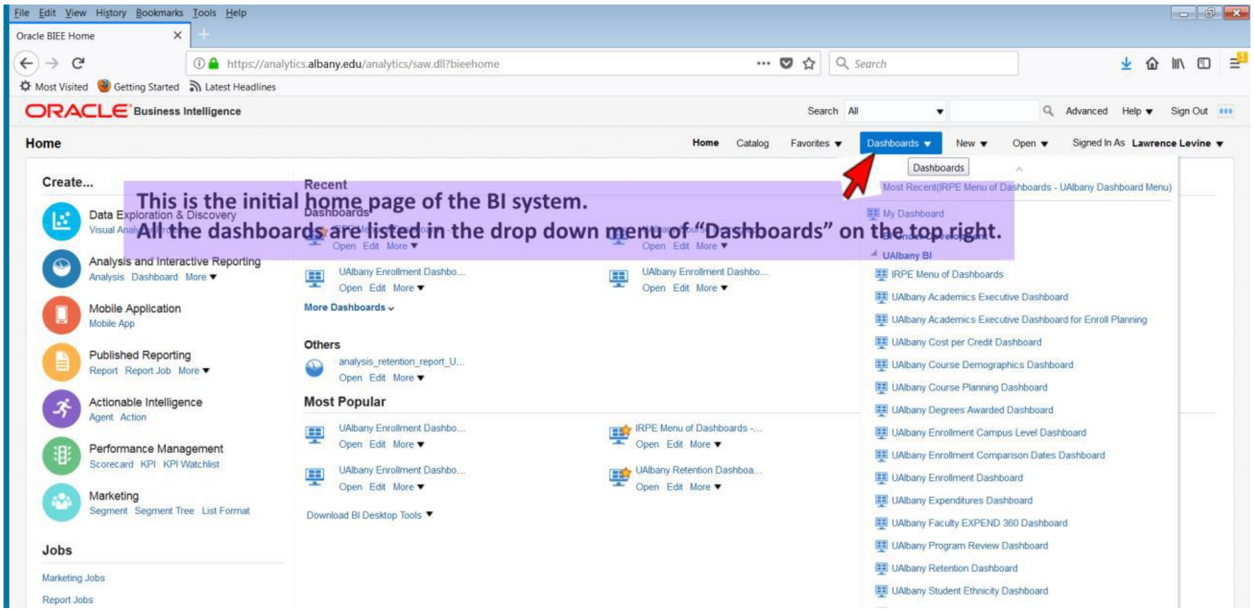
# The UAlbany Business Intelligence (BI) system

The UAlbany Business Intelligence (BI) tool integrates massive amounts of University wide data. Information content and formats are highly customizable. Below please find a brief orientation to the BI custom reports on schools, departments, programs, students, faculty, and staff.

## Getting into the UAlbany BI system

Log in URL is [https://analytics.albany.edu](https://analytics.albany.edu) using your NetID and password.




Above is the initial home page of the BI system. All the dashboards are listed in the drop down menu of “Dashboards” on the top right. These dashboards contain sets of other dashboards on a data theme, for example “Enrollment Dashboards.” The menu called “IRPE Menu of Dashboards” contains a list of some of the popular dashboards, but the drop down menu contains the entire list.

Testing for access:

One way to tell if you have access yet is after you login at https://analytics.albany.edu , go to the top center in the horizontal bar of tabs where it says: Home, Catalog, Favorites, Dashboards,

-- Click the dropdown arrow for “Dashboards”

-- If you have access, you will see “UAlbany BI” listed, and then clicking on that will show a dozen or more dashboards listed under it, all starting with “UAlbany ...”

-- Note, if accessing from home then you may need Global Protect VPN from ITS:

[https://wiki.albany.edu/pages/releaseview.action?pageId=77139467](https://wiki.albany.edu/pages/releaseview.action?pageId=77139467)

***Please note*** – The UAlbany BI System is available seven days a week from 8 AM to 11:30 PM. Exceptions for scheduled weekend maintenance outages. Any unscheduled outage or update causes an automatic notification to the BI Team members. System access questions may be directed to the ITS Service Desk online or call 442-3700.

## Tips and pointers to use with the dashboards:

-- To add fields to an analysis **right-click on variable names in the header** to INCLUDE data elements/fields not shown by default. You will then be prompted with a list of available variables that can be clicked on to bring into the analysis.

-- To remove a field from an analysis right-click on that variable name in the header row you want to EXCLUDE from the table or graph. They will appear to go away after clicking EXCLUDE. You can bring them back using INCLUDE.

> -- Do NOT click "HIDE," or they will be eliminated for good in the current session, but you can log out and back in to see them again if need be.

-- You can right-click on variable names in the header row and then click on Show Total or different types of aggregations (e.g., before or after the variable breaks).

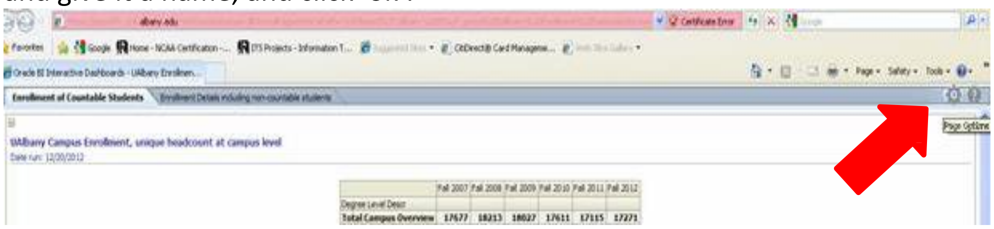
> -- You can add or remove totals as you wish.

-- Column location (L-R) affects sorting. Columns to the left are dominant in sorting (over columns to the right). This is different than you may be used to in Excel (where there is no dominant column). You can move columns in the tables by holding a click of your mouse just above the field name, and dragging it left or right. To sort a column in ascending or descending order, click your mouse on the column title where a triangle appears in response to the mouse-over (in the header row).

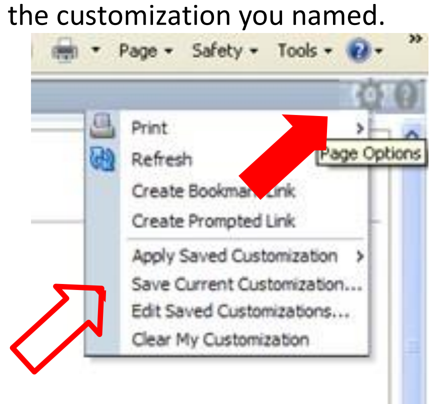
-- There are at least 3 ways to export data, all using the "Export" link at the bottom of a displayed analysis. Click the Export link then choose any of the following:

> -- "PDF" to download what is similar to a saved image of your analysis results.
>
> -- Excel to download an Excel representation of the your analysis results. While having Excel functionality, there will be formatting included as Excel attempts to retain the look of your analysis. The Excel download will reach row count limits rather quickly (depending upon how many fields). Note this limit is a result of the transformation to Excel process, and not by Excel itself.
>
> -- Data: CSV Format to download a data file of all available fields of your analysis (whether those fields are currently displayed or not). This file is a comma separated text file that can be used by many computer applications, and can be opened up by Excel. Note that leading zeroes (such as for emplids and zip codes) are in the CSV, but if you open into Excel they may be dropped if Excel displays them as numbers. Changing the file extension to TXT can for Excel to import using a wizard where you control the formatting. Either way of opening the CSV file is ok, but just be aware that Excel likes by default to read numeric text as numbers (converting them in the process) unless you tell it to do otherwise. The CSV download allows many more rows than can otherwise be done with an Excel download (typically 100,000 is the limit with CSV). CSV download is the fastest and has the largest allowed limit on data, but does not retain any formatting.

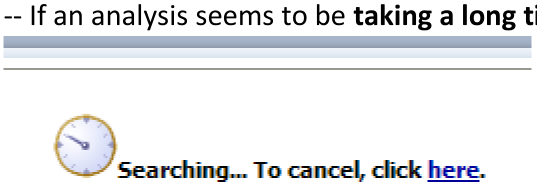
-- You can SAVE your customization of an analysis view by going to the Save Customization from the "Page Options" dropdown box which is in the upper right hand corner of the screen (See the gear icon). Once you open the "Page Options" drop down box, click on "Save Current Customization" and give it a name, and click 'ok'.



-- To load a named customization go to Page Options icon in the upper right side of the screen and click "Apply Saved Customization," and choose the customization you named.




-- If an analysis seems to be **taking a long time** to open (a minute or more), click Cancel.




-- Then use the prompts at left to **restrict the initial data grab** to specific departments or types of data you want (e.g., Dept., type of instructor, program names, degree levels, etc.) to avoid loading the entire data set. **(CANCEL - allows the server to reply more quickly.)**

## Some selection prompts can query from your lists (i.e. Emplids from Excel).

Prompts with "More/Search" at the bottom let you type or paste a list of values such as Emplids. Those dashboards with drop-down values accommodate search and manual selection.
1.) Select the search at the bottom of a drop-down.
2.) Select the pencil edit icon at the far right of the Search screen.
3.) An Edit screen appears— that accepts a list (i.e. Emplids from Excel).
4.) Paste or type a list and click OK.
5.) See the list and click OK again.
6.) See a couple values and click Apply.
The result is a table with cases of only the listed values you provided. Note that leading zeroes need to be included for an emplid.

## Security access for new users of the BI system:

We have pre-loaded security access for department chairs and program directors, dean's senior staff, and assistants to chairs. If we missed somebody who has a business need to use the BI system, their supervisor can request access for them by submitting an ITS Help Request at www.albany.edu/its/help.
After the supervisor puts in their own information, select "Business Intelligence" from the 'This request concerns' dropdown list. In the "Description" field, enter the Name and NetID of the person that needs the BI access. Please mention the area of BI that you need access to (such as All Funds, or Enrollment).

## Security/Privacy Concerns

Everyone who accesses the BI system must read and sign the Employee Access and Compliance Agreement that has been signed and forwarded to Human Resources for IAS (PeopleSoft) access. If they have not already done so then they should go to the Access and Compliance Agreement and follow the instructions there. The agreement stipulates that
"Because of the possible sanctions the University could suffer resulting from the loss or exposure of regulated information, and the increasing threats targeting that information, it is vitally important that University employees accept the role of informed guardians of campus business records.
By signing the attached Employee Access and Compliance Agreement, you agree to comply with the applicable laws and University policies and procedures governing the handling and use of those records. Your efforts in protecting information vital to the campus's mission of teaching, learning, and research are greatly appreciated."
**In summary, all data in the Business Analytics system are restricted to official business use and legitimate educational interest essential to carrying out your job responsibilities.**

## What data are in UAlbany BI system?

Student enrollments by department and program, enrollments in classes and the course planning data that were previously on the IRPE wiki are now in the BI system. Average class sizes (controlling for cross-listed and shared-resource sections), and enrollments at various levels of aggregation and by who teaches the classes (e.g., by tenured/tenure-track or PT faculty status), student credit hours, seats, and FTEs, also by various levels of aggregation are in the BI system. Costs of academic program data are also in the BI, along with expenditures by department or program by purpose/function. The “UAlbany Expenditures Dashboard” include only expenditures (organized by the semester to which they were related) and is different from the “All Funds” dashboards. Data on research applications and awards are in the BI as are degrees awarded, grade distributions, and All Funds. All analyses and data tables presented in the dashboards can be modified interactively with regard to data organization and which data elements are included or excluded.

## What’s not in the BI?

Data on research expenditures, as well data on faculty scholarship and creative works are not in the BI system. Also not included are space utilization data. Data relating to student activities/life is not in the BI. Course evaluation results are not in the BI, nor is Human Resources or position control data.

## Your feedback and Questions?

Please send any feedback or questions to Jeff Gerken at jgerken@albany.edu. Questions about Courses, Sections, Instructors, and Course Enrollments can also be directly addressed to Laura Benson Marotta at lbensonmarotta@albany.edu.