■ 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

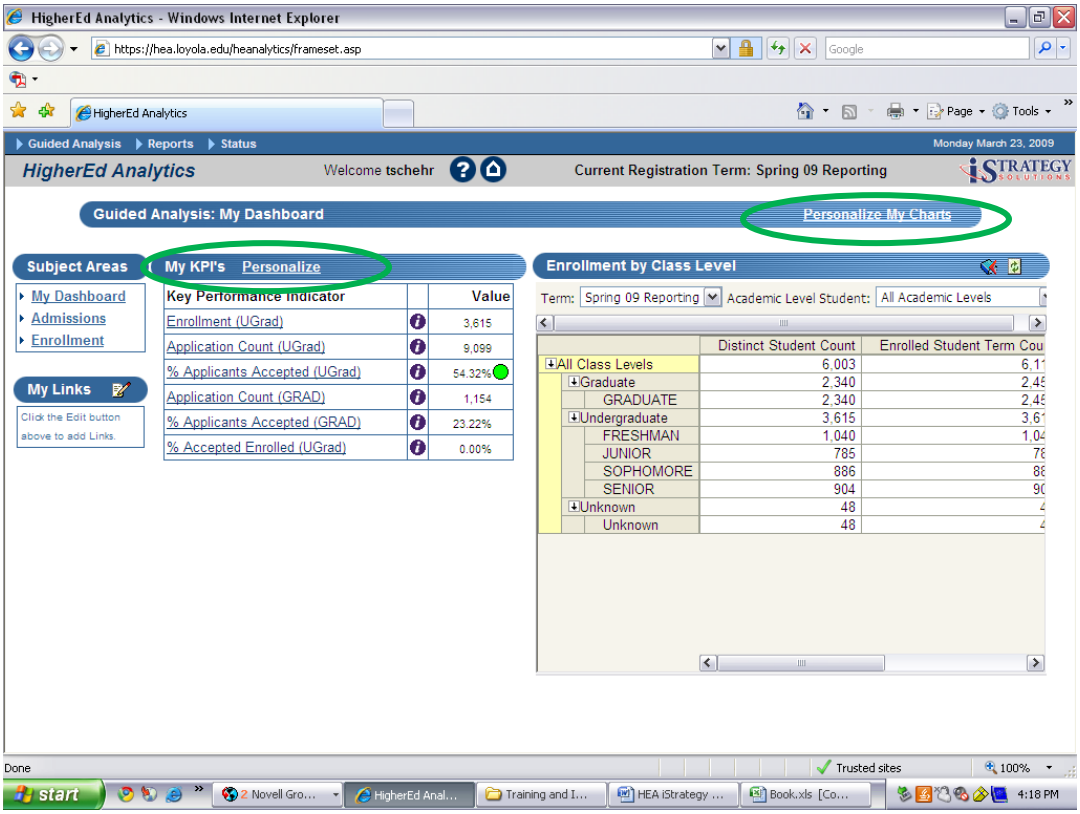
Open an internet browser and type the following in the address bar:

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.



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.

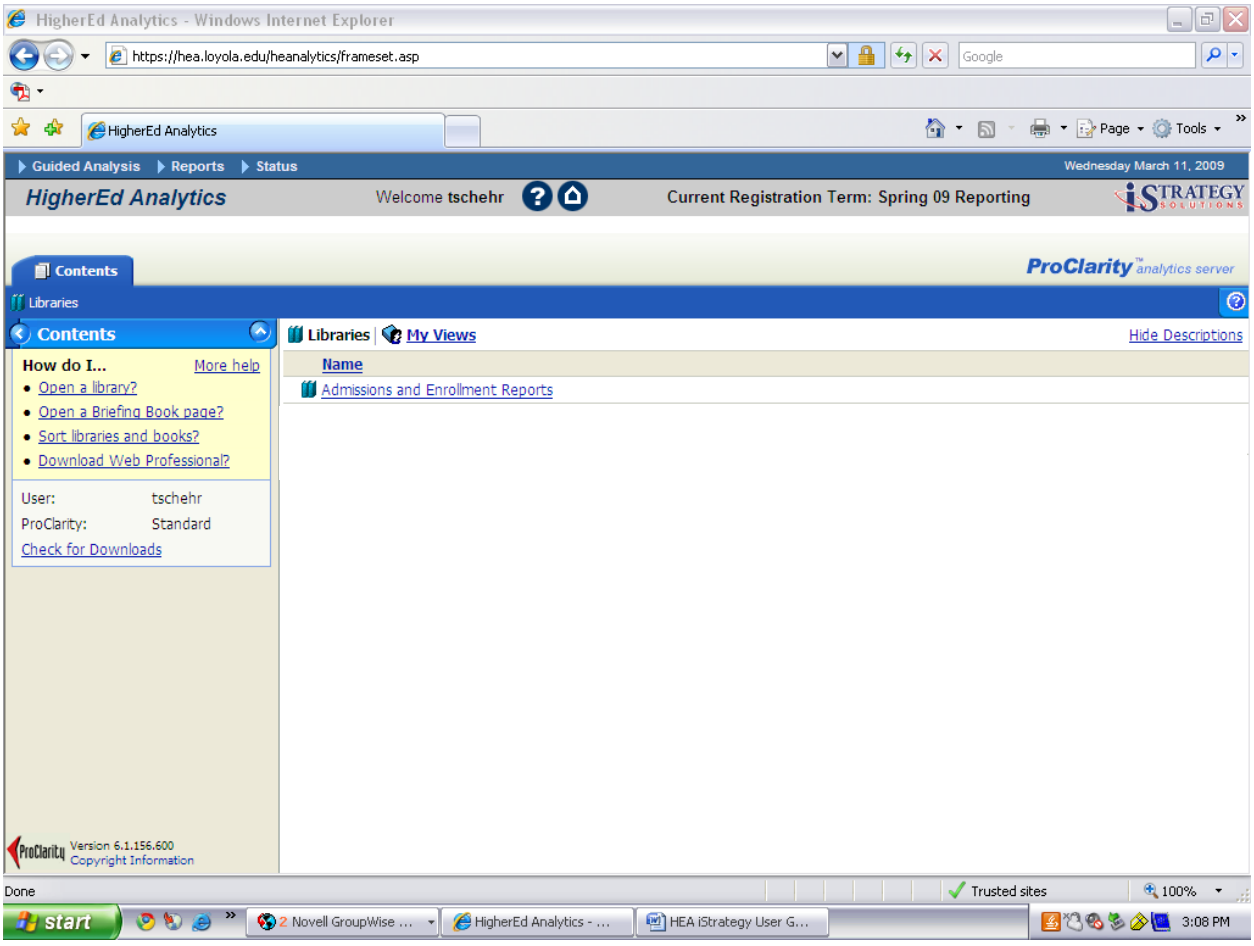
Information on customizing reports and saving new reports for your personal (or shared) use is covered in subsequent sections of this document.

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.

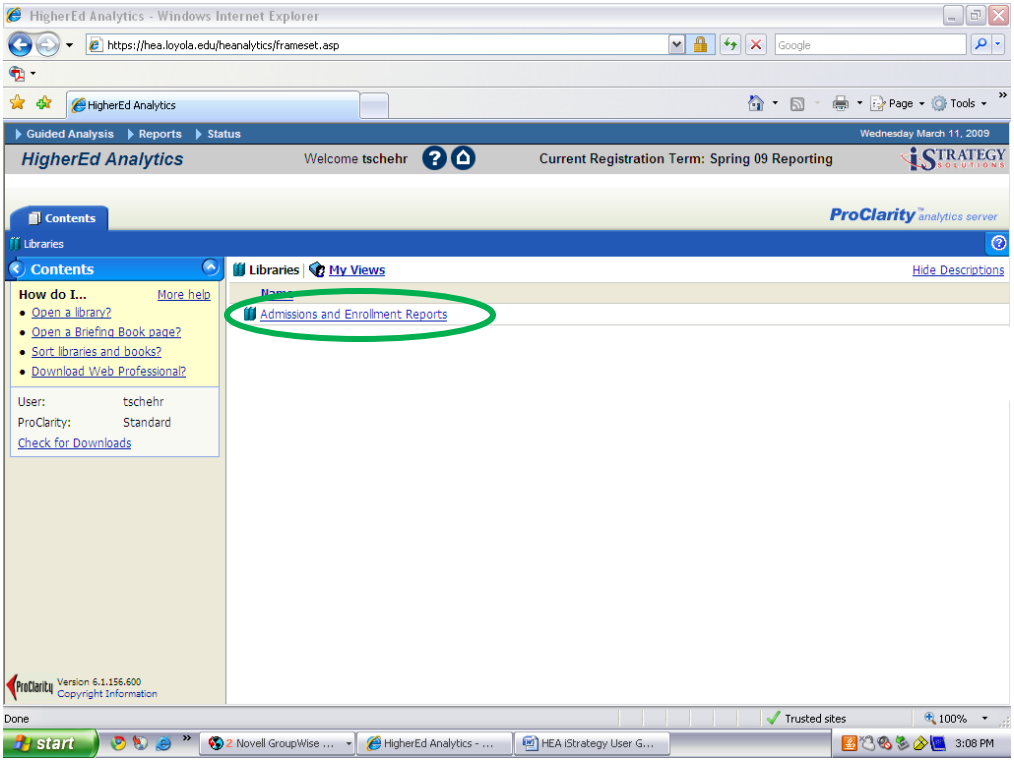
Currently there is one library "Admissions and Enrollment Reports."

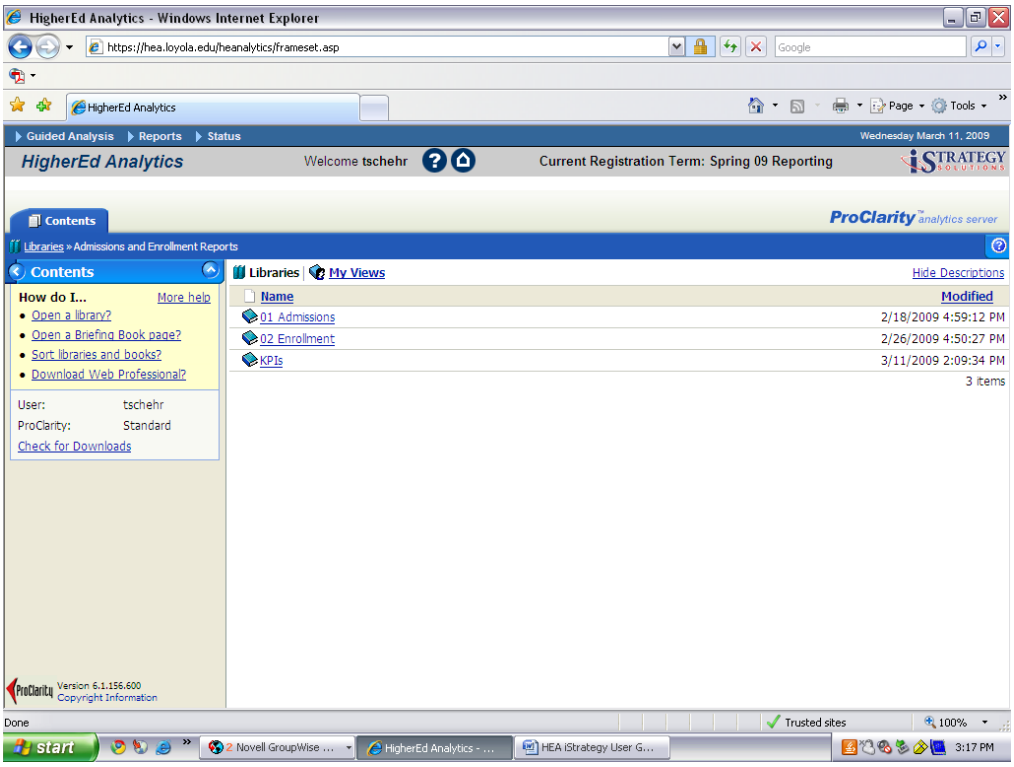
If and when Loyola adopts other data modules, additional libraries will be created.



C.2 Accessing Reporting Briefing Books

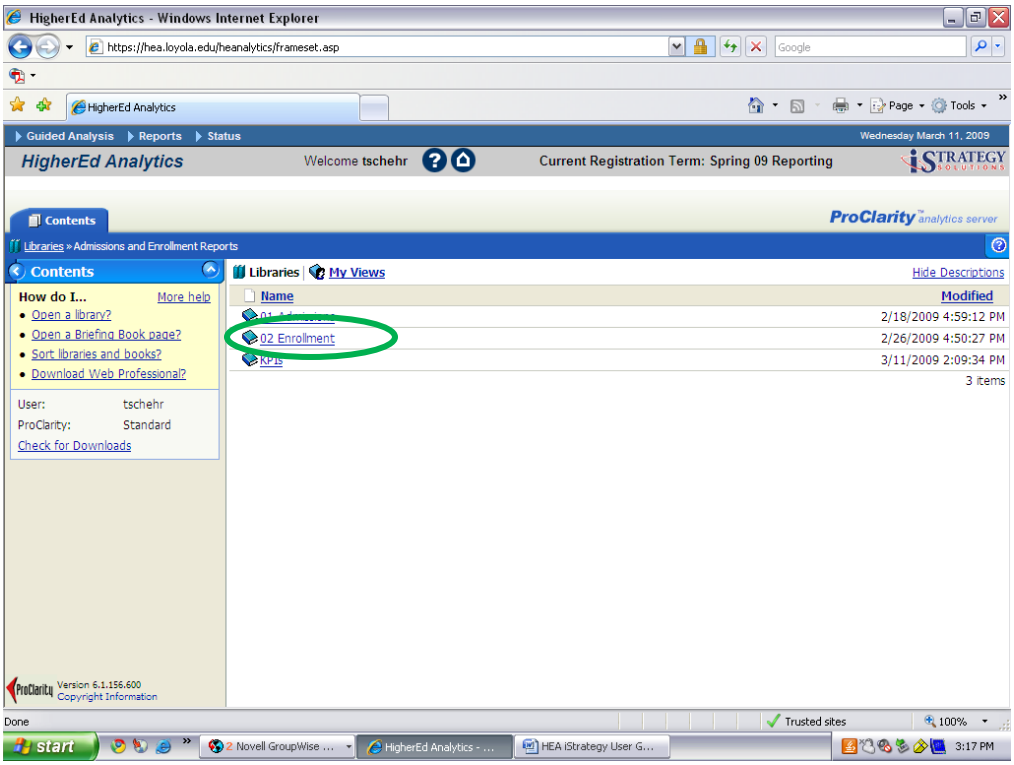
From the Reporting Libraries page, clicking on the library of your choice will open the library to the briefing books.

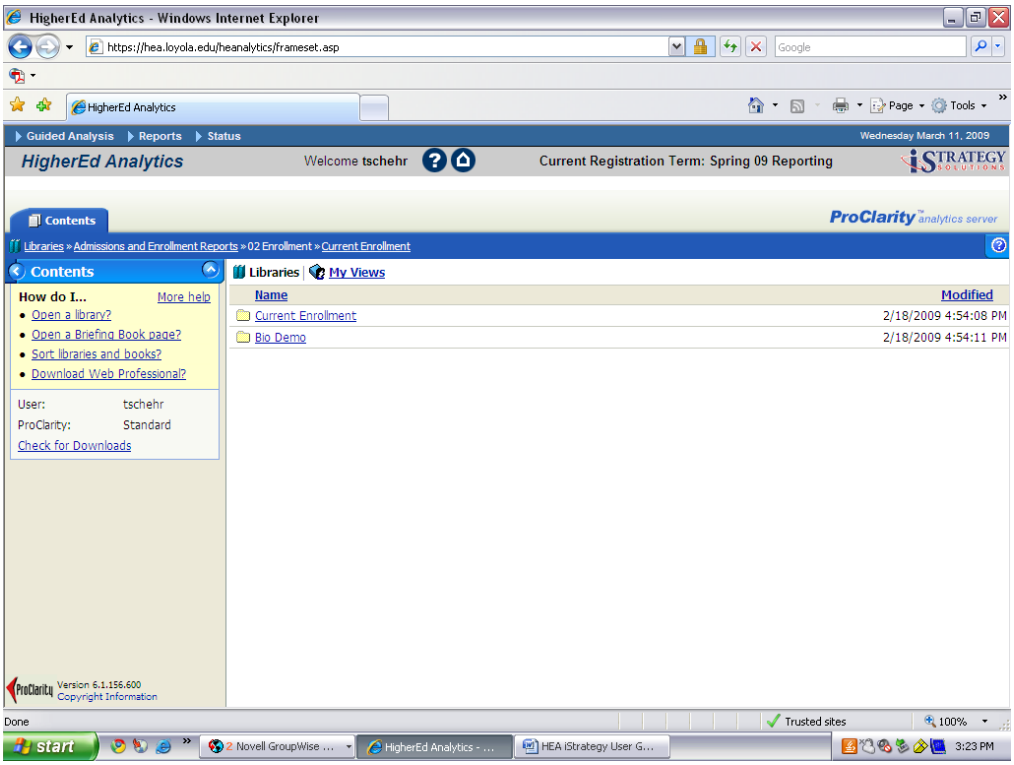




C.3 Accessing and Running Reports

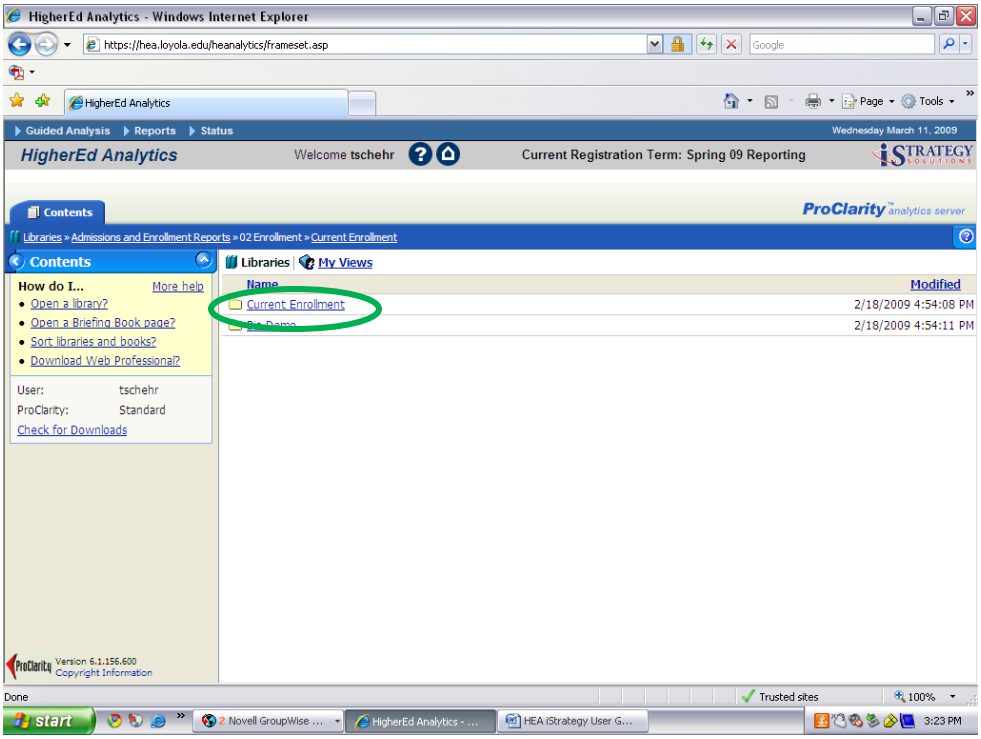
From the Briefing Books page, clicking on the book of your choice will open the book to the folders/reports that it contains.

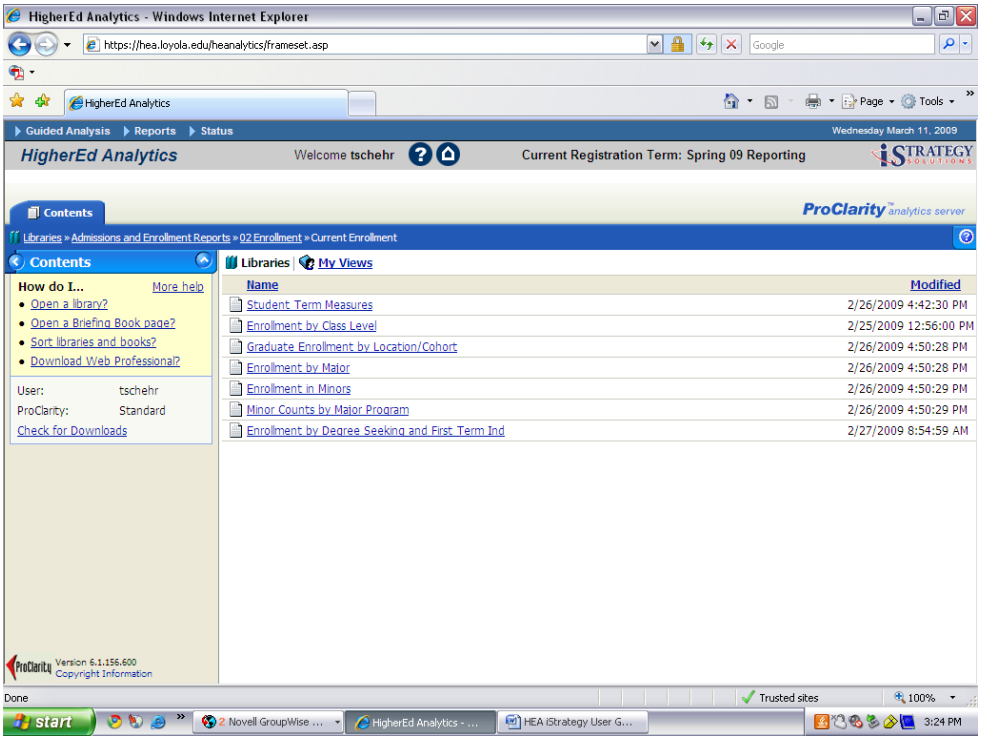




Clicking on a folder will expose the reports it contains.

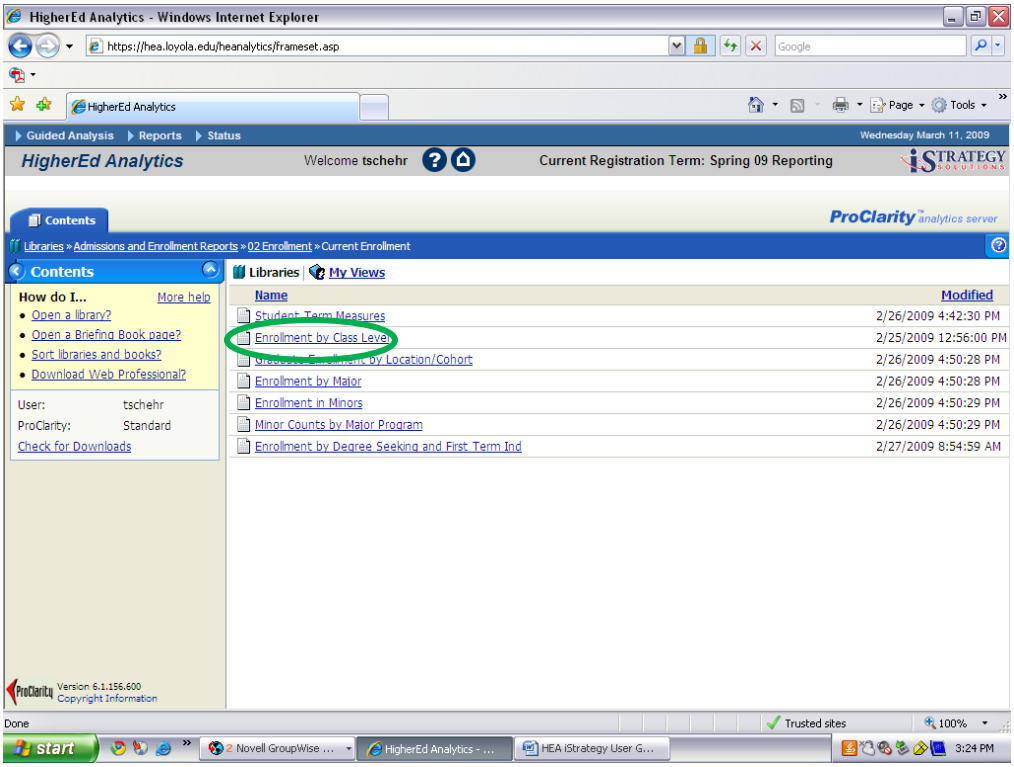
Please note that users have various levels of access to reports and that new institutional reports are added periodically so the reports listed in the screen-shots below may not be exact replicas of what you see when you log into iStrategy.

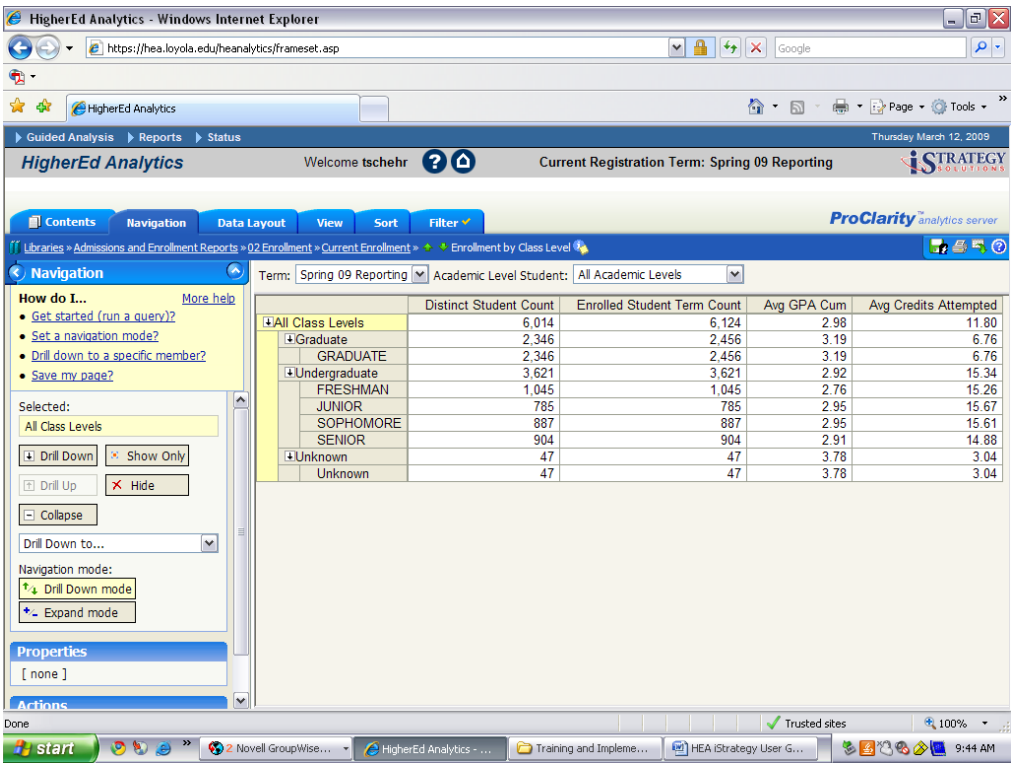




To run a report, simply click on the link.

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

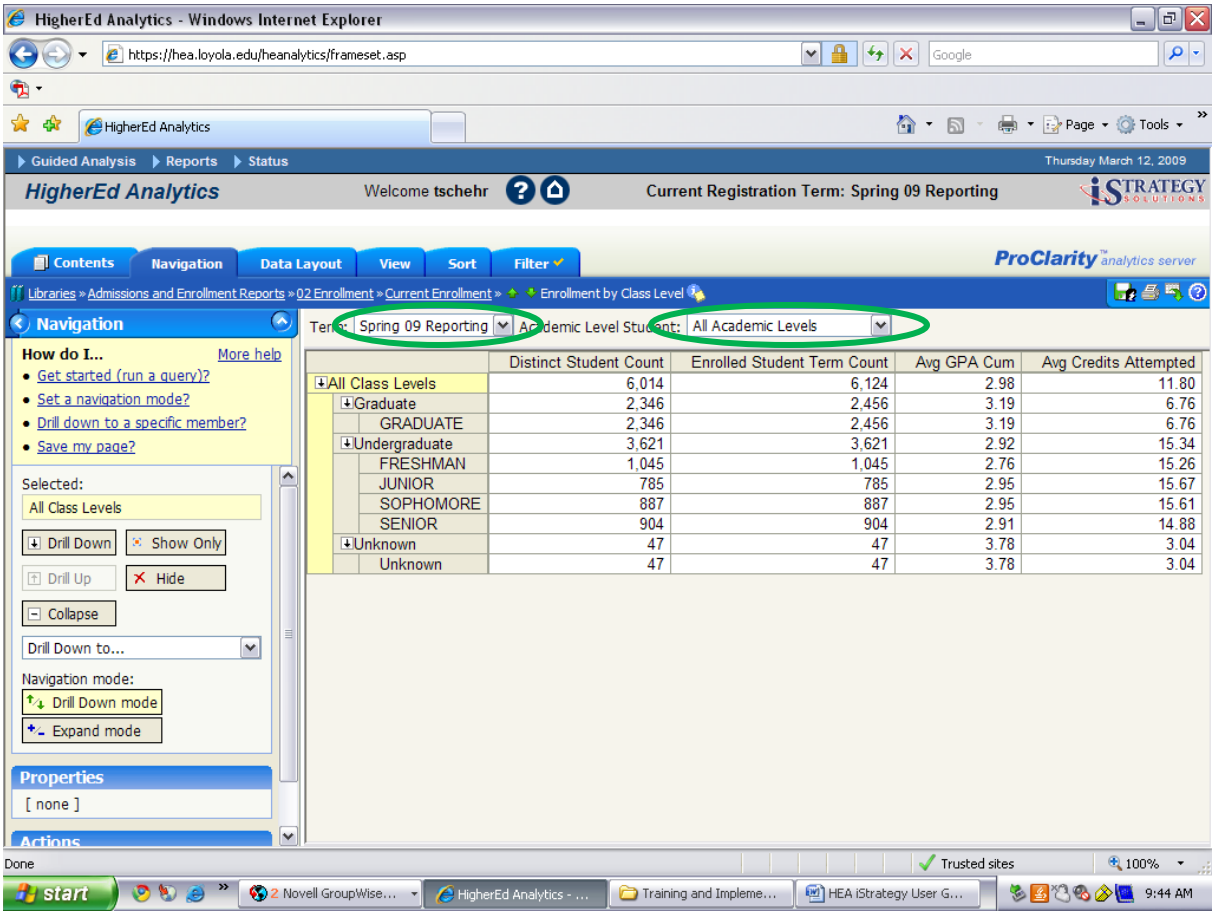




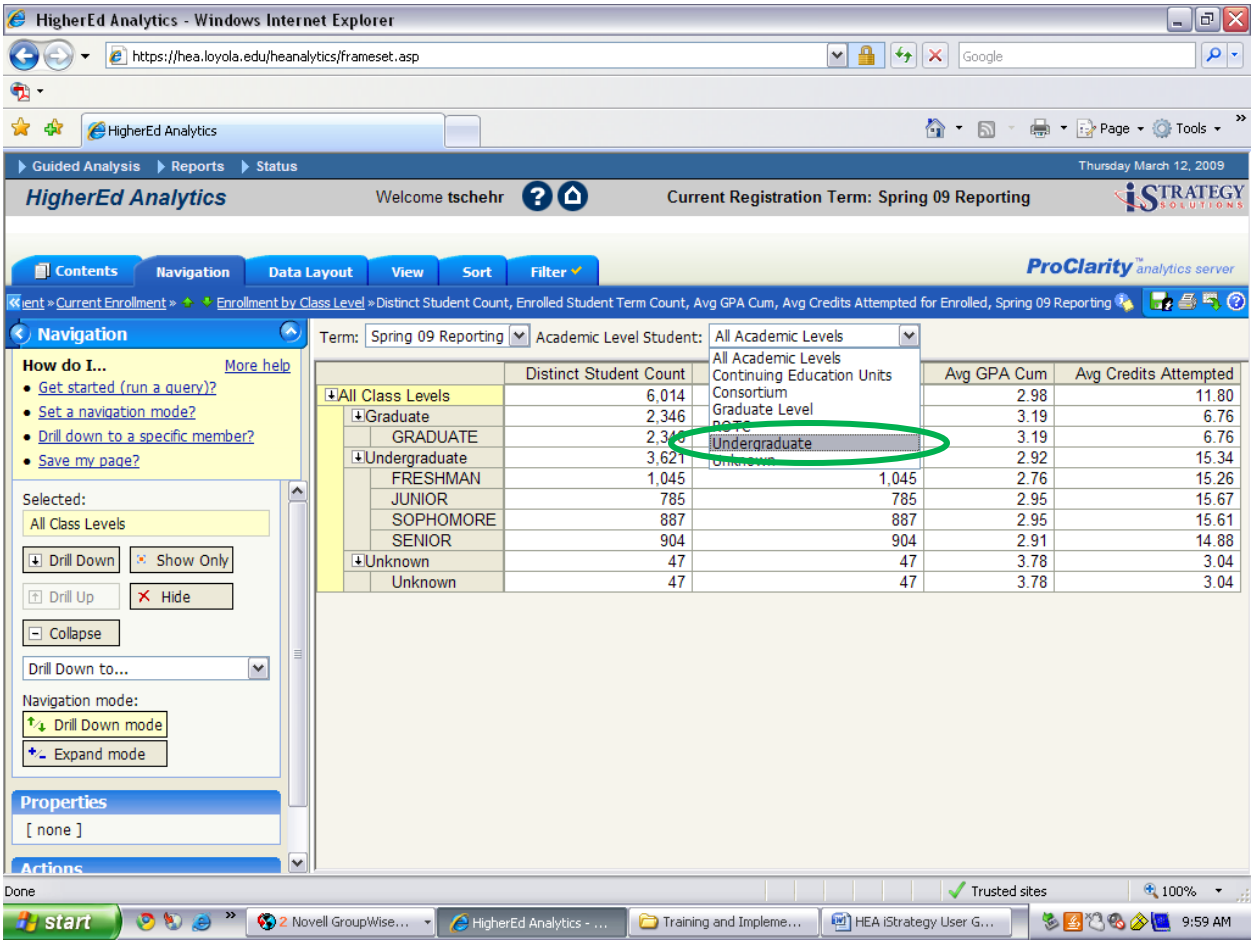
C.3 Filtering Data in Reports

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.



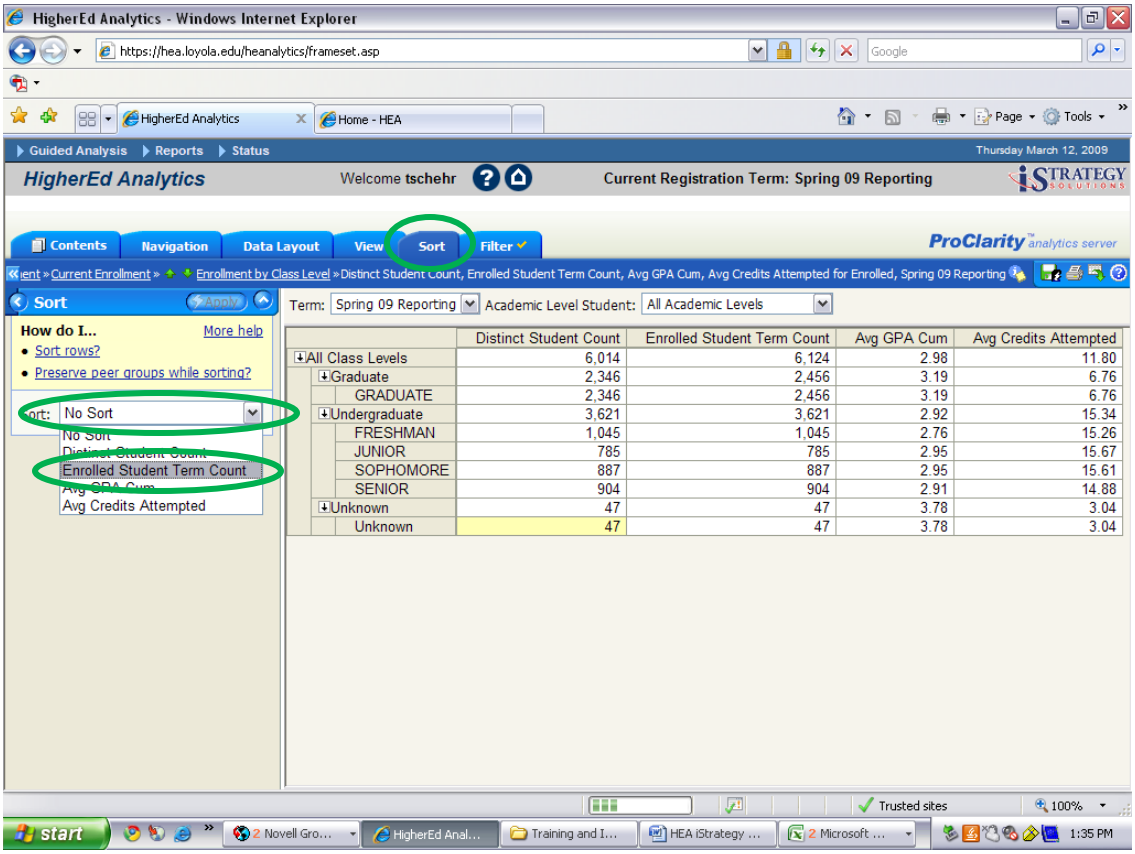
If you want to see the enrollment for undergraduates only, click on the “Academic Level Student” filter and select “Undergraduates.”



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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More help
Sort rows?
Preserve peer groups while sorting?
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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
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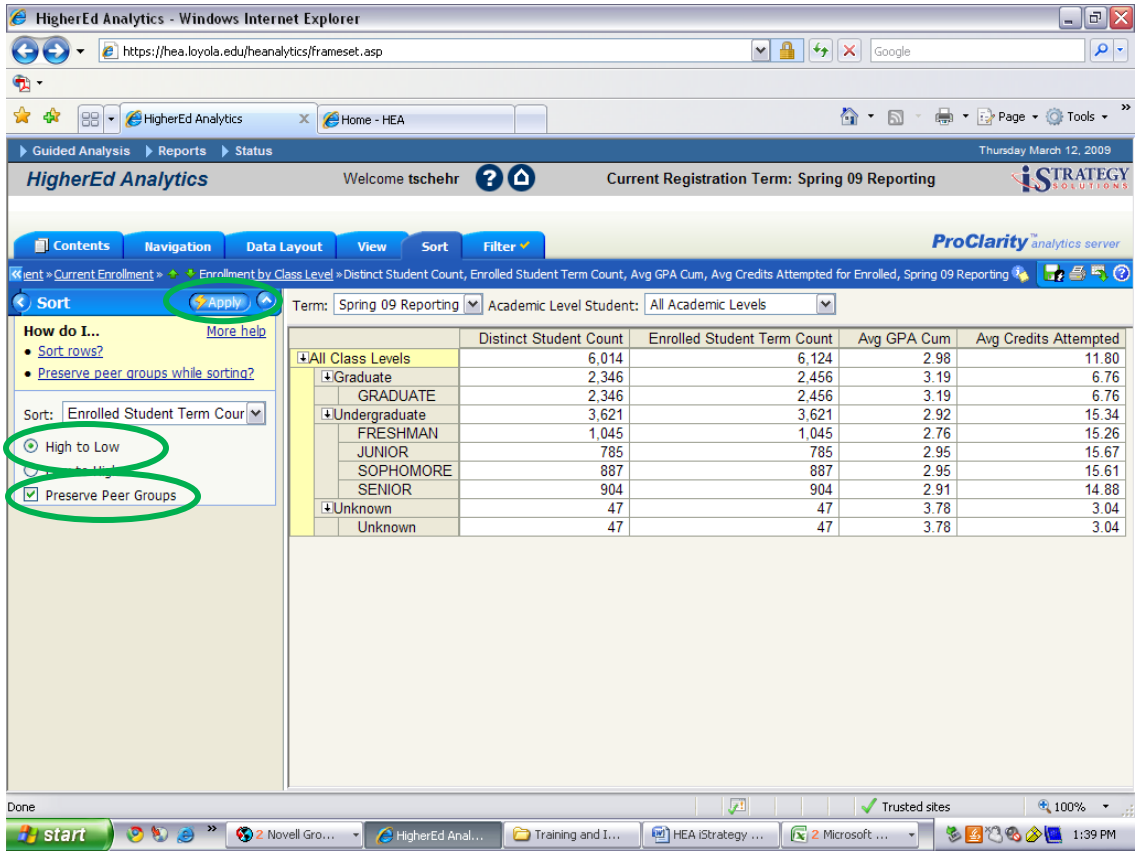
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Sort: Enrolled Student Term Cour
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Term: Spring 09 Reporting
Academic Level Student: All Academic Levels
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Unknown 47 47 3.78 3.04
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C.5 Drilling to Detail

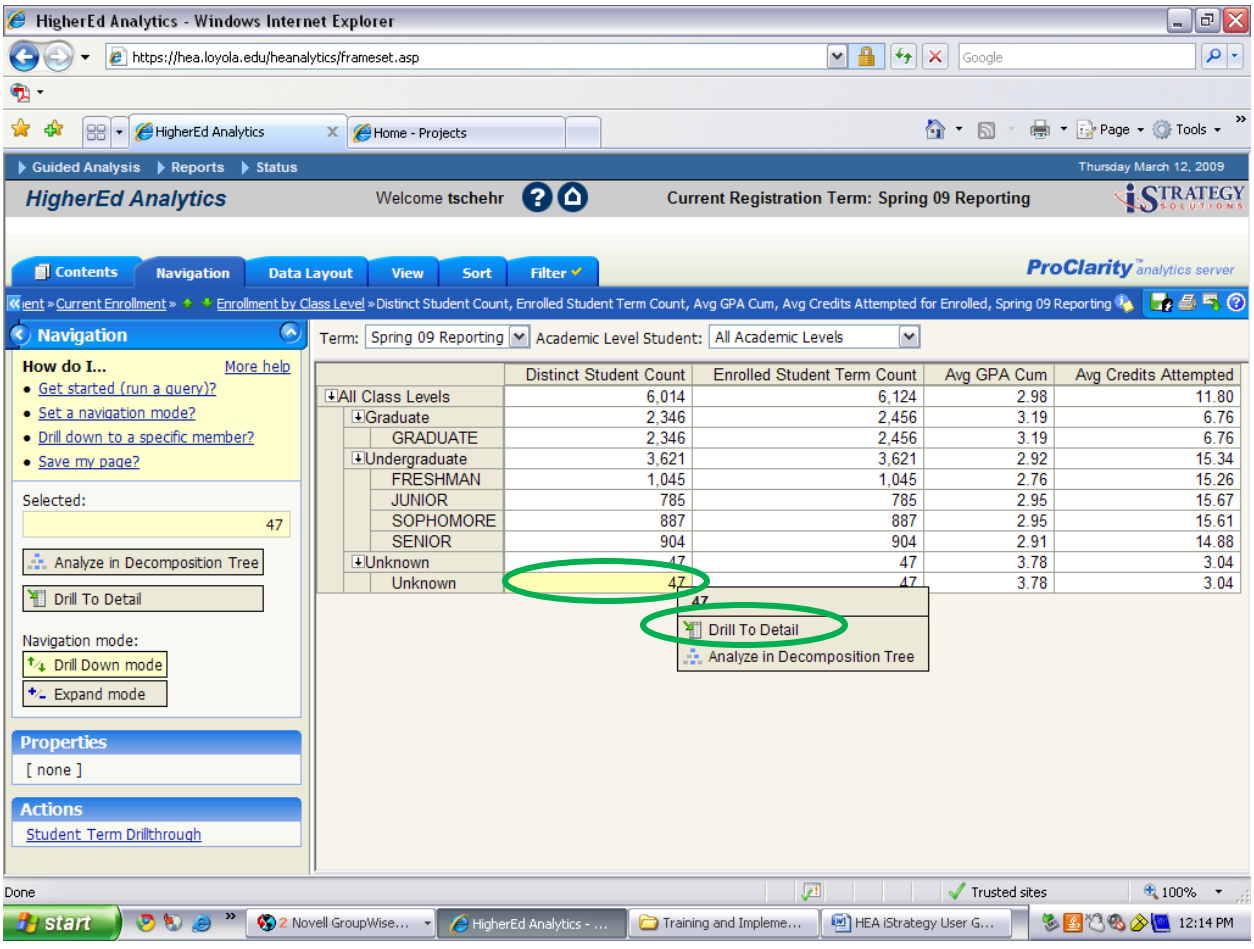
You may want to see the unit-record data underlying a count. In this case, click on the cell with the count in it and click on "Drill to Detail." A new window will open displaying the detailed records related to the selected cell.

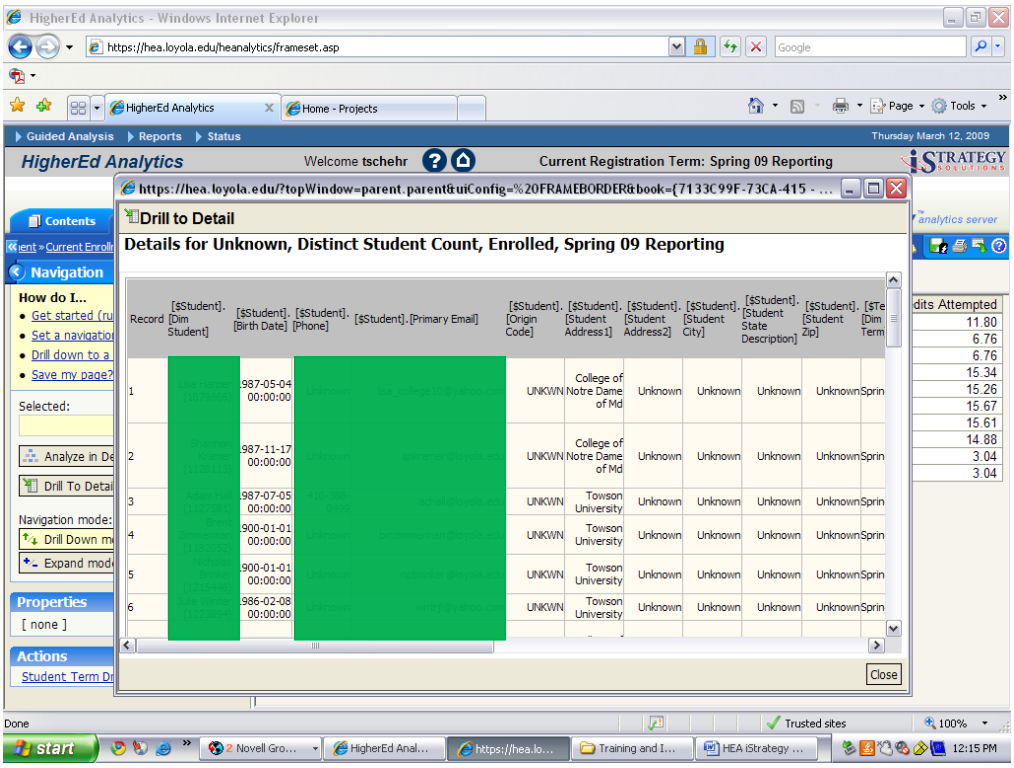
Note: You can only drill to detail on stored measures not on calculated values such as GPA or credit hours.

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 clock on cell A1 and select "Paste"





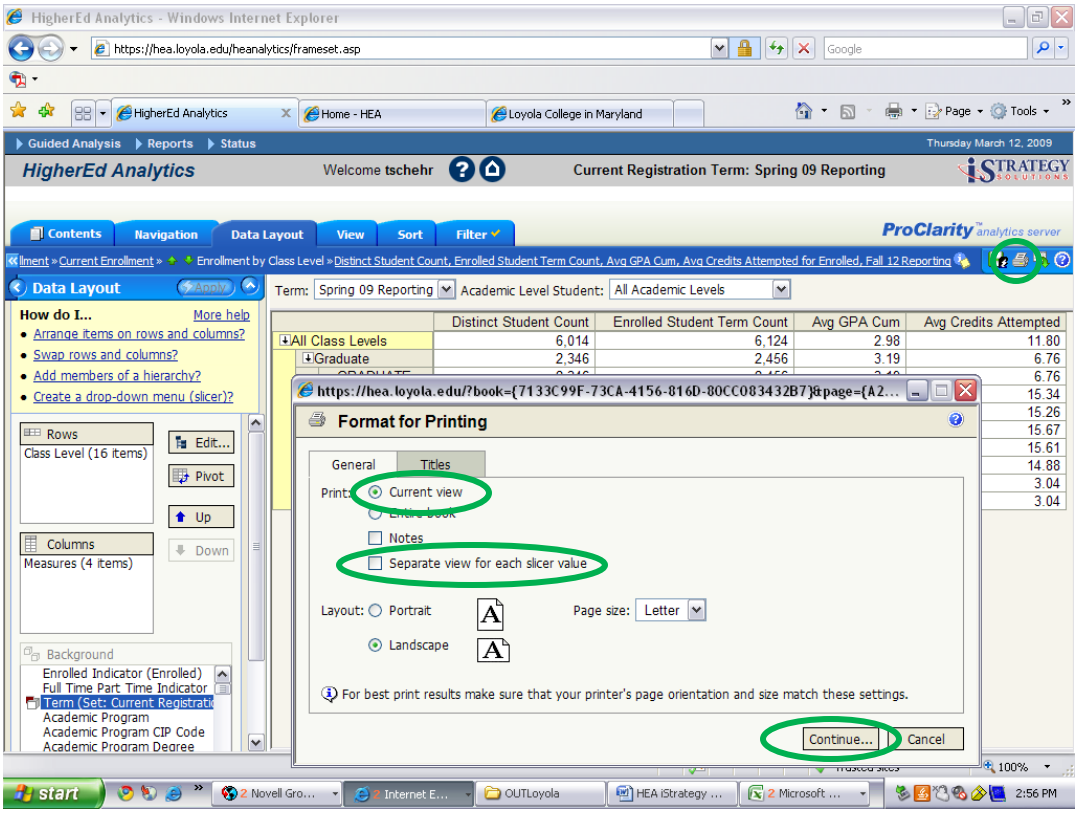
C.6 Printing and Exporting Reports

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.

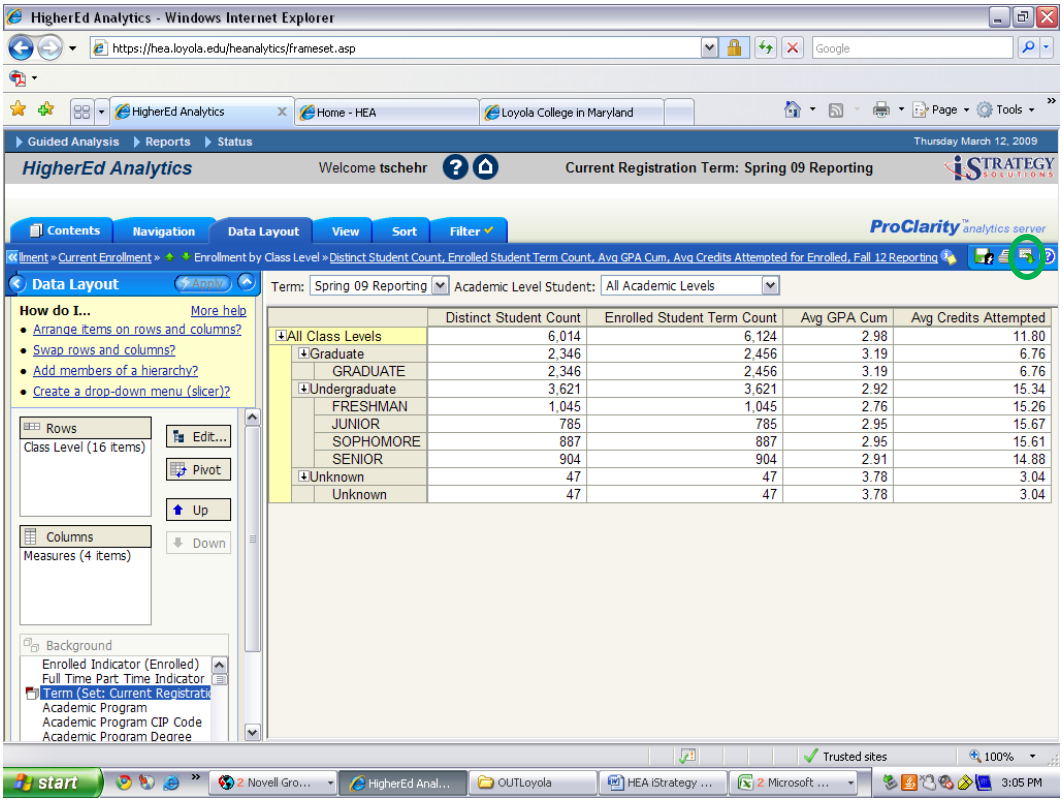
In most cases you will want to use the default setting of “Current View” and deselected “Separate view for each slicer value.”



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.

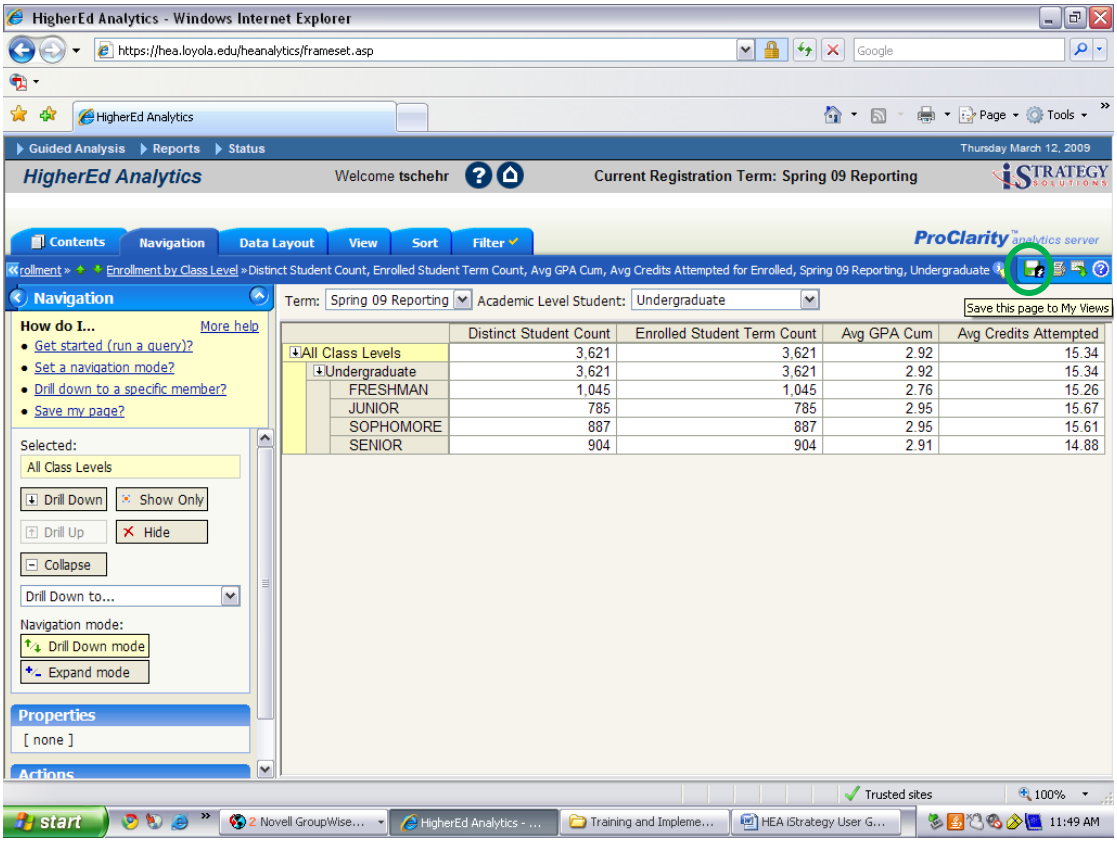


D. Customizing and Saving Reports

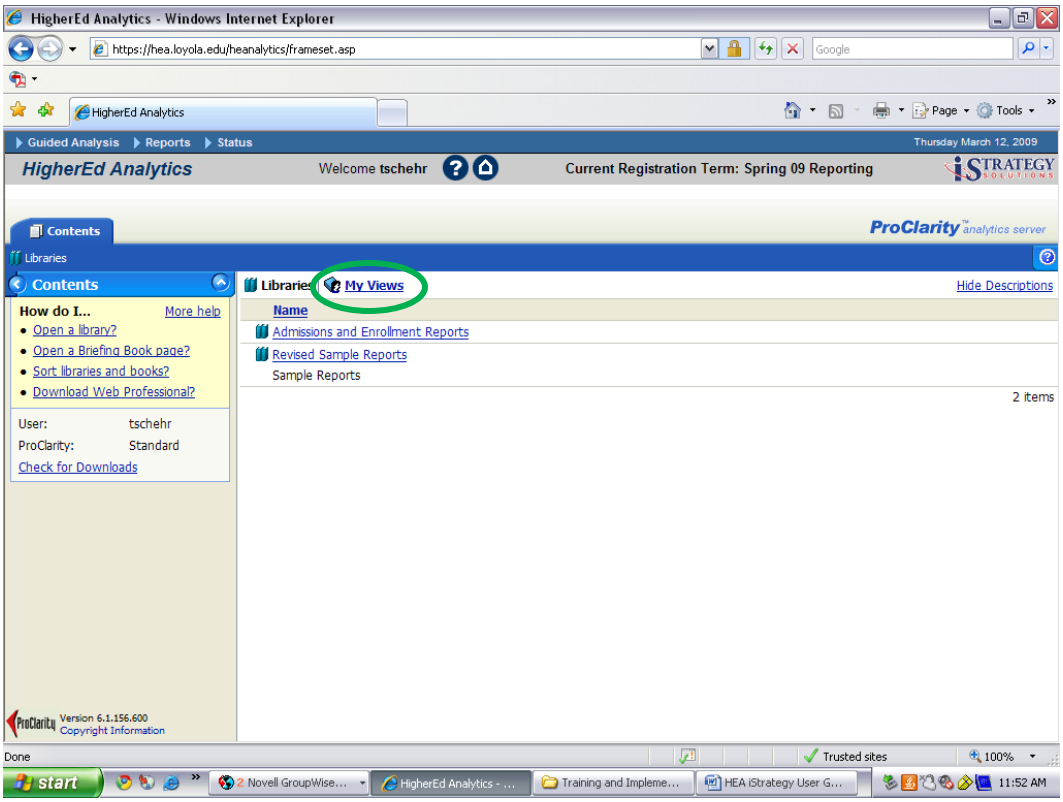
Reports can be customized and saved as a new report in your “My Views” area of the Library.

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.



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



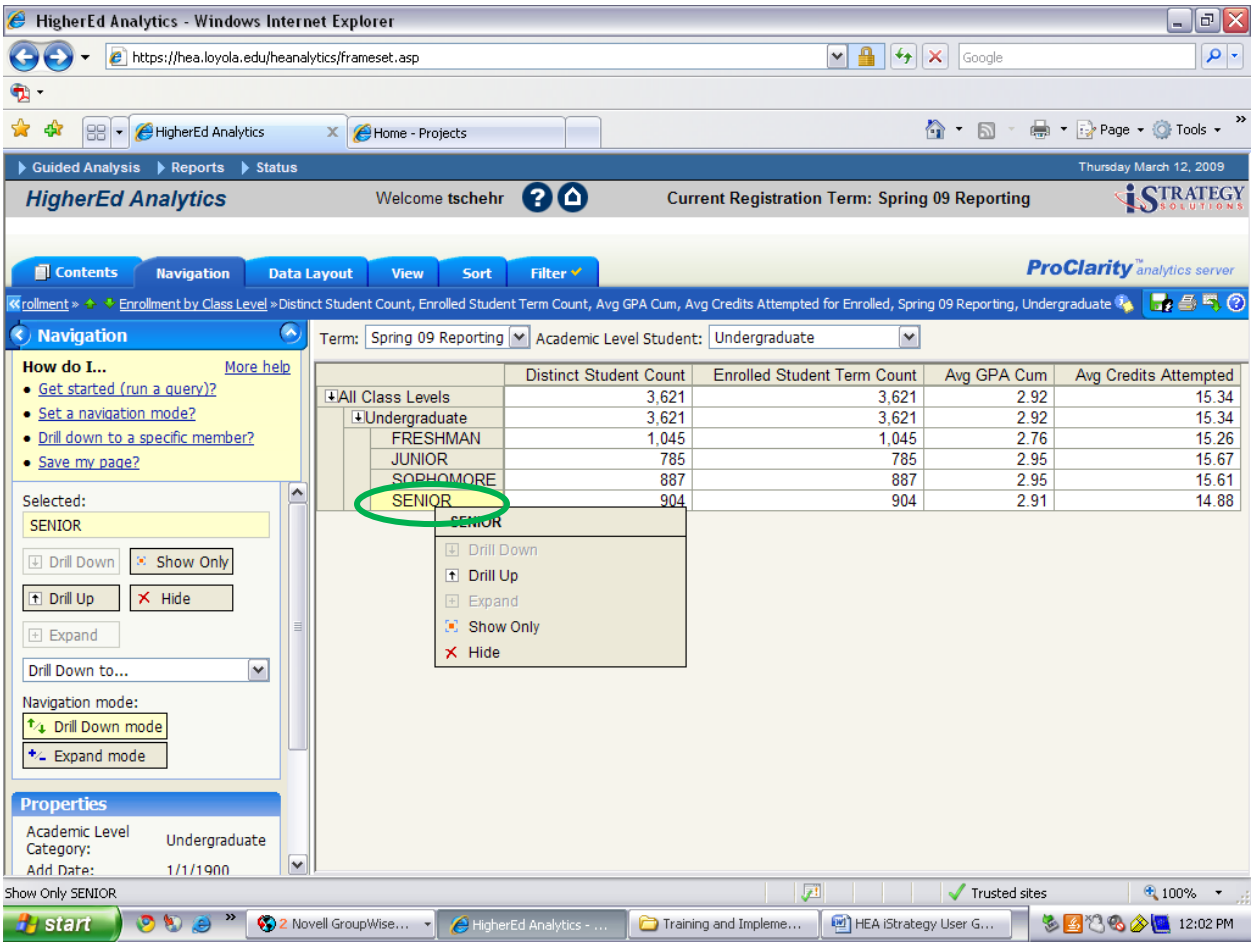
D.2 Drilling to Another Dimension

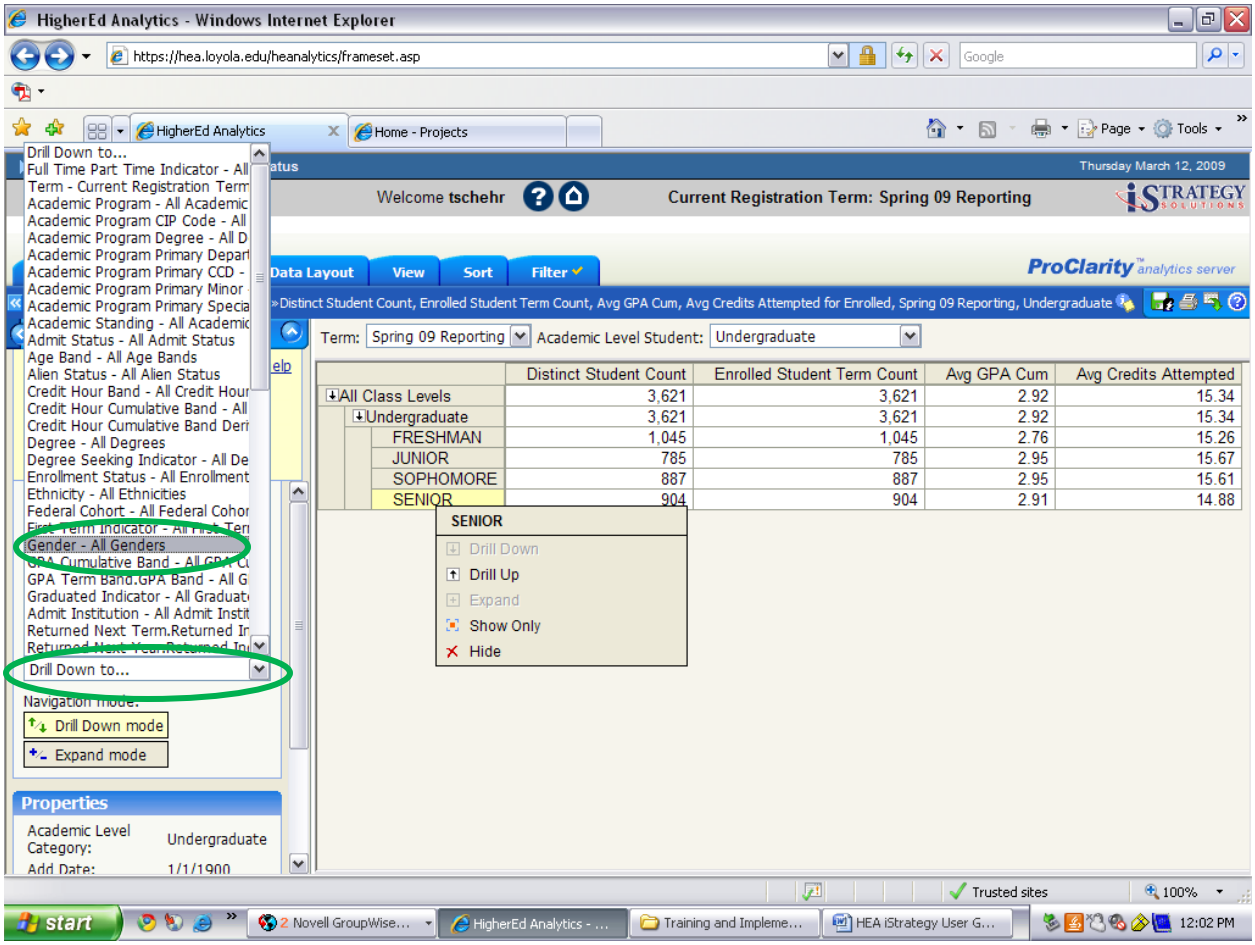
If you want to see a subset of the data in your report disaggregated by another attribute you can drill to detail.

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).”

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Academic Level Student: Undergraduate
Drill Down to...
Gender - All Genders
Navigation mode:
Drill Down mode
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Properties
Academic Level Category: Undergraduate
Add Date: 1/1/1900
Distinct Student Count
Enrolled Student Term Count
Avg GPA Cum
Avg Credits Attempted
All Class Levels 3,621 3,621 2.92 15.34
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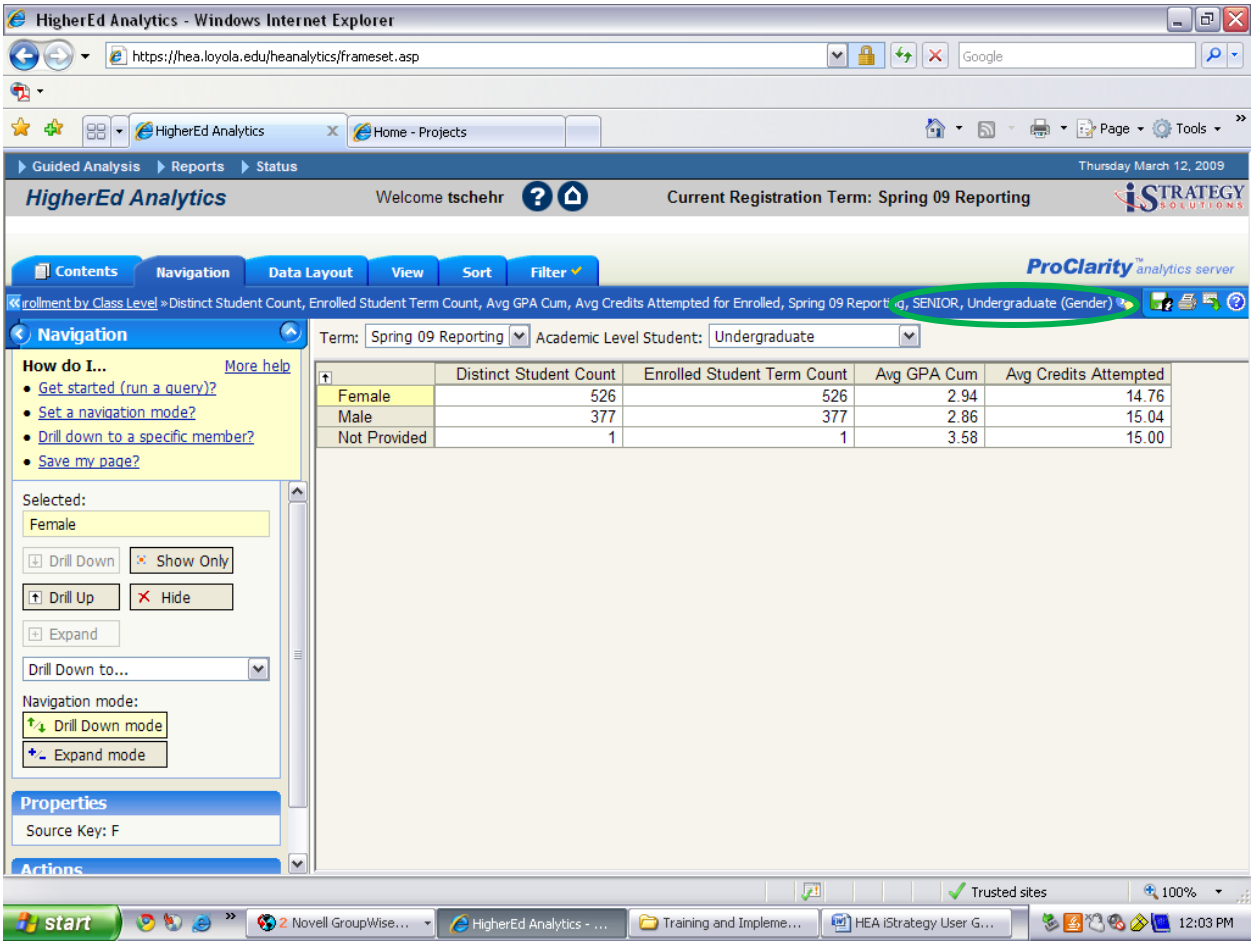
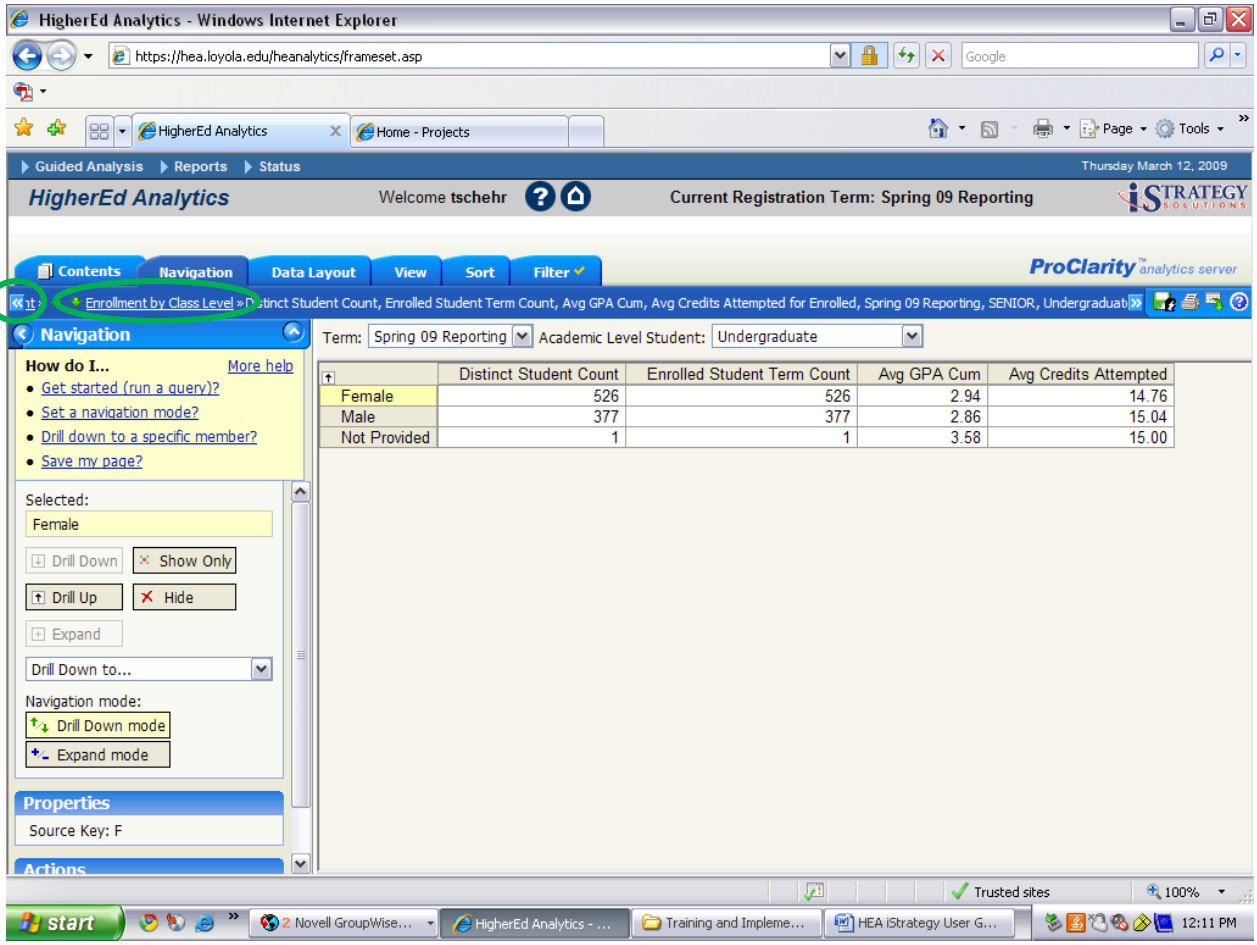


To get back to the default report, use the breadcrumbs at the top of the report to go back to the original report. You may need to click on the arrows on the left side of the breadcrumbs in order to scroll back to the original report name. Once you see the original report name, click on it and you will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



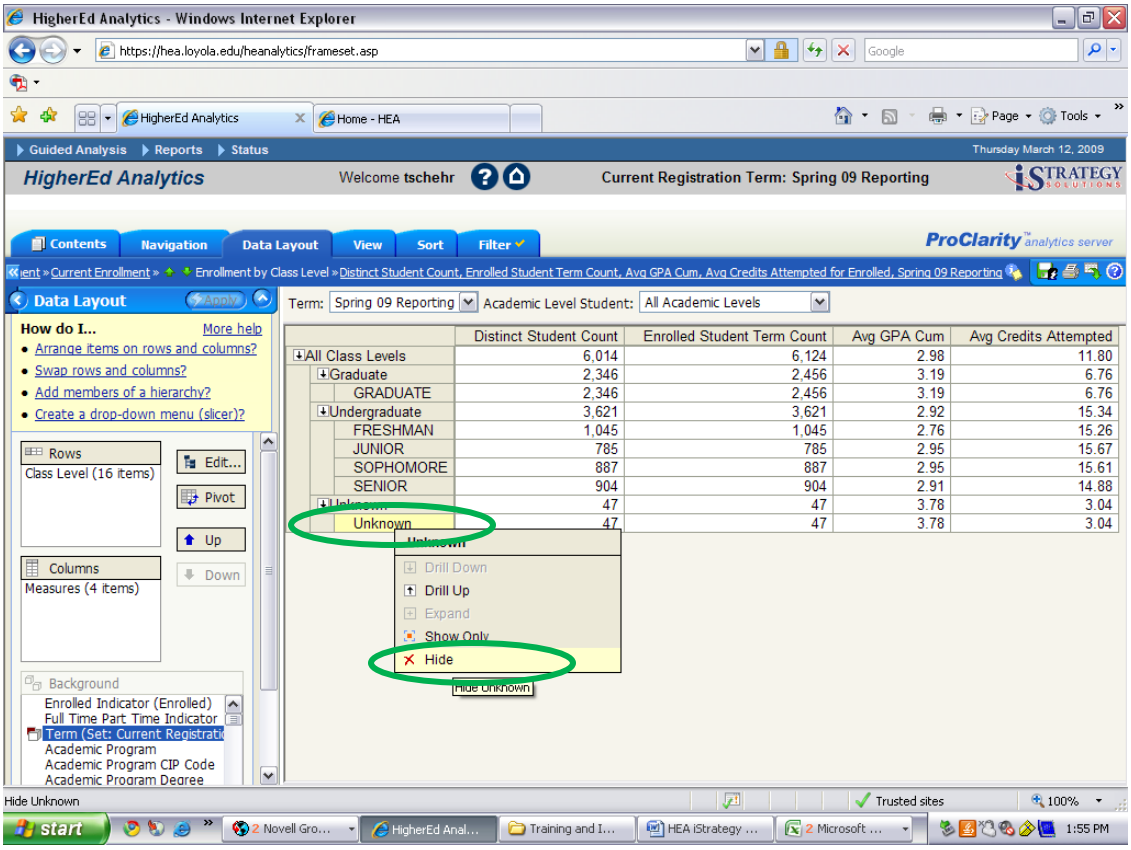
D.3 Removing a Dimension From a Report

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”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Swap rows and columns?
Add members of a hierarchy?
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Rows
Class Level (16 items)
Edit...
Pivot
Up
Down
Columns
Measures (4 items)
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Term: Spring 09 Reporting
Academic Level Student: All Academic Levels
Distinct Student Count
Enrolled Student Term Count
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Unknown 47 47 3.78 3.04
Drill Down
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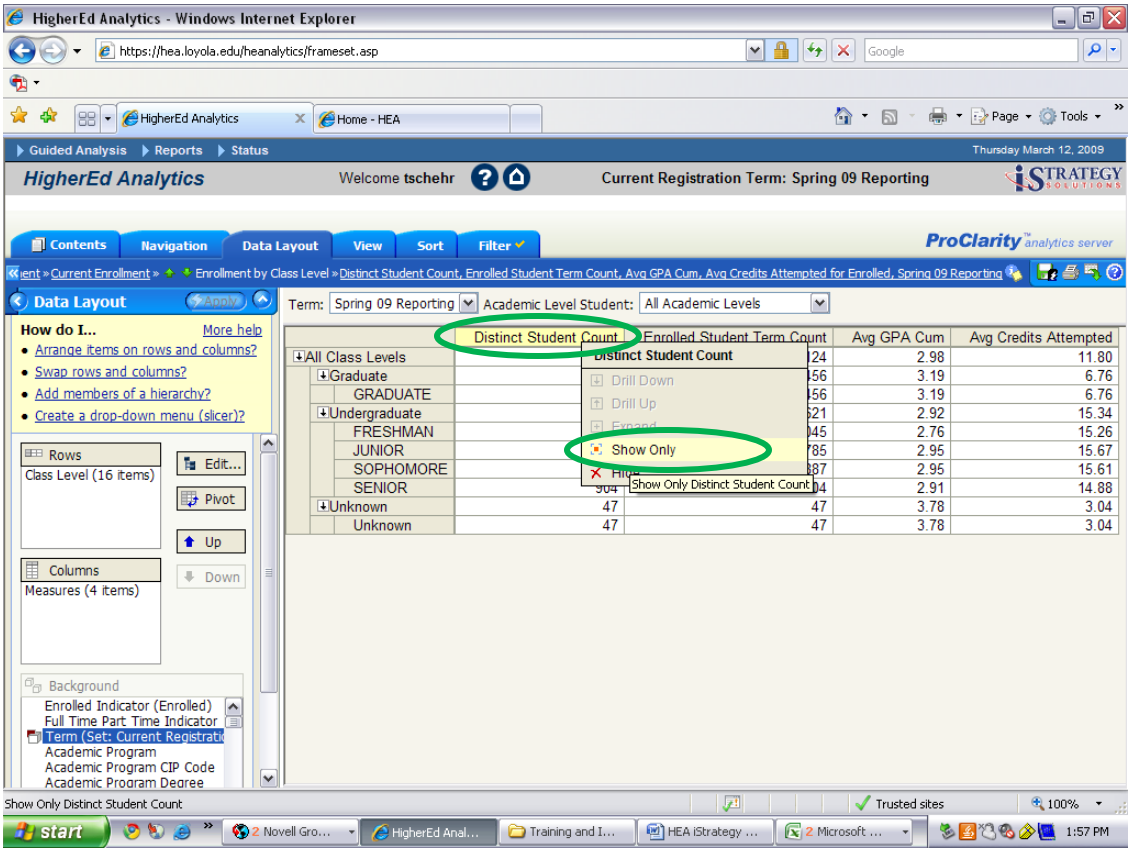
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Class Level (16 items)
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Pivot
Up
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Background
Enrolled Indicator (Enrolled)
Full Time Part Time Indicator
Term (Set: Current Registrati
Academic Program
Academic Program CIP Code
Academic Program Degree
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 11.80
Graduate 6.76
GRADUATE 6.76
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SENIOR 14.88
Unknown 47 47 3.78 3.04
Unknown 47 47 3.78 3.04
Distinct Student Count
Drill Down
Drill Up
Show Only
Show Only Distinct Student Count
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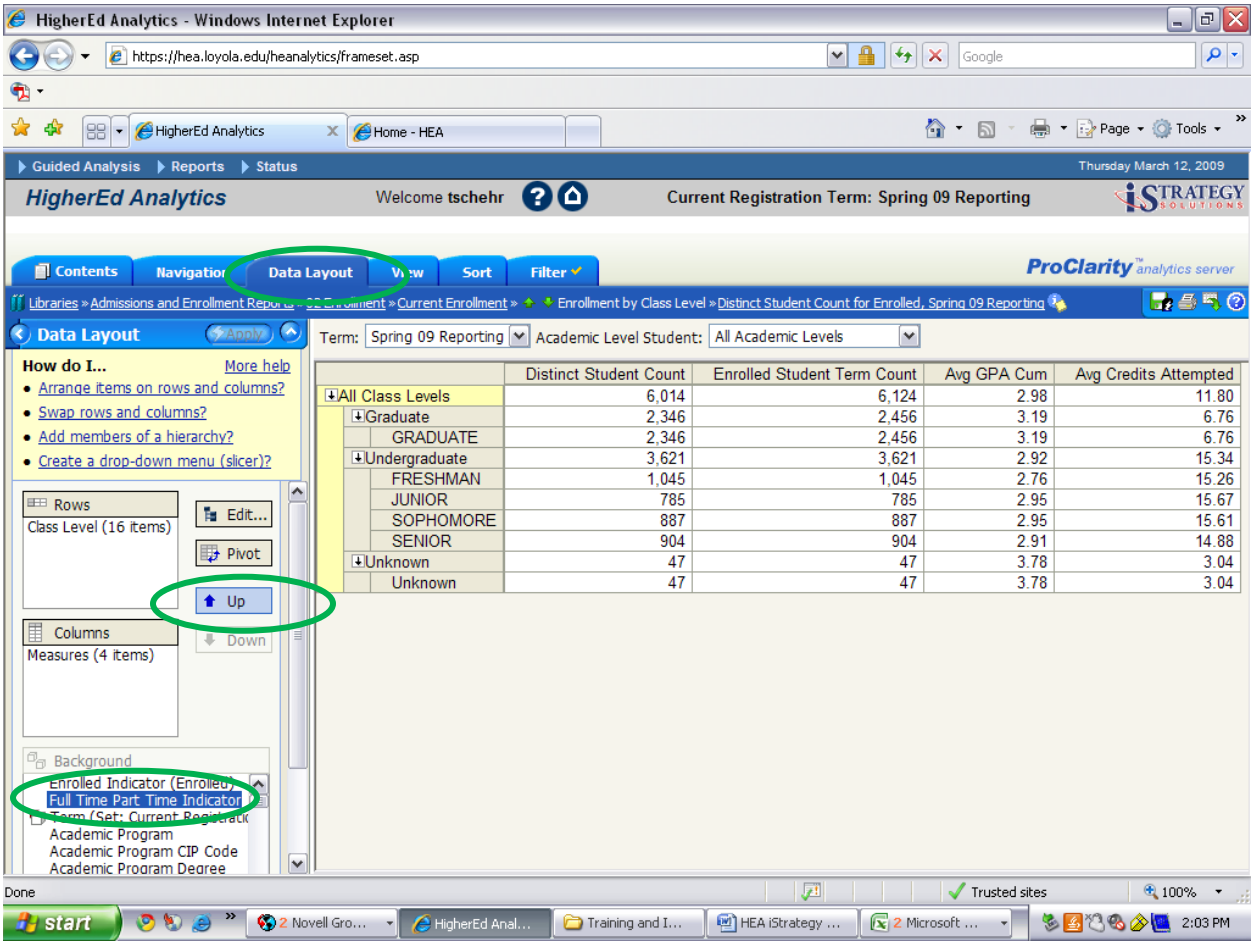
Trusted sites
100%
start
1:57 PM

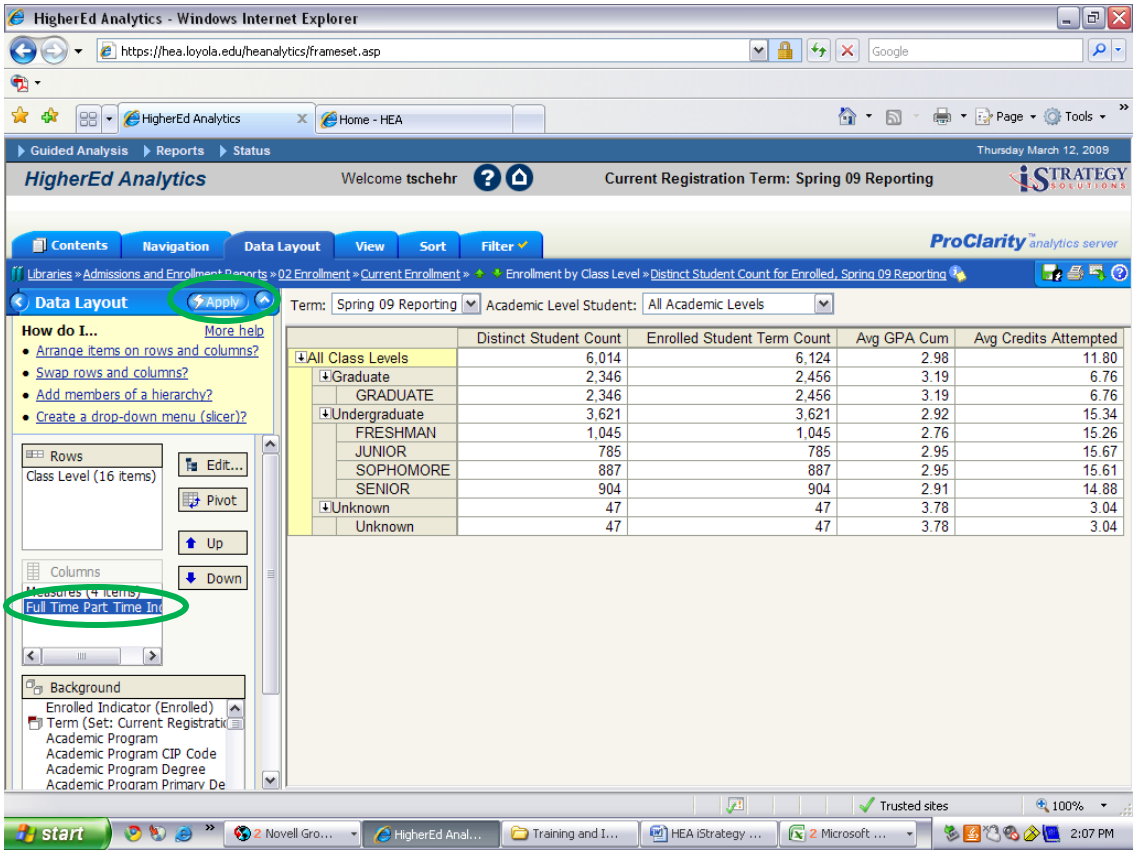
D.4 Adding a Dimension to a Report

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"




HigherEd Analytics - Windows Internet Explorer
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Swap rows and columns?
Add members of a hierarchy?
Create a drop-down menu (slicer)?
Rows
Class Level (16 items)
Edit...
Pivot
Up
Down
Columns
Full Time Part Time Ind
Background
Enrolled Indicator (Enrolled)
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Academic Program
Academic Program CIP Code
Academic Program Degree
Academic Program Primary De
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
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Training and I...
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2 Microsoft ...
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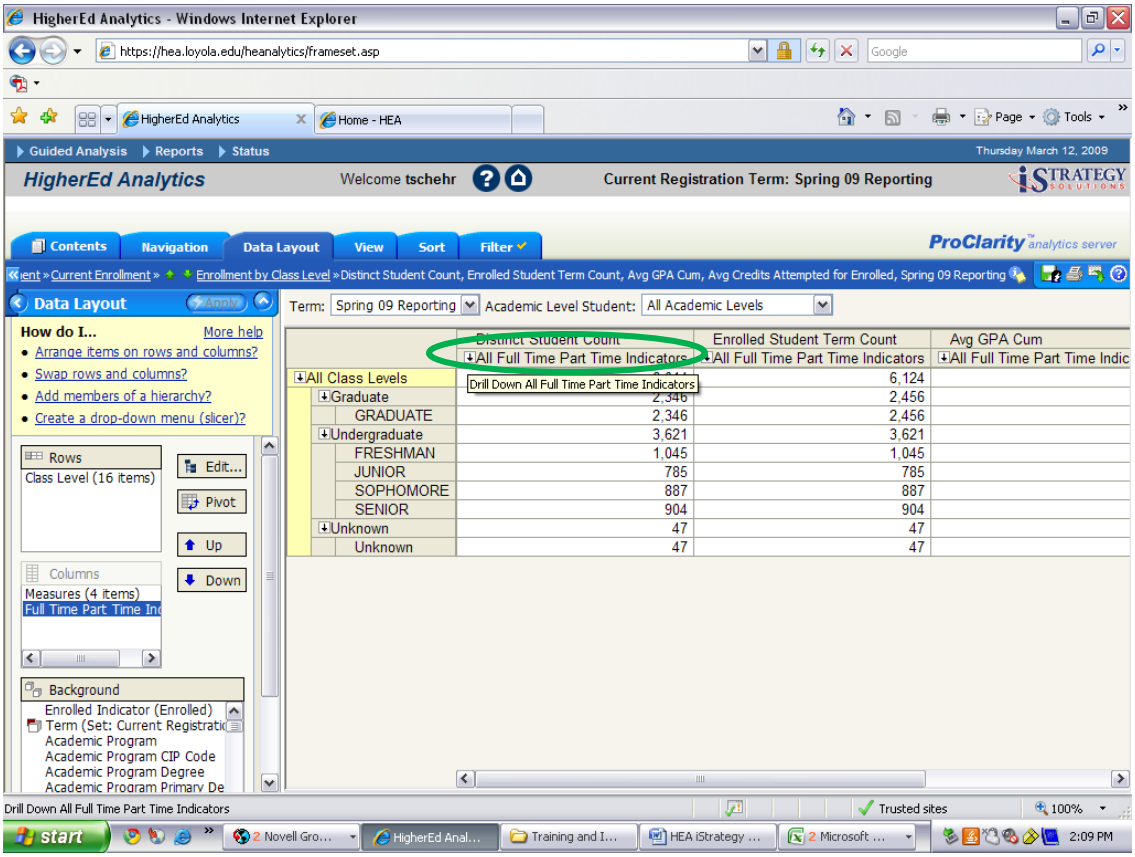
HigherEd Analytics - Windows Internet Explorer
https://hea.loyola.edu/heanalytics/frameset.asp
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How do I...
More help
Arrange items on rows and columns?
Swap rows and columns?
Add members of a hierarchy?
Create a drop-down menu (slicer)?
Rows
Class Level (16 items)
Edit...
Pivot
Up
Down
Columns
Measures (4 items)
Full Time Part Time Ind
Background
Enrolled Indicator (Enrolled)
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Academic Program
Academic Program CIP Code
Academic Program Degree
Academic Program Primary De
Term: Spring 09 Reporting
Academic Level Student: All Academic Levels
Distinct Student Count
All Full Time Part Time Indicators
Enrolled Student Term Count
All Full Time Part Time Indicators
Avg GPA Cum
All Full Time Part Time Indic
Drill Down All Full Time Part Time Indicators
All Class Levels 6,124
Graduate 2,346 2,456
GRADUATE 2,346 2,456
Undergraduate 3,621 3,621
FRESHMAN 1,045 1,045
JUNIOR 785 785
SOPHOMORE 887 887
SENIOR 904 904
Unknown 47 47
Unknown 47 47
Drill Down All Full Time Part Time Indicators
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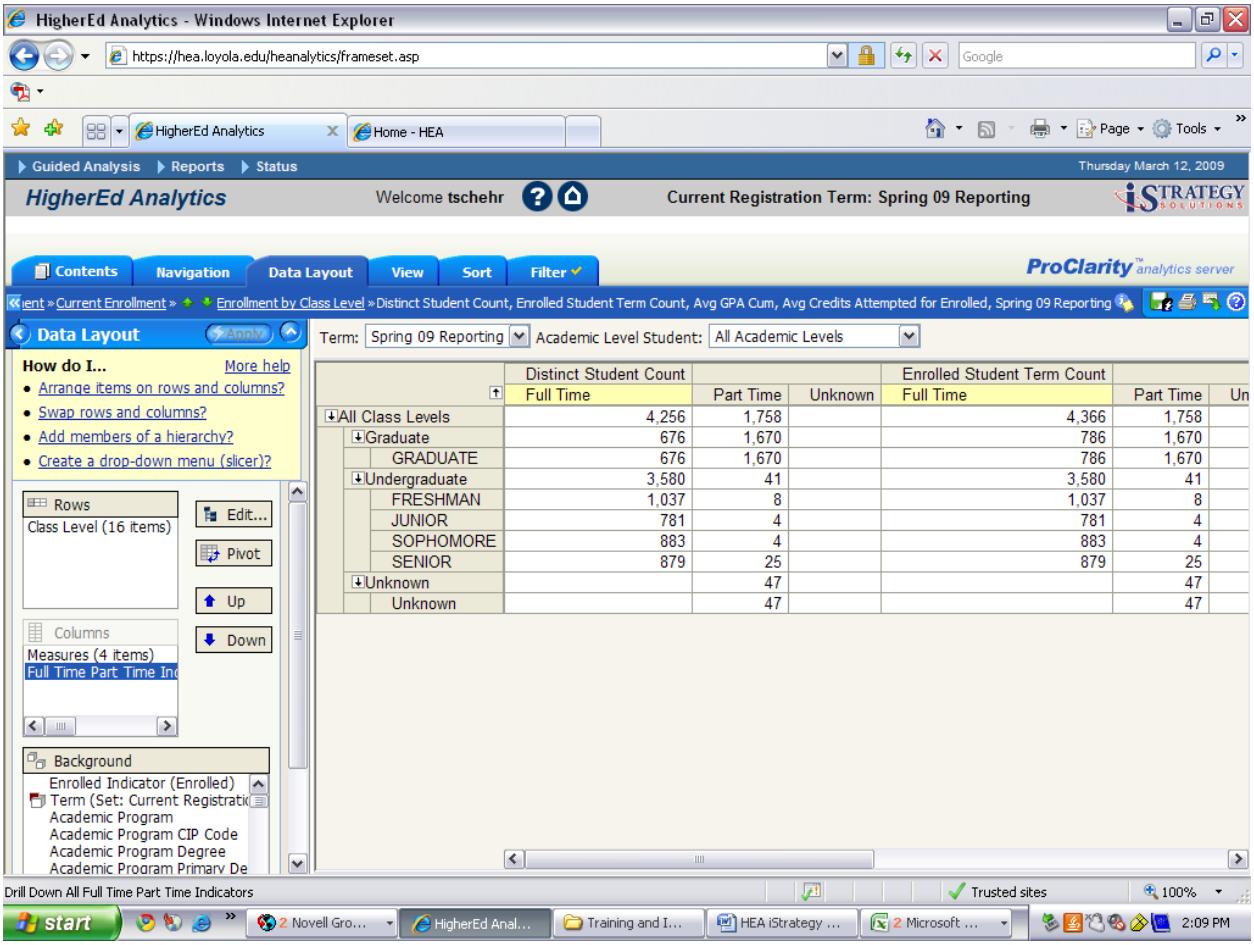
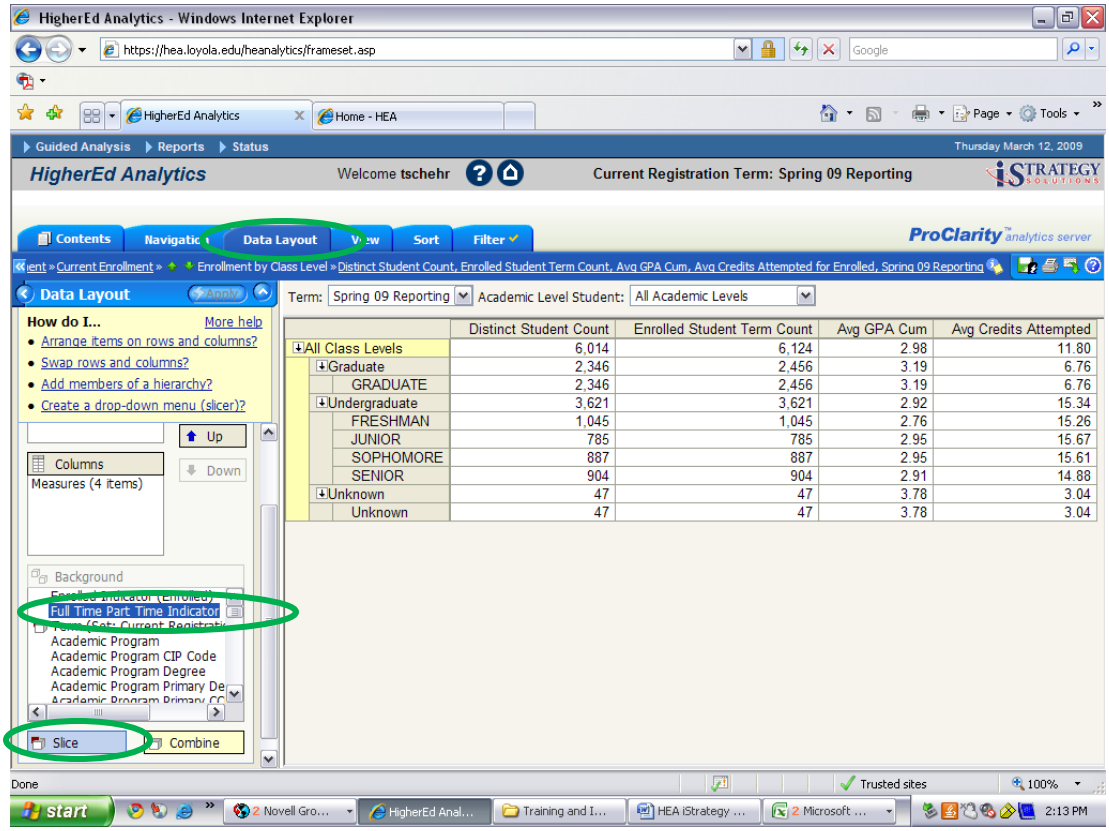


Adding a page filter drop-down menu

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
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More help
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Swap rows and columns?
Add members of a hierarchy?
Create a drop-down menu (slicer)?
Up
Down
Columns
Measures (4 items)
Background
Full Time Part Time Indicator
Academic Program
Academic Program CIP Code
Academic Program Degree
Academic Program Primary De
Slice
Combine
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
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Trusted sites
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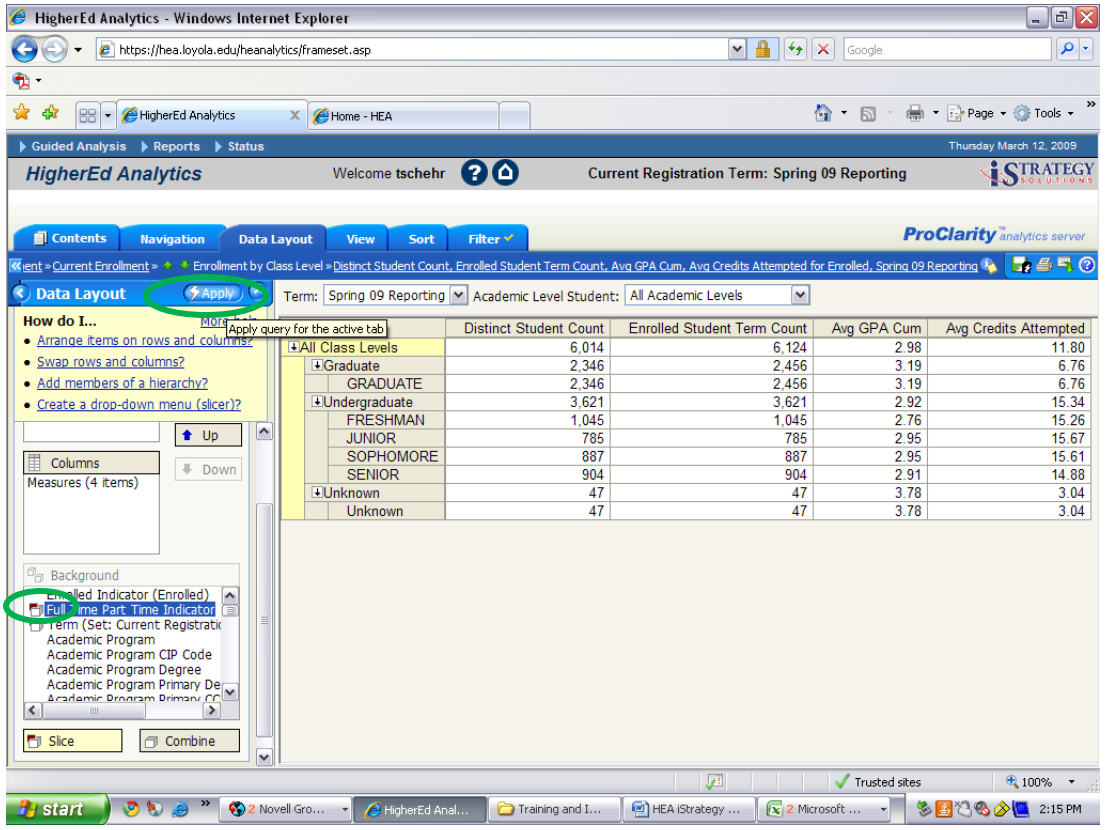
HigherEd Analytics - Windows Internet Explorer
https://hea.loyola.edu/heanalytics/frameset.asp
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Data Layout
Apply
Apply query for the active tab
How do I...
Arrange items on rows and columns?
Swap rows and columns?
Add members of a hierarchy?
Create a drop-down menu (slicer)?
Up
Down
Columns
Measures (4 items)
Background
Full Time Part Time Indicator
Academic Program
Academic Program CIP Code
Academic Program Degree
Academic Program Primary De
Slice
Combine
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
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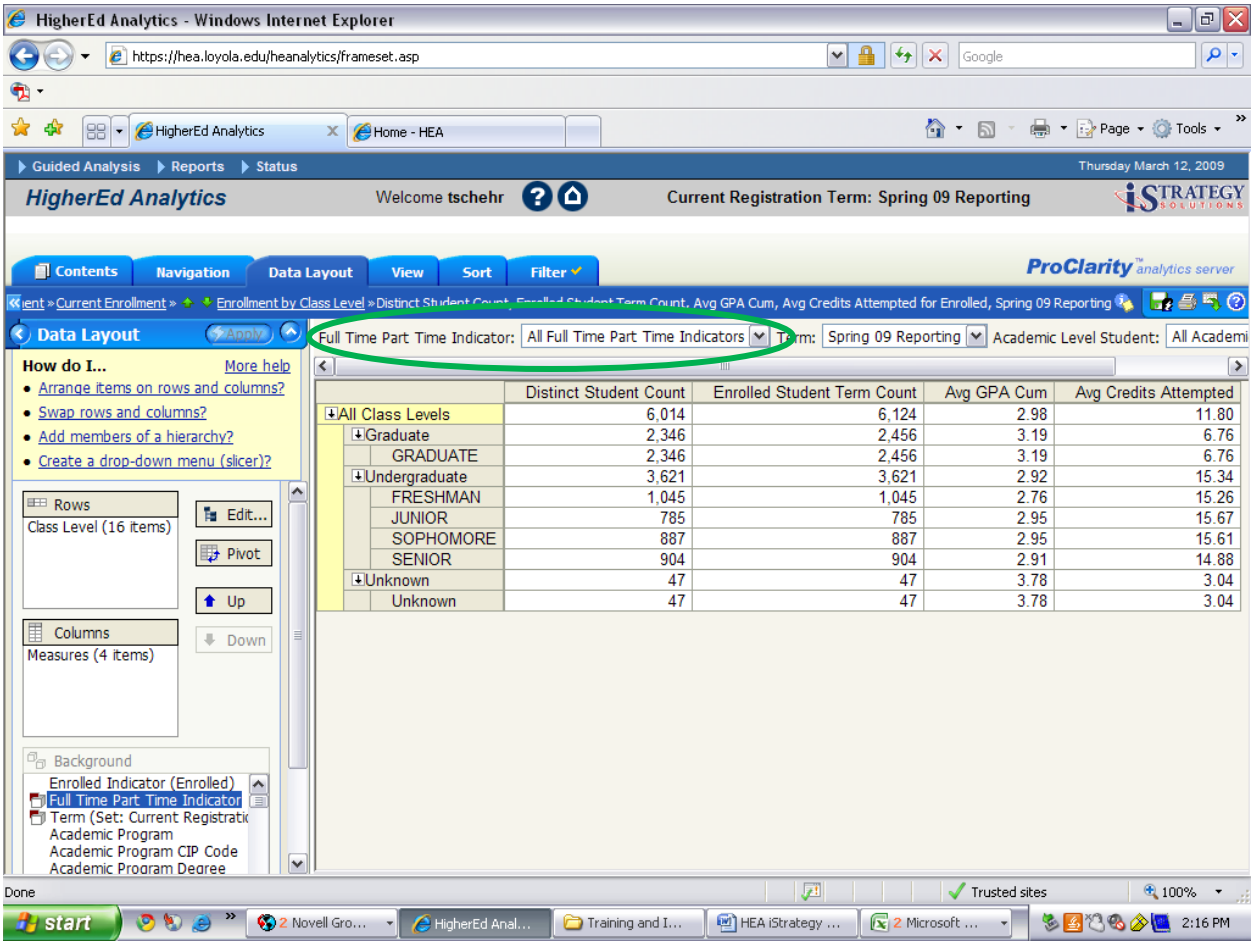
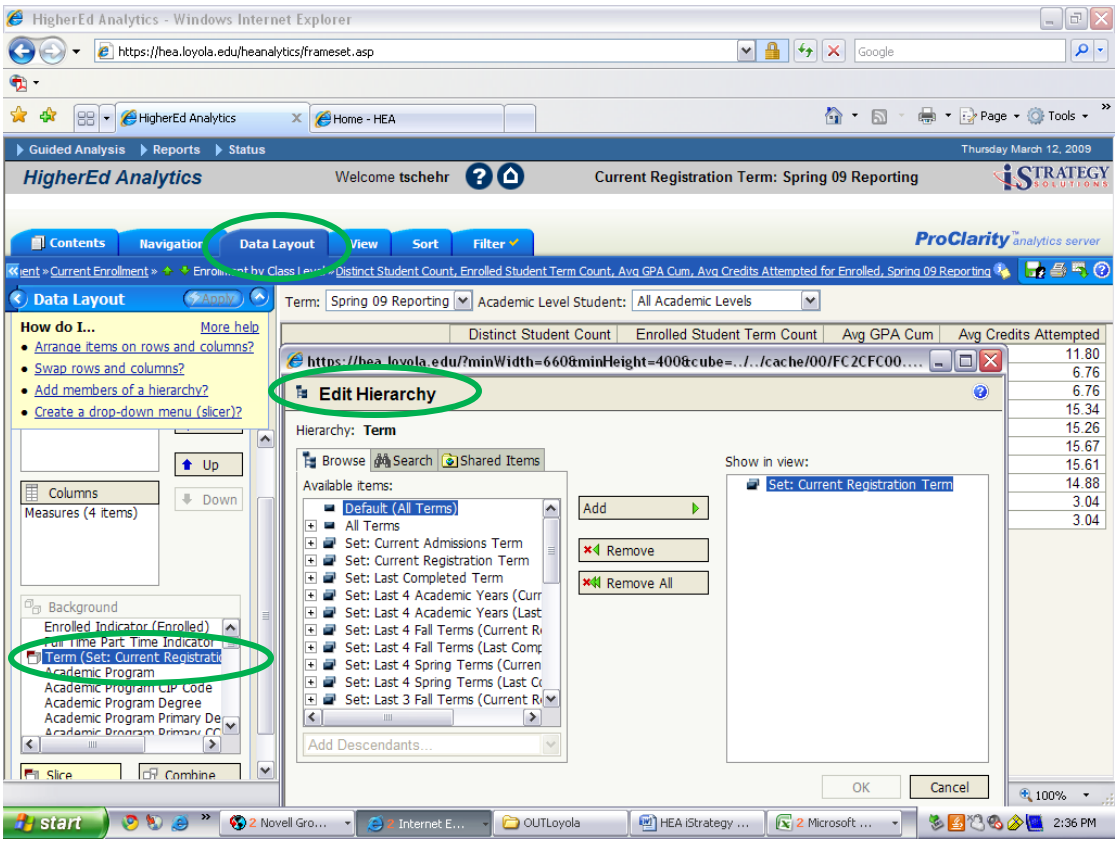


D.5 Adjusting the Values in a Page Filter

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
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Add members of a hierarchy?
Create a drop-down menu (slicer)?
Term: Spring 09 Reporting
Academic Level Student: All Academic Levels
Distinct Student Count
Enrolled Student Term Count
Avg GPA Cum
Avg Credits Attempted
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
Add
Remove
Remove All
Show in view:
Set: Current Registration Term
Add Descendants...
OK
Cancel
Columns
Measures (4 items)
Up
Down
Background
Enrolled Indicator (Enrolled)
Full Time Part Time Indicator
Term (Set: Current Registrati
Academic Program
Academic Program CIP Code
Academic Program Degree
Academic Program Primary De
Slice
Combine
start
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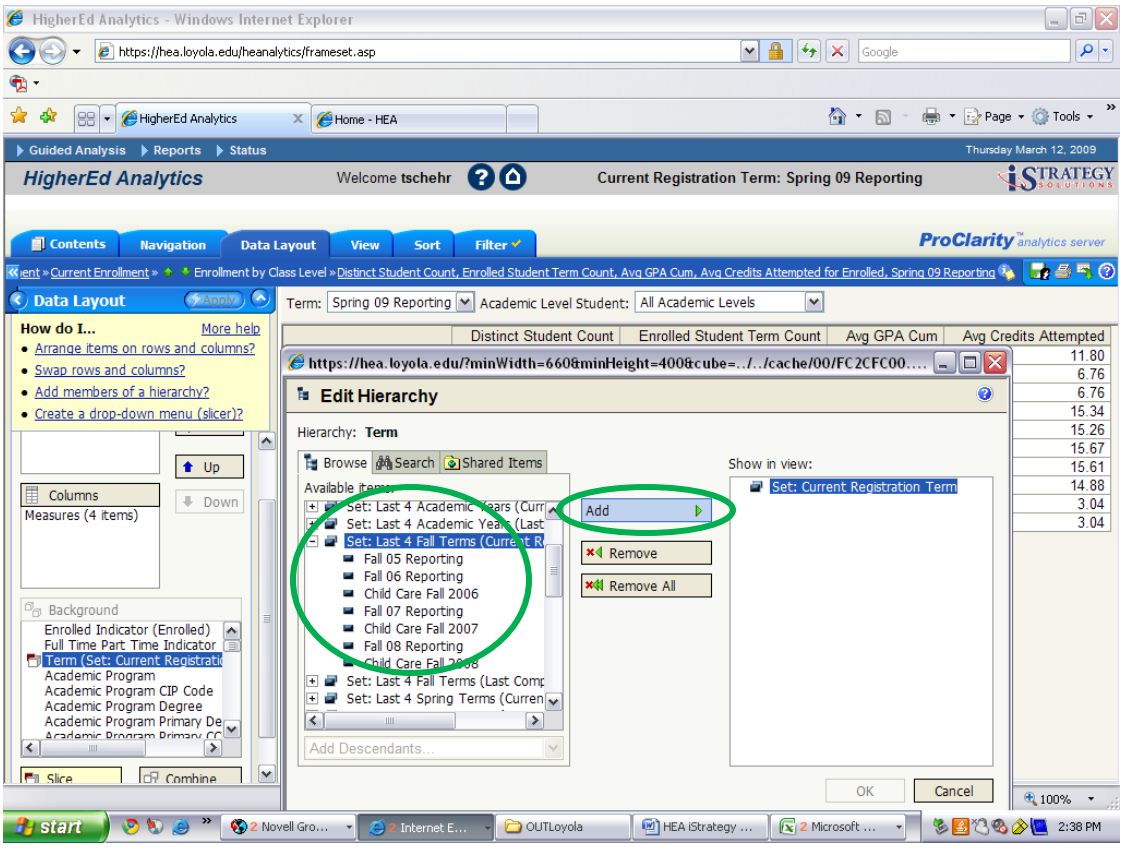
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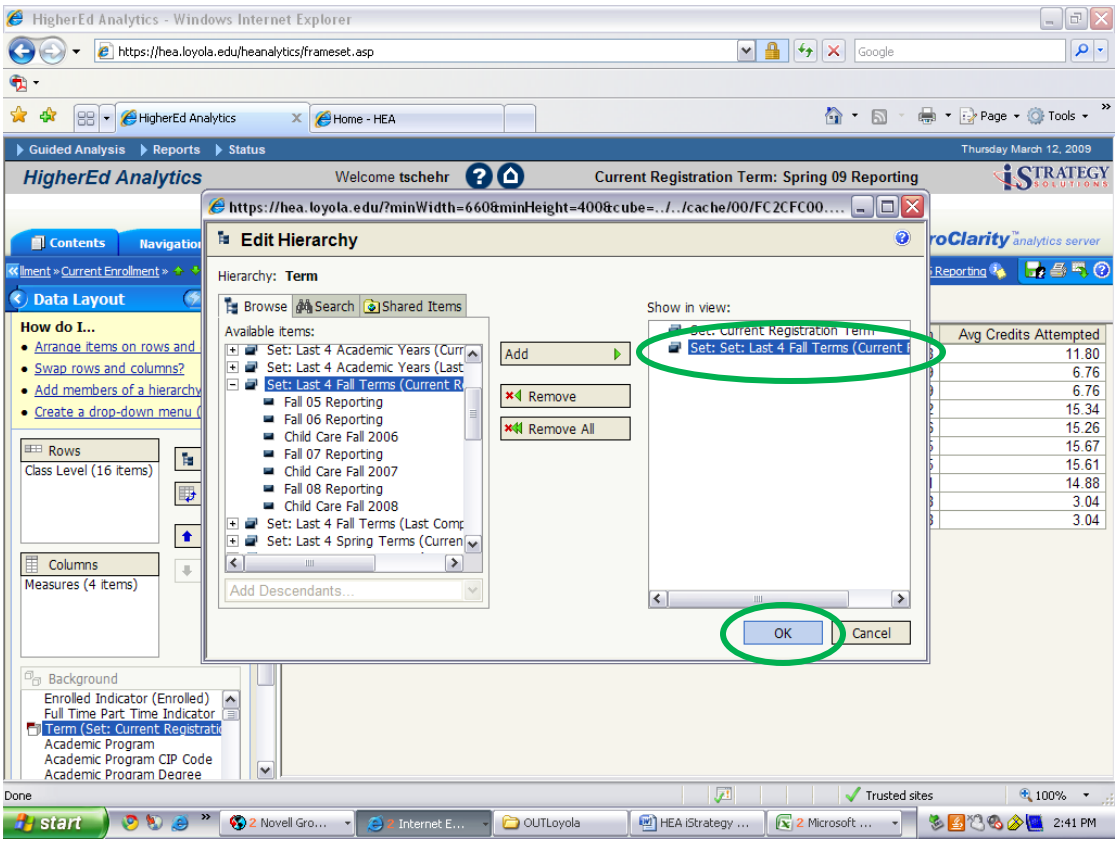
Create a drop-down menu (slicer)?
Term: Spring 09 Reporting
Academic Level Student: All Academic Levels
Distinct Student Count
Enrolled Student Term Count
Avg GPA Cum
Avg Credits Attempted
Edit Hierarchy
Hierarchy: Term
Browse
Search
Shared Items
Available items:
Set: Last 4 Fall Terms (Current R
Fall 05 Reporting
Fall 06 Reporting
Child Care Fall 2006
Fall 07 Reporting
Child Care Fall 2007
Fall 08 Reporting
Add
Remove
Remove All
Show in view:
Set: Current Registration Term
Add Descendants...
OK
Cancel
Columns
Measures (4 items)
Up
Down
Background
Enrolled Indicator (Enrolled)
Full Time Part Time Indicator
Term (Set: Current Registrati
Academic Program
Academic Program CIP Code
Academic Program Degree
Academic Program Primary De
Slice
Combine
start
2:38 PM


HigherEd Analytics - Windows Internet Explorer
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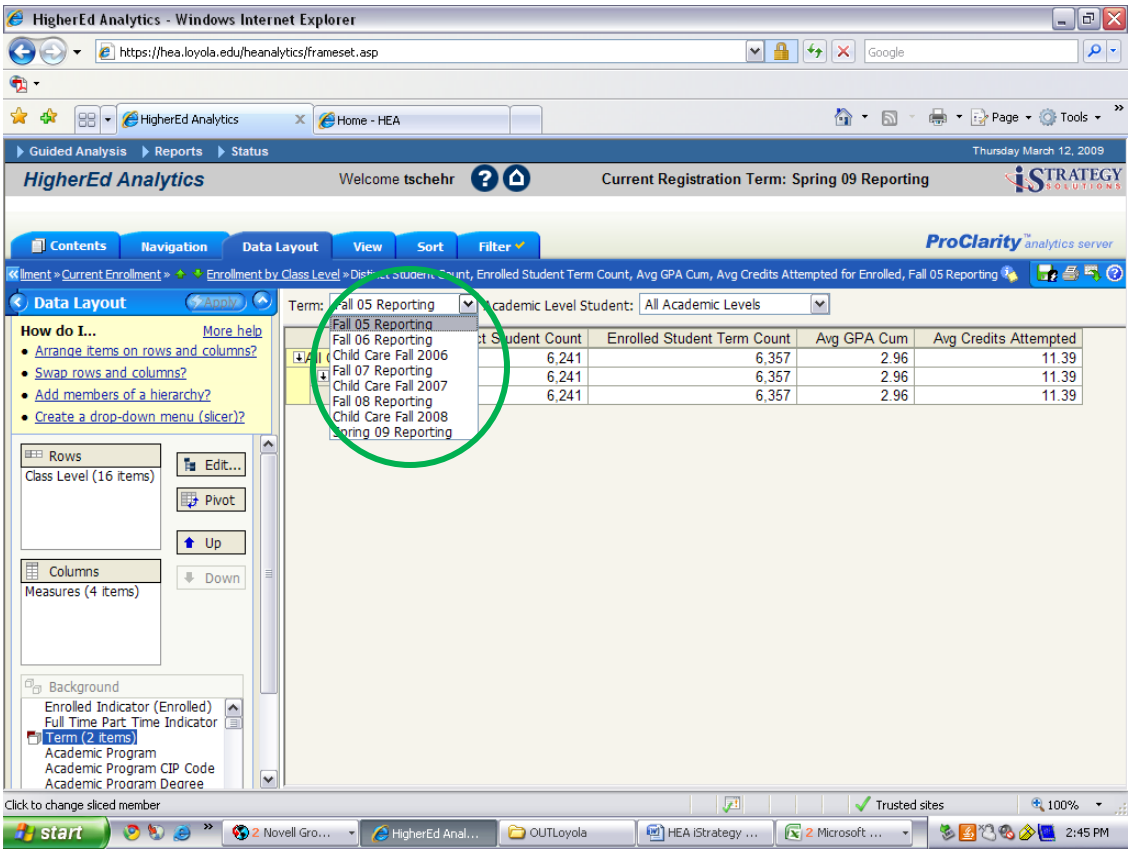
HigherEd Analytics
Welcome tschehr
Current Registration Term: Spring 09 Reporting
Edit Hierarchy
Hierarchy: Term
Browse
Search
Shared Items
Available items:
Add
Remove
Remove All
Show in view:
OK
Cancel
Avg Credits Attempted
Data Layout
Rows
Class Level (16 items)
Columns
Measures (4 items)
Background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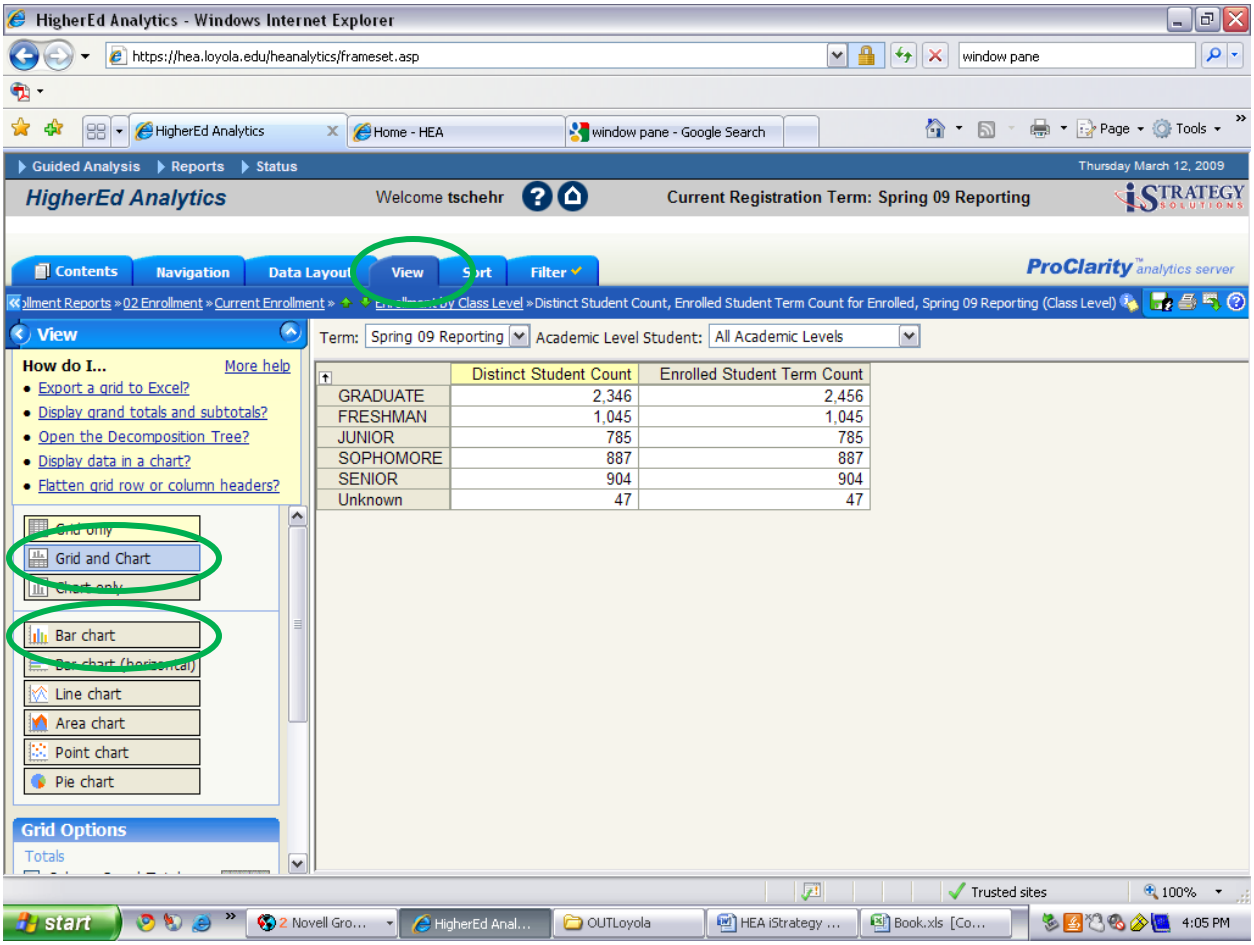
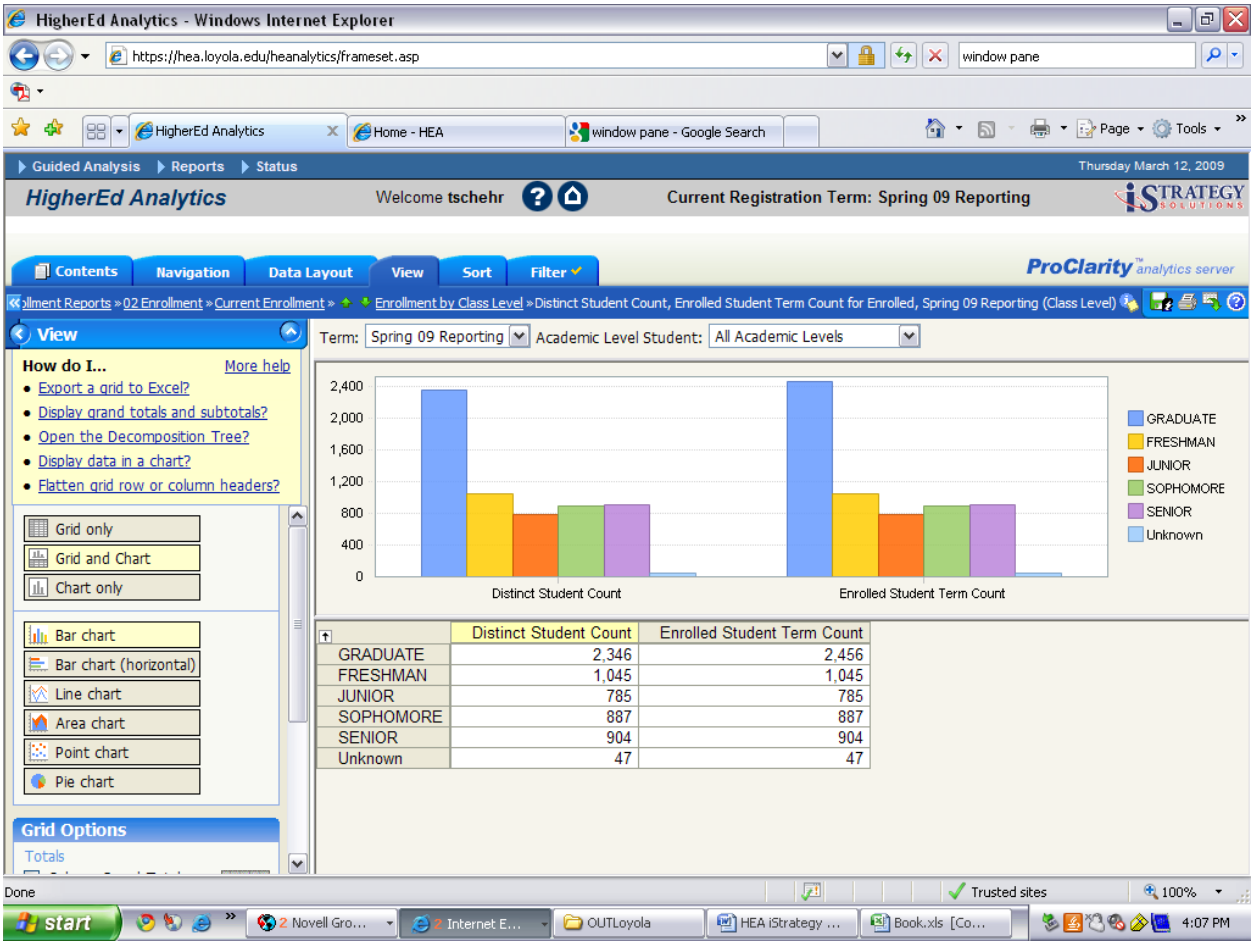
Term:
Fall 05 Reporting
Academic Level Student:
All Academic Levels
Fall 05 Reporting
Fall 06 Reporting
Child Care Fall 2006
Fall 07 Reporting
Child Care Fall 2007
Fall 08 Reporting
Child Care Fall 2008
Spring 09 Reporting
Enrolled Student Term Count
Avg GPA Cum
Avg Credits Attempted
6,241
6,357
2.96
11.39
Data Layout
How do I...
Rows
Class Level (16 items)
Edit...
Pivot
Up
Down
Columns
Measures (4 items)
Background

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





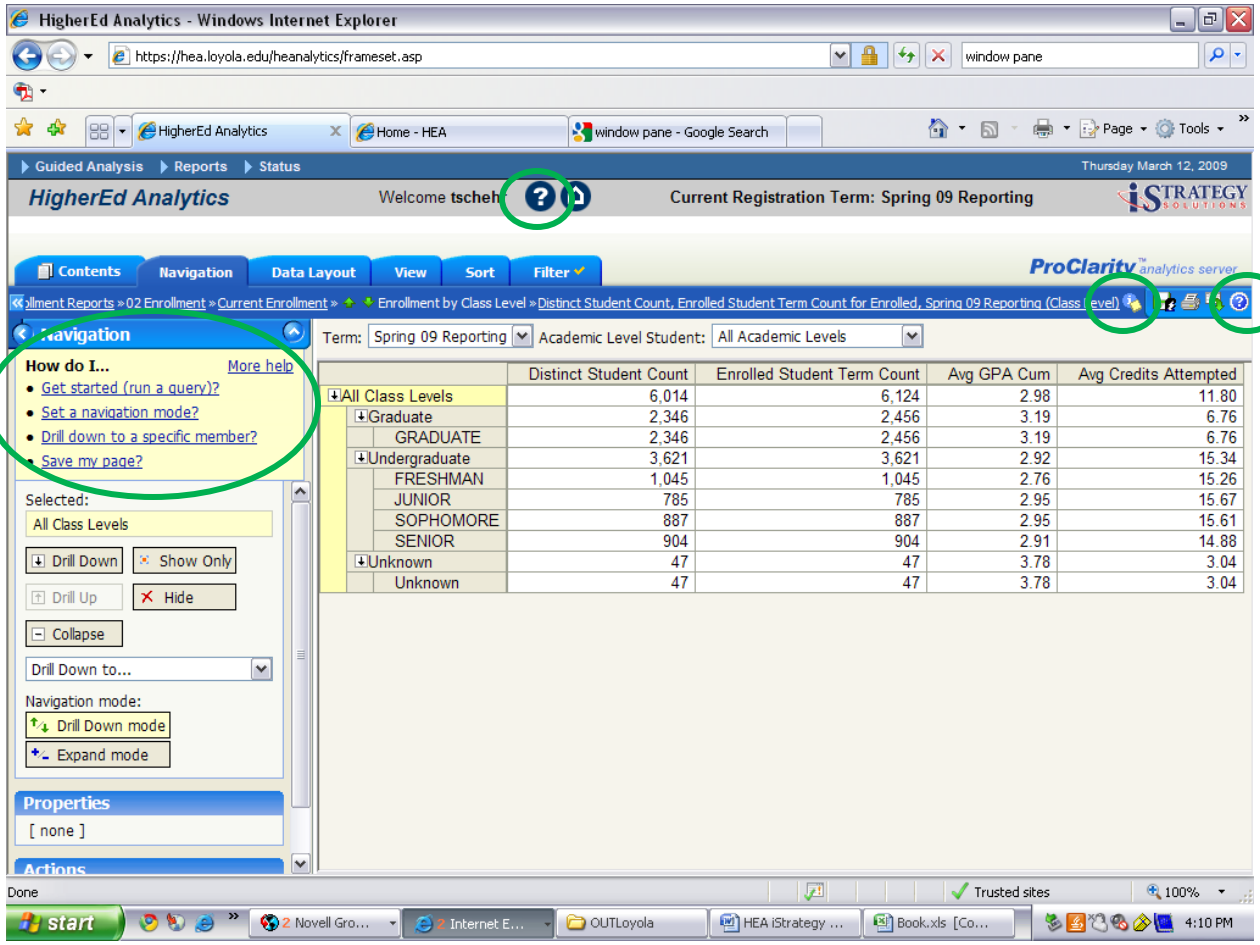
F. Help and Information

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 butto.

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
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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
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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
Trusted sites
100%
start
Novell Gro...
Internet E...
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HEA iStrategy ...
Book.xls [Co...
4:10 PM