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## ACCESSING AMATLAS DATA MINER

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

Contact the CASE AMAtlas team at [vse@case.org](mailto: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 AMAtlas 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 on the CASE AMAtlas Surveys website (the site that hosts the VSE, Alumni Engagement Metrics, and Talent Management surveys), use the same user name and password. If you create a different password in Data Miner, your AMAtlas Surveys account password will change also.

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. The new password will be applied to your AMAtlas Data Miner account and your AMAtlas Surveys account, if you have one.

## AMATLAS DATA MINER ASSISTANCE AND TRAINING

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

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

## ANNOUNCEMENTS

Look on the AMAtlas Data Miner home page for announcements about new and improved functionality and other CASE-related news.

## HOME PAGE FEATURED & RECOMMENDED REPORTS

The AMAtlas Data Miner home page displays featured reports and has links to recommended reports created by the CASE AMAtlas team. Hover your mouse over the elements of a featured report's chart to view more information.

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

- Download the detail and summary reports as CSV files, as well as any custom chart in PDF or JPEG format.
- Copy it. You can then edit the report inputs (comparison groups, institutions, variables, and years), re-run the report with the new selections, 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.

## HOME PAGE QUICK LINKS

The AMAtlas Data Miner home page has a collection of links that allow you to quickly create a new report or comparison group or go to your saved reports.

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

## CREATING NEW REPORTS

On the main menu, select [Reports > New Report](#) or select [Create New Report](#) from the Quick Links.

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. AMAtlas Data Miner has many comparison groups created by the CASE AMAtlas team, as well as IPEDS peer groups for those institutions that have them. 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 the comparison groups will be returned.

- **Variable Families:** Browse or search for a variable family name. Partial names are okay. Click the [Add](#) button, the magnifying glass with the + symbol inside it, to add all the variables in the family to the report at once. Click the [Search](#) button, the plain 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.
- **Variables:** If you chose to search a list of variables from a variable family, those variables will display here, and you can browse them. If you did not search a variable family, all the variables in AMAtlas Data Miner will display. You can browse them or search for a word in their names. 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, and select the Active status. (Inactive status is rare.) If you are a unit administrator, also choose whether to share the report with others at your institution.

## OPEN REPORTS

On the main menu under Reports, there is a list of [Open Reports](#). These are cached reports that you have used, including new reports you have created. Click on a report in the list to open it. Unsaved new reports will appear as “Untitled-[#]” in the Open Reports list until you save them. Clearing your browser cache or refreshing your browser will clear the Open Reports list.

## 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  (gear) button 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 AMAtlas team and other users at your unit). When you find a saved report you want to open, click the [Load](#) or open folder icon.

If you originally created the report, click the [Edit](#) button after opening it to edit the report details such as the title, description, and status. If you are a unit administrator, you can also choose whether the report is shared with others at your institution. 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 data 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.
- 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 institution's unique VSE 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 CASE AMAtlas team.

## CREATING COMPARISON GROUPS

AMAtlas Data Miner has many comparison groups created by the CASE AMAtlas team, as well as IPEDS peer groups for those institutions that have them. You can also create your own groups relevant to you, such as peer and aspirant groups. In addition, unit administrators can share their comparison groups with the other Data Miner users at their institution. The other users may not edit the original comparison groups, but they can use the shared groups in reports, as well as make a copy of any group that they wish to edit and save. [See [Copying and Editing Comparison 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 comparison groups, sort by clicking on the column headers, or click the  (gear) button 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 AMAtlas team and other users at your unit). Use the page menu below the list to advance or to change the number of items that display per page. You can view the institutions that are in a comparison group by clicking the [View Detail](#) icon in the last column.

To create a comparison group, click [+ New Comparison Group](#). Enter a name for the group, an optional description, and select the Active status. (Inactive status is rare.) If you are a unit administrator, also choose whether to share the group with others at your institution.

Enter your desired search criteria on the [Comparison Group Criteria](#) screen.

- **Name, City, State, IPEDS ID:** You can enter multiple selections for each field by entering the first search term, clicking +, and repeating.
- **Type of Institution:** Click the [Edit](#) icon to select the type of higher education institution (Carnegie classification) or precollege institution. You can select multiple classifications.
- **Form of Control:** Click the [Edit](#) icon to select the form of control. You can select multiple options.
- **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 or precollege institution types, your comparison group will automatically be updated if an institution's classification changes and no longer meets the search criteria or if an institution that did not meet the criteria now does. Static comparison groups must be manually populated with institutions and will not change unless edited. You would use a static group, for example, if you want to create a list of specifically chosen, named institutions.

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. Use the page menu below the display if you wish to advance through the list or change the number of items displayed per page. Click [Save](#).
- **For static groups:** Your search results will display on the lower left. Use the page menu below the display if you wish to advance through the list or change the number of items displayed per page. Use the + button to add individual institutions to your group, or use the  (gear) button 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 the institutions that are in the search results. 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](#).

## COPYING AND EDITING COMPARISON GROUPS

Go to [Reports > Comparison Groups](#) on the main menu. Browse or search for the group or filter your view by clicking the  (gear) button in the rightmost column header.

To copy a comparison group, click the [Copy](#) button to the right of it. The [Copy Comparison Group](#) window will open, where 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](#). Make changes to the comparison group criteria if you wish [See [below](#)] and then click [Save](#).

To edit a comparison group that someone else created and shared with you, first make a copy of it as described above. To edit a comparison group that you created, click the [Edit](#) button to the right of it. The [Copy Comparison Group](#) window will open, where 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](#). Make changes to the comparison group criteria and selections.

- **For dynamic groups:** Use the [x](#) buttons to remove previously chosen criteria as desired. Use the criteria search fields to specify additional criteria. Click [Preview Results](#) and then [Save](#). [See [Creating Comparison Groups](#) for more on criteria selection and previewing results.]
- **For static groups:** Use the [x](#) buttons to remove previously selected institutions and search criteria as desired. Use the criteria search fields to specify additional criteria. Click [Search for Institutions to Add](#). Use the [+](#) or  (gear) buttons to add institutions to your group and then click [Save](#). [See [Creating Comparison Groups](#) for more on criteria selection and adding institutions.]

## CONTACT THE CASE AMATLAS TEAM

The CASE AMAtlas team provides AMAtlas 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](mailto:vse@case.org)

Phone: (917) 336-4023