fall 2007	6,241	6,357	2.96	11.39
Fall 08 Reporting	6,241	6,357	2.96	11.39
Child Care Fall 2008	6,241	6,357	2.96	11.39
Spring 09 Reporting	6,241	6,357	2.96	11.39

Click to change sliced member

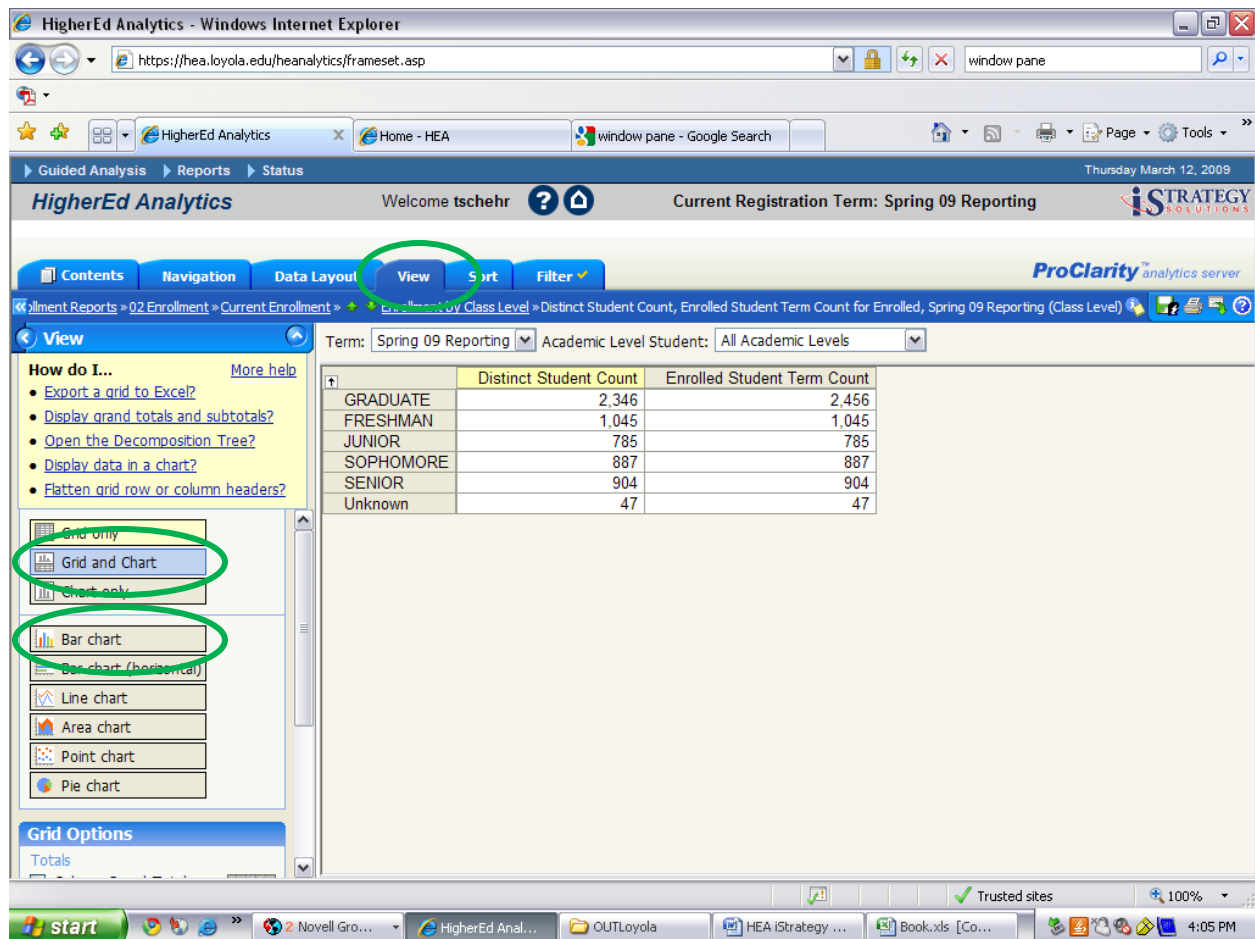
start

Novell Gro... HigherEd Anal... OUTLoyola HEA iStrategy ... Microsoft ... 2:45 PM

E. Creating Charts

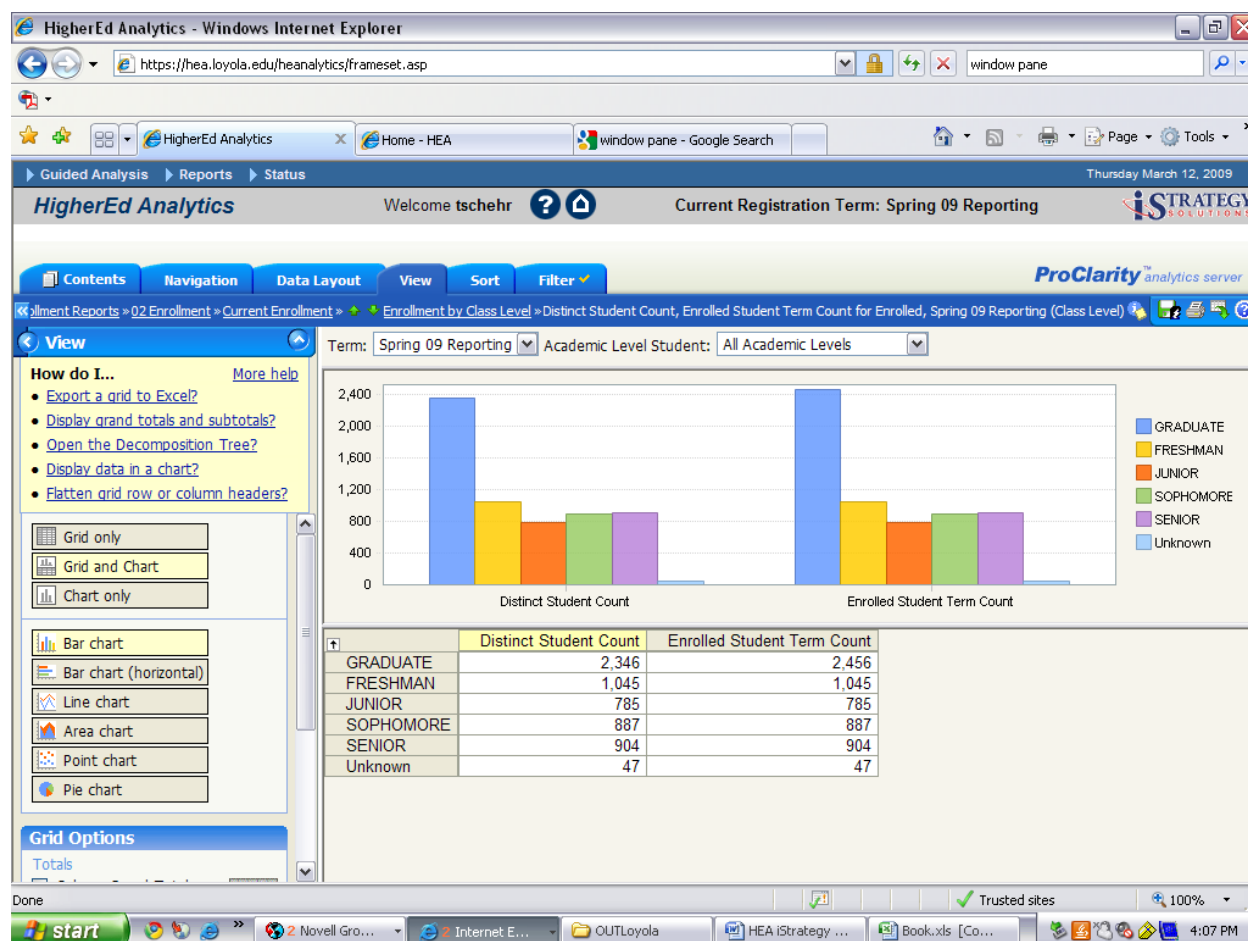
To create charts of data from reports:

1. click on the "View" tab that is at the top of the report
2. Select the display you would like (chart only or grid and chart) and the type of chart that you want from the left menu pane
3. The report will change to the chart that you specified



The screenshot shows the HigherEd Analytics web application interface. The 'View' tab is selected in the top navigation bar. In the left-hand menu, the 'Grid and Chart' option is highlighted. Below this, the 'Bar chart' option is also highlighted. The main content area displays a table with the following data:

	Distinct Student Count	Enrolled Student Term Count
GRADUATE	2,346	2,456
FRESHMAN	1,045	1,045
JUNIOR	785	785
SOPHOMORE	887	887
SENIOR	904	904
Unknown	47	47



F. Help and Information

If you have questions about the ProClarity tool, a data element, or a report in iStrategy, you should first consult the online help and information functions.

ProClarity offers “How do I . . .” tips in the left menu pane. For additional help you can click “More help” in that same pane or on the ? icon that is on the right side next to the export button.

The Help found by clicking on the ? icon that is at the top center of iStrategy contains a complete data dictionary and overview of the data model. *This information may not be helpful to those who are not familiar with field names in Colleague.*

Questions about the contents of individual reports can be found by clicking on the “i” icon that appears at the end of the bread crumb string.

HigherEd Analytics - Windows Internet Explorer

https://hea.loyola.edu/heapanalytics/frameset.asp

HigherEd Analytics

Welcome tscheh

Current Registration Term: Spring 09 Reporting

Thursday March 12, 2009

Contents Navigation Data Layout View Sort Filter

Enrollment by Class Level » Distinct Student Count, Enrolled Student Term Count for Enrolled, Spring 09 Reporting (Class level)

Navigation

How do I... [More help](#)

- [Get started \(run a query\)?](#)
- [Set a navigation mode?](#)
- [Drill down to a specific member?](#)
- [Save my page?](#)

Selected:

All Class Levels

Drill Down Show Only

Drill Up Hide

Collapse

Drill Down to...

Navigation mode:

Drill Down mode

Expand mode

Properties

[none]

Actions

Term: Spring 09 Reporting Academic Level Student: All Academic Levels

	Distinct Student Count	Enrolled Student Term Count	Avg GPA Cum	Avg Credits Attempted
All Class Levels	6,014	6,124	2.98	11.80
Graduate	2,346	2,456	3.19	6.76
GRADUATE	2,346	2,456	3.19	6.76
Undergraduate	3,621	3,621	2.92	15.34
FRESHMAN	1,045	1,045	2.76	15.26
JUNIOR	785	785	2.95	15.67
SOPHOMORE	887	887	2.95	15.61
SENIOR	904	904	2.91	14.88
Unknown	47	47	3.78	3.04
Unknown	47	47	3.78	3.04

Done

start

2 Novell Gro... Internet E... OUTLoyola HEA iStrategy ... Book.xls [Co... 4:10 PM