

## CASE Insights Data Portal

### Quick Reference: Using the Voluntary Support of Education Core Data Report

The VSE Survey Higher Education Core Data Report contains more than 25 columns of data from the survey including grand total amount raised, amounts raised by source and by purpose, and more. The report is saved by default with a comparison group with a small number of institutions. Use these instructions to copy and modify the report to include the institutions you are interested in.

- Open the core data report from the **Recommended Reports** section of the [data portal](#) homepage by clicking the yellow **Open** button (folder icon).
- After the report opens, click the **Copy** button near the upper right.
- Click the **Edit Inputs** button near the upper right. You will see a split screen.
  - On the right shows the comparison group, variables, and year currently included in the report.
  - On the left is where you can search for and select the comparison group and/or institutions you want to include in the report. You can add a group and additional individual institutions to a report.
- Click **X** next to the default comparison group listed on the right side of the screen to remove it.
- On the left side of the screen, expand **Comparison Groups** and/or **Institutions** to show the search fields.
- Search for your desired comparison group and/or institutions and click **+** next to the ones in the results that you wish to add to your report. You will see them moved to the selected inputs on the right. Repeat as needed.
  - The comparison group find searches the titles of groups created by you as well as those shared with you by CASE Insights and anyone at your institution who has chosen to do so.
- After you finish updating the report inputs, click the yellow **Run Report** button on the bottom right (you may have to scroll down to see it) to refresh the report with your new selections.
- After the report runs and loads on the screen, you can **Save** the report as well as **Download** it as a CSV file if you wish.
  - Under Download Data as CSV, choose **Detail**, and the report will download.

The higher education core data report under Recommended Reports is for the survey version released in 2022. For the pre-2022 core data report, go to **Reports** and then **Saved Reports** on the main menu and search for “core data.”

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