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 [http://analytics.albany.edu](http://analytics.albany.edu) using your UAlbany NetID and password.

Please note – The UAlbany BI System is available seven days a week from 6:00 AM to 12:00 midnight except for scheduled weekend maintenance outages. Any unscheduled outage or update causes an automatic notification of the BI Team members. System access questions may be directed to the [ITS Service Desk online](http://analytics.albany.edu) or call 442-3700.

Your feedback: Does the BI meet your operational and planning needs?
Please send any feedback on what you like, do not like, or really would prefer, to Jack Mahoney at jmahoney@albany.edu. For questions about Student Enrollment and Student FTE please contact Jeff Gerken at jgerken@albany.edu. For questions about Courses, Sections, Instructors, and Course Enrollments please contact Laura Benson Marotta at lbensonmarotta@albany.edu.

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. **Note:** The menu called “IRPE Menu of Dashboards” contains a list of nine of the most popular dashboards. These dashboards contain sets of other dashboards on a data theme, for example “Enrollment Dashboards.”
Tips and pointers to use with the dashboards:

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

- 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 go away after clicking EXCLUDE. You can bring them back later 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) affect sorting. You can move columns in the tables by holding a left click of your mouse just above the field name, and dragging it left or the right.

- To sort a column in ascending or descending order, left click your mouse on the column title where a triangle appears in response to the mouse over (in the header row).

- You can **SAVE** your customized view for later use after you make changes to a dashboard or chart, including changes to the prompt values, -
  - You then won’t have to go through all these steps the next time.
    - 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’.
- You can set this named customization as the default, to later add your desired prompt parameters each time you come back to this dashboard (See “Save Current Customization”).

- To load a named customization that was not set as default, first return to the Page Options icon in the upper right side of the screen and click “Apply Saved Customization,” and choose the customization you named.

Some selection prompts can query 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 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.
Expenditures Data note:
The “Expenditures Dashboard” is different from the “All Funds” dashboards. These are “expenditures” only, and organized by the semester to which they were related, and not by fiscal year in which the expense occurred. To reconcile funds please use the All Funds dashboards.

How to add 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.

Security/Privacy Concerns
Everyone who accesses the BI system must read and sign the Employee Access and Compliance Agreement if they have not already done so for IAS (PeopleSoft) access (http://www.albany.edu/its/images/EACA_10_06_2010.pdf). This signed statement must be forwarded to Human Resources to be recorded in IAS. This 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. 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 yet in the BI, nor is human resources or position control data.

What is coming next?
We are now at work to bring in the remaining data elements related to instruction (e.g., grades by instructor, advisors, student milestones, student groups, etc.) so that departmental staff can use the BI platform rather than the numerous UADW queries they must now rely upon. Undergraduate and graduate admissions data are now in progress, and will be followed by financial aid. Another possible priority is integrating research expenditures into the BI.

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