

**CASE Insights<sup>SM</sup>**

data | standards | research



# **CASE Insights<sup>SM</sup> Data Portal Quick Start Guide**

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## Accessing the CASE Insights Data Portal

Go to: <https://amatlasdata.case.org>

Contact the CASE Insights team at [dataminer@case.org](mailto:dataminer@case.org) or 917-336-4023 to request an account.

We will email you an invitation with a link, active for two weeks, to set up an account on the CASE Insights data portal (formerly AMAtlas Data Miner) website.\*

**Forgot your data portal password?** Go to the portal [login page](#) and click the “Forgot your password” link. Enter your email address. You will be emailed a link to reset your password. The new password will be applied to your data portal account and your CASE Insights survey account if you have one.

\*The CASE Insights team is working towards implementing single sign-on for the data portal so you can log in with your CASE member credentials. To ensure that your existing data portal account syncs properly with your member, your registered email address must be the same on your CASE member account and data portal account. Email the CASE Insights team at [dataminer@case.org](mailto:dataminer@case.org) if you have questions about updating your email address.

## Data Portal Assistance & Training

For assistance or to schedule an individual or group training session, contact the CASE Insights team at [dataminer@case.org](mailto:dataminer@case.org) or 917-336-4023. Our office hours are 9:00 a.m.–5:00 p.m. Eastern time.

## Home Page

### Announcements

Announcements appear near the top of the data portal home page and include information about the release of data and publications, site updates, and other related news.

### Recommended Reports

The data portal home page features **Recommended Reports** created by the CASE Insights team including a report with core data from CASE Insights on Voluntary Support of Education (VSE) (United States) and a summary report for the global CASE Insights on Alumni Engagement.

Click the folder icon to open a recommended report. When the report is open, you can download the detail or summary (aggregated data) report as a CSV file and/or copy the report to modify the inputs (the comparison group, institutions, variables, and year in the report). See [Edit a Saved Report](#) for information about modifying a report’s inputs.

## Downloadable Reports

Since 2019, CASE member institutions that participate in the CASE Insights VSE and Alumni Engagement surveys get [summary benchmarking reports](#) as a member benefit. The reports can be downloaded under the **Downloadable Reports** section on the data portal home page. There are arrow keys to move through all the available reports for your institution. If you do not have any summary benchmarking reports, you will see an **Open Reports** section instead of Downloadable Reports.

The summary benchmarking reports from 2020 forward are in HTML format. Open the file after downloading it, and the interactive report will load in your web browser. The HTML files can be shared with colleagues. (Send the file. Do not send the browser link.)

## Quick Links

On the right side of the data portal home page is a collection of links that allow you to quickly create a new report or comparison group or go to your saved and downloadable reports.

For higher education institutions that have an IPEDS peer group, there will also be a link to build a report pre-populated with your institution and your IPEDS peer group. You simply add your desired variable(s) and year(s) and run the report.

## Sharing Reports & Comparison Groups

You can choose to share the reports and comparison groups you create with others at your institution. When you save or edit your report or comparison group, set the **Sharing** option to **Unit** to share it. The default is blank, which is not sharing. Other data portal users at your institution will be able to view and use your items. They cannot edit your originals. They must make a copy if they want to modify an item you created.

Don't see the **Unit** option in the Sharing drop-down menu? Contact us at [dataminer@case.org](mailto:dataminer@case.org). We will add the function to your account.

## Reports

### Create a New Report

- On the main menu, expand **Reports** and select **New Report**, or select **Create New Report** from the home page Quick Links.
- In the report inputs, you must specify at least one comparison group or institution, one variable, and one year for your report.

## Comparison Groups & Institutions

Comparison groups include those previously created and saved by you, those created and shared with you by others at your institution, those created by the CASE Insights team, and IPEDS peer groups for those U.S. institutions that have them.

- Browse or search for a comparison group or institution name. The search is for an exact match, so use partial terms for the most results. You can use more than one comparison group or institution and also use both groups and institutions.
- If you choose a comparison group in which your institution is not included, you must add your institution to the report inputs. Your institution is not included by default.
- Click + to the right of the name of the comparison group or institution you wish to add to the report. The item is moved to the right side of the screen, which shows your report selections. Repeat to add more comparison groups or institutions.
- Next to comparison groups that are added to the inputs you will see a box, checked by default, that asks if you want to include detail. Leave this box checked if you would like to generate a report that includes data for each institution in the group. If you uncheck this box, only aggregated data for the group will be returned.

## Variable Families

Variable families are groups of related variables (data points) – e.g., variables related to giving by a specific source (alumni, corporations, etc.), for a specific major purpose (current operations, endowment, etc.), or other details.

- Browse or search for word(s) in variable family names. The search is for an exact match, so use partial terms for the most results. (You can skip this input and search for individual variables in the **Variables** section instead of searching by family if you prefer.)
- In the search results:
  - Click the magnifying glass icon to expand a list of all the variables in the family and is the + to add individual variables to the report, OR
  - Click the magnifying glass icon with the + symbol inside it to add all the variables in the family to the report at once.
- You can find more information about locating VSE and Alumni Engagement survey variable families on the [CASE Insights data portal webpage](#) under **Help**.

## Variables

- Browse or search for word(s) in variable names. The search is for an exact match, so use partial terms for the most results.
- Click **+** to add a variable to the report.
- You can find more information about locating VSE and Alumni Engagement survey variables on the [CASE Insights data portal webpage](#) under **Help**.

## Years

- Click **+** to add years to the report.

## Removing an Input

- The right-side column shows your selected report inputs. Click **X** to remove an input.
- After you select all your inputs, click the yellow **Run Report** button that appears at the bottom right of the Edit Inputs screen. The report will open on the screen.
- Click **Save**. Give the report a title, a description (optional), choose whether to [share](#) the report with others at your institution (unit), and select the Active status. The report will be available in your **Saved Reports** going forward.
- Select **Download** to download the report as a CSV file. Choose **Detail** for data by institution. The **Summary** report includes data aggregated by comparison group and year, as well as additional columns for sum, maximum and minimum values, and more, which are not displayed in the onscreen report view. The summary report also includes the details.

## Edit a Saved Report

- On the main menu, expand **Reports** and select **Saved Reports**.
- Browse or search report titles and/or click the gear icon in the rightmost column to filter your view to only those reports created by you or only those reports shared with you by others (the CASE Insights team or other users at your unit).
- When you find a saved report that you want to open, click the **Load** (open folder) icon.
- If you are the creator of the report and wish to modify the original report (i.e., save over the previous version):
  - Click **Edit** to modify the report details such as the title, description, and [sharing](#).

- Click **Edit Inputs** to modify the comparison group or institutions, variables, or years in the report.
- Click **Run Report** to refresh the report with your new inputs.
- Click **Save**.
- If you wish to maintain the original version of your report or the report was shared with you and you are not the original creator of the report, you must **Copy** and **Save** the report to edit it.
  - After copying and saving the report, you can edit it as described.

## Working With Reports Onscreen

When you create or open a report, you can toggle among the following tabs:

- **Info:** General information about the report, including title, description, and creation date.
- **Detail:** Data for each institution in the report.
- **Summary:** Aggregated data by year and comparison group. If you download the summary report, it will also include additional columns for the sum, maximum and minimum values, and more, which are not displayed in the onscreen report view.
- **Drilldown Chart:** Some reports may include a drilldown chart. Click on the chart elements to focus in on a comparison group, variable, or institution.
- **Custom Charts:** Some reports may include custom charts.

When viewing reports on the screen, there are several options to adjust the display. Note that most onscreen changes are not reflected in the CSV file if you choose to download the report.

- Click and hold the column header to drag the column to a new position.
- Use the down arrow in the upper right corner of a column header to sort ascending or descending, hide a column, pin it into place on the left or right, and remove sorting or pinning.
- Open the hidden or “hamburger” menu (the icon is three horizontal lines) that is above the rightmost column of the report to hide and unhide columns in the report.

## Comparison Groups

### Create a Comparison Group

The data portal has many comparison groups created by the CASE Insights team, such as by Carnegie classification and form of control (public/private), that you can use, as well as IPEDS peer groups for those institutions that have them. You can also use comparison groups created by others at your institution that they have opted to share. You can create your own groups of institutions to use as well.

Before creating a comparison group, you may wish to see if one already exists that meets your needs.

- On the main menu, expand **Reports** and select **Comparison Groups**.
- Browse or search for comparison groups, sort by clicking on the column headers, and/or click the gear icon in the rightmost column to filter your view to only those groups created by you or only those groups shared with you by others (the CASE Insights team or other users at your institution that have opted to share).
- View the institutions that are in a comparison group by clicking the **View Detail** icon to its right.

To create a new comparison group:

- On the main menu, expand **Reports**, select **Comparison Groups**, and then click **+ New Comparison Group**, or select **Create New Comparison Group** from the Quick Links menu on the home page.
- Enter a name for the group, a description (optional), choose whether to [share](#) the group with others at your institution (unit), and select the **Active** status.
- Enter your desired search criteria on the **Comparison Group Criteria** screen.
  - **Institution Name, City, State, IPEDS ID:** You can enter multiple selections for each field by entering the first desired search term, clicking **+**, and repeating. Maximum five search terms per field at one time. You can repeat after adding institutions to the group to search for more institutions.
  - **Type of Institution:** Click **Edit** to browse or search and select the type of higher education institution (by Carnegie classification) or independent school (by school type). You can select multiple classifications.
  - **Form of Control:** Click **Edit** to select the form of control (public, private, unclassified).



- **Group is Dynamic:** Dynamic comparison groups use the search criteria to create groups that are always up to date. For example, if you specify certain Carnegie classifications, your comparison group will automatically be updated if an institution's classification changes.

Static comparison groups must be manually populated with institutions and will not change unless manually edited. You would use a static group, for example, if you want to create a list of specifically chosen individual institutions such as a peer group.

- After entering all your criteria, click **Preview Results** (for dynamic groups) or **Search for Institutions to Add** (for static groups).
  - **For dynamic groups:** All the institutions currently meeting your criteria are displayed below and will be included in your comparison group by default. Click **Save**.
  - **For static groups:** Your search results will display on the lower left.
    - Use the **+** button to add individual institutions to your group, OR
    - Use the gear button in the rightmost column header to **Add All (displayed)**, which adds all institutions displayed on this page of the results (you can advance to the next page of results to continue) or **Add All (total)** to add all the institutions in the search results at once.
    - All the institutions you have chosen to include in the group will be displayed under **Selected Institutions** on the right. When you are finished, click **Save**.

### Copy or Edit a Saved Comparison Group

- On the main menu, expand **Reports** and select **Comparison Groups**.
- Browse or search for the group and/or filter your view by clicking the gear button in the rightmost column header.
- To modify a comparison group you have created, click the **Edit** icon.
- If you would like to keep the original group as is, or if you want to modify a comparison group created by someone else, click the **Copy** icon.
- The **Edit (or Copy) Comparison Group** window will open, where you can make changes to the name, description, [sharing](#), and status. Click **Next**.
- To make changes to the comparison group criteria, click **X** next to a selection or institution to remove it. Follow the same instructions as for [Create a Comparison Group](#) to search for and add institutions and save your changes.

## Contact the CASE Insights Team

The CASE Insights team provides data portal support and complimentary training sessions for new or veteran users. Our regular office hours are 9:00 a.m.–5:00 p.m. Eastern time.

Email: [dataminer@case.org](mailto:dataminer@case.org)

Phone: (917) 336-4023