



Data Miner Quick Start Guide

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ACCESSING THE NEW DATA MINER PLATFORM

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

Contact the VSE staff at vse@case.org or 917-336-4023 to request an account.

We will email you an invitation, active for two weeks, to set up an account on the new Data Miner site. If you miss the two-week window, contact us, and we will send another invitation.

Follow the link in the email to set up your account. If you already have an account for the VSE Survey or Data Miner Classic, you must use the same user name on the new platform. You are not required to use the same password. The minimum password length is six characters.

If you forget your login credentials, go to the login page and click the [Forgot your password](#) link. Enter your email address. You will be emailed a link to reset your password.

DATA MINER ASSISTANCE AND TRAINING

For assistance, contact the VSE staff at vse@case.org or 917-336-4023, or view our Data Miner training videos. There are links to the videos on the Data Miner main menu under [Help](#).

To schedule a complimentary individual or group training session, contact Ann Kaplan at akaplan@case.org or 917-979-4827. Our office hours are 9:00 a.m.-5:00 p.m. Eastern time.

ACCOUNT ADMINISTRATION

For designated unit administrators only

Users with administration privileges can:

- Share reports and comparison groups with others at their institution.
- View all user accounts at their institution.
- View their institution's name, address, and characteristics (Carnegie classification, form of control, IPEDS number). They can update the institution's address as needed. Please contact the VSE staff at vse@case.org if you need to change your institution's name, or you have questions about any of your institutional characteristics.



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HOME PAGE FEATURED REPORTS

The Data Miner home page displays featured reports created by the VSE staff. Hover your mouse over the chart elements to view more information.

Click [Open Report](#) below a feature to open the report. Move through the tabs to view information about the report, detailed and summary data, a drilldown chart, and a custom chart. When the report is open, you can:

- Download the detail and summary reports as CSV files, as well as the custom chart in PDF or JPEG format.
- Copy it. You can then edit the report inputs (comparison groups, institutions, variables, and years) and save the edited version. Note that after editing a copied featured report the custom chart will no longer appear. You must edit the custom chart inputs, as well.

CREATING NEW REPORTS

On the main menu, select [Reports > New Report](#).

You must select at least one comparison group or institution, one variable, and one year. Make your selections on the Edit Inputs screen.

- **Comparison Groups & Institutions:** Browse or search for a comparison group or institution name. Partial names are okay. The VSE staff have created numerous comparison groups available to all Data Miner users. You can also create your own custom groups. [See [Creating Comparison Groups](#).] 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 and 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 summary data for aggregated groups will be returned.

- **Variable Families:** Browse or search for a variable family name. Partial names are okay. Click the magnifying glass with the + symbol inside it to add all the variables in the family to the report at once. Click the regular magnifying glass to open a list of all the variables in the family and select variables individually to add to the report. You can also skip this section and search for variables by name in the Variables section.



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- **Variables:** If you opened a list of variables in a family, they will show here. You can also search for variables by name. Click **+** to add variables to the report.
- **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 your inputs, click the [Run Report](#) button that appears at the bottom right of the Edit Inputs screen.

The report will open. Click the report title, which defaults to Untitled, or the [Save](#) button on the right to save the report. Give the report a title, an optional description, choose if you wish to share the report with others at your unit (*unit administrators only*), and select the report status. If you make the report inactive, and you have shared it with others at your institution, they will not be able to see it until you make it active.

OPEN REPORTS

On the main menu under reports, there is an [Open Reports](#) list. During your session, any report you create, even if it has not yet been saved, and any saved or featured report that you open will appear in the Open Reports list. Unsaved new reports will appear as “Untitled-[#]” in the list until you give them titles and save them. You can easily reopen a report that you have navigated away from by clicking the title in the Open Reports list. If you do not save a report that you have created, and you exit the Data Miner program, that report will not be available in your open or saved reports at your next session.

EDITING REPORTS

To open a previously saved report or a report that has been shared with you, go to [Reports > Saved Reports](#) on the Main Menu. You can browse or search for reports. Use the page menu below the list to advance or to change the number of items that display per page. Or, click the [Filter](#) or gear icon in the rightmost column to filter your view to only those reports created by you, only those reports shared with you by others (the VSE staff and other users at your unit), or all reports available to you. When you find a saved report you want to open, click the [Load](#) or open folder icon.



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If you originally created the report, after opening it, you can edit the report details such as the title, description, status, and whether the report is shared with others at your institution (*unit administrators only*) by clicking the [Edit](#) button. You can edit the report inputs, such as comparison groups, variables, and years, by clicking [Edit Inputs](#).

IMPORTANT NOTE: If you open and edit the inputs of a saved report, then save it, the edited report will save over and replace the previous version. If you wish to keep the original report with its originally selected inputs and save the edited version separately, click the [Copy](#) button before making any edits. An untitled copy of the report will open. Click [Edit Inputs](#). After making the desired changes to your report selections, save the report with a new name. The original report that you copied will remain and your newly saved version will be added to your saved reports.

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, who created it, if it is shared with others, and when it was created.
- **Detail:** View the selected data variables by the selected years for each institution within your chosen comparison groups. Use the page menu below the report to advance or to change the number of items that display per page.
- **Summary:** View summary or aggregated data by years and comparison groups. Use the page menu below the report to advance or to change the number of items that display per page. 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 by default in the onscreen report view.
- **Drilldown Chart:** Click on the chart elements to focus in on a comparison group, variable, or institution. Click variable names in the chart legend to remove variables from the view and to restore them. Use the back button to return to the previous level.
- **Custom Charts:** Some reports may include custom charts. The tab will show the title of the chart followed by the chart icon.

When viewing the detail and summary reports onscreen there are several options to manipulate the display. Note that most onscreen changes are not reflected when you download the report as a CSV file.

- Click and hold the column header cell to drag the column to a new position.



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- 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.
- Use the menu above the rightmost column of the report (the icon is three horizontal lines) to hide columns, restore hidden columns, and unhide additional columns that are hidden by default, such as the VSE Institution ID. Summary reports include hidden columns for sum, minimum and maximum values, and more. These columns are included when you download a summary report as a CSV file. Some of the hidden report columns, such as cycle ID, are primarily relevant to the VSE staff.

CREATING COMPARISON GROUPS

The VSE staff have created many comparison groups, but you can create your own groups relevant to you, such as peer and aspirant groups. In addition, unit administrators can share their comparison groups with other users at their unit. Other users can use shared groups in their reports but cannot edit the groups.

Before creating a comparison group, you may wish to see if one already exists that meets your needs. Go to [Reports > Comparison Groups](#) on the main menu. You can browse or search for groups. Use the page menu below the list to advance or to change the number of items that display per page. Or, click the [Filter](#) or gear icon in the rightmost column to filter your view to only those groups created by you, only those groups shared with you by others (the VSE staff and other users at your unit), or all reports available to you.

To create a comparison group click [+ New Comparison Group](#). Enter a name for the group, an optional description, choose if you wish to share the group with others at your unit (*unit administrators only*), and select the status. If you make the status inactive, and you have shared the comparison groups with others at your institution, they will not be able to see it until you make it active.

On the [Comparison Group Criteria](#) screen you can choose whether you want your group to be dynamic. If you choose no, your list will be static and retain your original selections until you manually add or remove institutions. If you choose yes, institutions that no longer meet the criteria you selected to create the list – for example, a specific Carnegie classification – will automatically be removed from the group, and institutions that now meet the criteria will automatically be added.

- **Create a Dynamic Comparison Group:** Change the Dynamic status to yes. Enter your search criteria such as Carnegie classification, form of control, state (2-letter U.S. postal abbreviation), etc. Click [Preview](#). All the institutions currently meeting your criteria are displayed below. Click [Save](#).





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- **Create a Static Comparison Group:** Leave the Dynamic drop-down set to no. You can search individual institution names or make a combination of selections such as Carnegie classification, form of control, state (2-letter U.S. postal abbreviation), etc. Click [Search for Institutions to Add](#). The results will display. Use the page menu below the list to advance or change the number of items that display per page. Click + to the right of an institution's listing to add it to the group. It will be added to the [Selected Institutions](#) below. Repeat as needed. Or, click the [Add](#) or gear icon in the rightmost column header, and choose Add All (displayed) to add all institutions displayed onscreen – this will add only the currently visible page of results, not all results – or Add All (total) to add all institutions that are in the search results. You can then perform another search if you wish to add more institutions to your group. When you are finished, click [Save](#).

EDITING COMPARISON GROUPS

You can only edit a comparison group you have created. Browse or search for the group you want to edit, or filter your view by clicking the [Filter](#) or gear icon in the rightmost column header. Click the [Edit](#) icon to the right of the group's listing. Make any changes to the title, description, or settings, and click [Next](#).

- **Edit a Dynamic Comparison Group:** Make the desired changes to the search criteria. Click the [Preview](#) button to display all institutions that currently meet your new criteria. Click [Save](#).
- **Edit a Static Comparison Group:** Scroll down to the [Selected Institutions](#) list. Use the X next to an institution name if you wish to remove it from the group. Scroll back up to search for institutions by name or characteristics, click [Search for Institutions to Add](#), and add them as you would when creating a new static comparison group. Repeat as needed. Click [Save](#) when you are done.

CONTACT THE VSE STAFF

The VSE staff provides Data Miner support and complimentary training sessions for new or veteran users. Our regular office hours are 9:00 a.m.-5:00 p.m. Eastern.

Email: vse@case.org

Phone: (917) 336-4023

