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Login & Reset Password

Login at https://amatlasdata.case.org

1. Click **Forgot your password?** if you have an AMAtlas Data Miner account but do not recall the password or you would like to change your password.

2. Enter your email address to send yourself a link to reset your password. Please note that if you also have an account on the CASE AMAtlas Surveys website (the site that hosts the VSE, Alumni Engagement Metrics, and Talent Management surveys), your password for that account will also reset, as the AMAtlas Data Miner and AMAtlas Surveys site logins are linked.

Contact the AMAtlas team if:

3. You have not yet established a Data Miner account.

4. Your email address is not found in Data Miner.
1. Main Menu
   a. Return to the Home page.
   b. Create a new report.
   c. Open previously used reports cached in your browser.
   d. Access your saved reports and reports that others have created and shared with you, including reports created by the CASE AMAtlas team.
   e. Create a new comparison group. Access your saved comparison groups and groups that others have created and shared with you, including groups created by the CASE AMAtlas team.
   f. Access Data Miner training guides and videos.

2. Announcements
   What’s new in Data Miner and other CASE-related news.

3. Featured Reports
   Publicly available reports created by the CASE AMAtlas team. You can open, copy, and edit the report inputs to change the comparison groups, institutions, years, and variables, to those of your choosing, and save the modified report.

4. Quick Links
   Shortcuts that allow you to quickly create a new blank report, create a new report using your IPEDS peer group (for higher education institutions that have one), go to your saved reports, and create a new comparison group.

5. Recommended Reports
   Quick links to frequently used reports created by the AMAtlas team. You can open, copy, and edit the report inputs to change the comparison groups, institutions, years, and variables, to those of your choosing and save the modified report.
The Data Miner home page displays Featured Reports and has links to Recommended Reports created by the CASE AMAtlas team.

1. Use the arrow buttons to move through all the Featured Reports.

2. Hover your mouse over the chart elements (pie slice, bar, etc.) of a Featured Report to view more information.

3. Open a Featured Report or Recommended Report to view its detail and summary data, download it as a CSV file, or make a copy of it so you can change the report input selections—the comparison groups, institutions, variables, and years that are included in the report—and re-run the report with your chosen selections.

[See Copying & Editing Reports and Downloading & Saving Reports]
Creating a Report with your IPEDS Peer Group

1. Data Miner users from higher education institutions that have an IPEDS peer group will see an option in the Quick Links on the home page to Create New Report Using my IPEDS Peer Group.

2. Click the link to launch a new report that is pre-populated with your institution’s IPEDS peer group and your institution.

3. Specify the Variables and Years you want included in the report. [See Selecting Variables for a Report]

4. After making all your selections, click the yellow Run Report button that appears at the lower right. The report inputs portion of the screen collapses, and the report opens on the screen.
Go to Reports > New Report from the main menu or select Create New Report from the Quick Links on the home page. The Report Inputs screen will display.

You must select at least one comparison group or institution, at least one variable, and at least one year. To do so:

1. Use the arrows to expand/collapse each input section.

For each input type (comparison groups, institutions, variable families*, variables*, and years) you can:

2. Browse the available options.
3. Search for a specific word or words. The search returns exact matches only. If you do not find what you are looking for, try broadening your search term or using a partial word.

Make your report selections by:

4. Clicking the + button to add an input to the report. Your selection will appear on the right.
5. Clicking the x button if you decide to remove a selection.

When you have added all your selections:


*[See Selecting Variables for a Report for more details]*
Selecting Variables for a Report

You can add variables to your report in different ways:

1. **Use Variable Families**, which are groupings of related variables.
   a. Browse the variable family names or search for a term in their names. For example, search for all variable families related to alumni.
   b. Use the **Add** button to add all the variables in the family to your report at once, or
   c. Use the **Search** button to display the variables in the family and select the ones you want to use. The Variable Families section will collapse, and the Variables section just below will expand. Then follow the instructions below.

2. **Use Variables**, which are the individual variables themselves. There are more than 300 variables in Data Miner.
   d. Search for a word or term in the variable name and browse the results.
   
   Note: Abbreviations are sometimes used in variable names (e.g., Curr Ops for Current Operations, Cap Purp for Capital Purposes). Contact the CASE AMAtlas team at vse@case.org if you need assistance locating variables or have questions about what data we collect.
   e. Click + to add variables to your report.
Saving:

1. Click the yellow **Save** button after running a new report or editing an existing report.
2. The **New Saved Report** box will open.
   a. Enter a title.
   b. Enter a description. (Optional)
   c. Set the status to Active. (Inactive is rare.)
   d. Unit administrators can choose to share their report with other users at their institution. Other users can view and copy the report but cannot modify the original report. Select Unit if you wish to share your report or leave it blank if you do not.
3. Click **Save** when you are finished. The report will now appear in your Saved Reports and can be opened again for viewing, copying, editing, and downloading.

Downloading:

4. Click **Download**. Reports are downloaded as CSV files.
5. You will be prompted to choose whether you want to download the detail report (the individual institution data) or summary report (includes aggregated data by year and comparison group). You can also download a custom chart as an image file, if there is one included in the report.
Go to Reports > Saved Reports on the main menu or select Go to My Saved Reports from the Quick Links on the home page to find and open the report you wish to copy or edit. [See Finding & Opening Saved Reports] You can also copy and edit Home page Featured Reports and Recommended Reports after opening them.

For reports that you created, you can edit and save the report. Your edited version replaces the original. Alternately, you can first make a copy of the report to edit and save. This maintains the original version of the report.

For reports created by another user and shared with you—for example, by the CASE AMAtlas team—you must copy it before you can edit it.

1. Click the Copy button to open an untitled copy of the report. Skip this step if you want to edit and replace the original version of the report (only available if you created the report).

2. Select Edit Inputs to change the report inputs (the selected comparison groups, institutions, variables, and years). You can remove existing selections, search and add new selections, and run the modified report. [See Creating a New Report and Selecting Variables for a Report]

3. Save the report after you have made your edits.

4. If you simply want to change the title, description, or status of the report, or if you are a unit or group administrator and want to share or cease sharing the report with users at your institution, select Edit. The Edit Saved Report box opens, allowing you to change those fields and save your changes.
Finding & Opening Saved Reports

Go to Reports > Saved Reports on the main menu or select Go to My Saved Reports from the Quick Links on the home page.

The default view displays all reports to which you have access—those you have created and those created by others and shared with you.

You can view, sort, search, and filter saved reports several ways.

1. **Browse**: Move through the pages of reports. You can also change the number of reports displayed per page.

2. **Search**: Look for a word or words in the report title, description, or owner name.

3. **Sort**: Click on a column header to sort that column A-Z or oldest to newest. Click a second time to sort Z-A or newest to oldest. An arrow shows in the header of a sorted column and indicates the order of the sort (▲ or ▼).

4. **Filter**: Use the filter option to view only the reports you have created, only the reports shared with you by others, or all reports available to you.
   a. The filter icon turns yellow when a filter is in place, and there will be an option to clear the filter.

5. When you locate the report you want, click the Load icon to open it.
1. Use the tabs to view:
   - **Info**: Basic information about the report, such as who created it and when.
   - **Detail**: Individual-institution data.
   - **Summary**: Aggregated data by comparison group and year.
   - **Drilldown Chart**: A click-through chart that focuses in from aggregated data to individual-institution data.

2. Click, hold, and drag to move columns.

3. Use the arrow in the upper-right corner of columns to display a menu that allows you to sort, show and hide columns, and pin columns to the left or right.

4. You can also show and hide columns by opening the menu on the far right above the last column. You will see that there are some columns hidden by default, such as the unique VSE institution ID. Many of the columns hidden by default are primarily used by the CASE AMAtlas team.

5. Move through the pages of the report or change the number of items displayed per page.
Go to Reports > Comparison Groups on the main menu or select Create New Comparison Group from the Quick Links on the home page.

1. Click +New Comparison Group.
2. Enter a name for your group.
3. Enter a description. (Optional)
4. Set the status to Active. (Inactive is rare.)
5. Unit administrators can choose to share their comparison groups with other users at their institution. Other users can view and copy the report but cannot modify the original report. Select Unit if you wish to share your report or leave it blank if you do not.
6. Click Next to select your criteria for adding institutions to your comparison group.
Selecting Comparison Group Search Criteria

You can specify multiple criteria to search for institutions to include in your comparison group.

For the following fields, enter the desired term or value and click +. Repeat as needed.

1. Name
2. City
3. State (2-letter postal abbreviation)
4. IPEDS ID

For the following fields, click the Edit button to open the list and then click the Choose buttons to make your selections.

5. Type of Institution (Higher education Carnegie classification or precollege institution type)
   a. You can enter a search term to narrow the institution-type options.
6. Form of Control (Public, Private, or Unclassified)

For the Group is Dynamic? field:

7. Choose whether you want your comparison group to be dynamic or static. Dynamic comparison groups use the search criteria to create groups that are always up to date. Static comparison groups must be manually populated with institutions and will not change unless edited.

To run your search:

8. If your group is static, you will see a button to Search for Institutions to Add. If your group is dynamic, you will see a button to Preview Results.
Selecting Comparison Group Institutions

For static comparison groups, your search results will show on the lower left. You choose which institutions from the results you wish to add to your comparison group.

1. Use the gear or + buttons to manually add institutions to your group.
2. Use the gear button to add all the institutions displayed on the screen or all the institutions (total) in the search results to your group.
3. Use the + button to add individual institutions to your group.
4. The institutions you choose will show on the right under Selected Institutions.
5. Use the x to remove institutions from the group.
6. Use the page navigation to advance through the results or change the number of results displayed per page.
7. Click Save when you are finished.

For dynamic comparison groups, your search results will show on the lower left.

1. All institutions in the results meet the specified criteria and will be included in your comparison group. The group will automatically be updated if an institution no longer meets the search criteria or if an institution that did not meet the criteria now does.
2. To preview the institutions in your group, use the page navigation to advance through the results or change the number of results displayed per page.
3. Click Save when you are finished.
Viewing, Editing & Copying Comparison Groups

Go to Reports > Comparison Groups on the main menu. You will see a list of all comparison groups available to you.

You can browse, search, sort, and filter the list as you can with saved reports. [See Finding & Opening Saved Reports]

The available action buttons in the last column will be different depending on whether you created the comparison group or not.

1. **Edit:** You can only edit groups you created. For groups created by others and shared with you, you can copy the group and then edit the copy.

2. **Delete:** You can only delete groups you created.

3. **View Detail:** View a list of the institutions that are in a group. You can also copy a group a from the View Detail window.

4. **Copy:** You can copy any group available to you regardless of whether you created it. You are the owner of the copy and can edit or delete it.

When you edit or copy a comparison group:

5. The **Edit Comparison Group** or **Copy Comparison Group** window opens. You can make changes to the name, description, and status. If you are a unit administrator, you can also choose whether to share the group with others at your institution. Click **Next**.

6. The **Comparison Group Criteria** screen opens. Edit your search criteria and selected institutions if you wish. Click **Save**. [See Selecting Comparison Group Criteria and Selecting Comparison Group Institutions]
Contact the CASE AMAtlas Team

For assistance or to schedule a Data Miner training session, contact the CASE AMAtlas team.

Email: vse@case.org
Phone: 917-336-4023