Handy Reference Guides

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Dashboard Overviews & Tips

THE FIRST TWO DASHBOARDS DO NOT INCLUDE STUDENT INFORMATION.

Academic Offerings
Information about the possible academic pathways that students may undertake, both degree-seeking and non-degree-seeking.
Present an integrated view of the entire Career-Program-Plan-Subplan hierarchy. Includes minors, honors, etc.
What programs/plans are offered in my school?

Academic Structure Components
A more dictionary-style view of the main pieces of the Academic Structure.
Good for looking up codes, or other information specific to one component.
What does the Acad Plan Type IHN stand for?

Census All Enrollment
Quarterly snapshot of the student population. Reports data from the academic year 2012-13 onward.

Census Autumn Enrollment
Annual snapshot of the student population based in Autumn Quarter. Reports data from the academic year 2002-2003 to the most recently available census year.

Class Enrollment Summary
Information about students, classes that they are/have enrolled in, and their plans (current or at the time when they took a particular class).
For a specific class, what are enrolled students’ current academic plans?

Counting Classes and Enrollment Summaries
View enrollments and headcounts at both the class section level and at the course level, depending on the tab you choose.
Includes class sections with zero enrollments (discussion sections, etc.).
In the School of Engineering, which undergraduate class had the highest enrollment last spring?
Course Taking By Plan and Subplan
Information on popular courses among students in specific academic plans and subplans.

Crosslisted Classes
Information on crosslisted classes. View the class sections either individually (second tab), or as one combined row (third tab).

How many undergrads, and grad-students, took MATSCI 151 (aka MATSCI 251) last Autumn Quarter?

Degrees Conferred
Information about degrees conferred since the summer of 1984. Currently only “Study Field Count” is available; this counts undergrads under each major plan they completed. Other counts will be available later.

Among degree recipients, what have been the most popular UG majors over the years? How many PhDs in History were conferred in the summer start year 2014-2015?

My Department
Information on an academic department’s students (current and former), classes, and instructors.

Who is teaching course X and what have they taught before?

Plan and Term Enrollment
Information on student plan enrollment by term. Status at the end of the term is used; therefore these counts will not exactly match the official census counts, which are usually as of the 3rd-4th week of the term. Also data before the 3rd-4th week will be inflated, before term cancel occurs.

What is the enrollment history for a given student? What about for a given department or study field?

Teaching Activity by Instructor Group
Trend information on which groups of instructors are teaching students at Stanford. The first tab allows you to choose a 5- or 10-year span, and to anchor that span in a final year.

Data are available from the year 2002-2003 forward.

How many students (headcount) are taught by each type of instructor?
REFERENCE GUIDE 2

List of Dashboards & Reports

Academic Offerings
(Overview)
- All Programs/Plans/Subplans
- Degree-Granting Plans
- Non-Degree-Granting Plans
- Subplans by School

Academic Structure Components
(Overview)
- Named Academic Org
- Named Academic Org Hierarchy
- Academic Career
- Academic Group
- Academic Program
- Academic Plan
- Academic Plan Type
- Academic Subplan
- Degree

Census All Enrollment
(Overview)
- Census Counts
- Multi-Year Trend

Census Autumn Enrollment
(Overview)
- Census Counts
- Degree Level and Type
- Gender
- URM Ethnicity
- Gender and URM Ethnicity

Class Enrollment Summary
(Overview)
- Detailed Class Enrollment List
- Class Student Characteristics
- Drill through to Secondary Class
- Grade Distribution
Counting Classes and Enrollment Summaries
(Overview)
Class Counting and Enrollment – Class level view
Class Counting and Enrollment – Course level view
School Subject Enrollment Trends
One Course Over Time

Course Taking By Plan and Subplan
(Overview)
Course Taking – By Acad Plan

Crosslisted Classes
(Overview)
Crosslisted Class Detail
Crosslisted Class by Parent Course
Detailed Crosslisted Class Enrollment List

Degrees Conferred
(Overview)
Degree Study Field Totals
Degree Study Field by Gender
Degree Study Field by URM
Degree Study Field Top UG Majors

My Department
My Current Students
My Former Students
Single Student
Class Roster
My Classes
My Instructors
Single Instructor

Plan and Term Enrollment
(Overview)
Plan Enrollment Counts by Term
Plan Enrollment Student List
Term Enrollment History for a Student

Teaching Activity by Instructor Group
(Overview)
Teaching Activity by Instructor Group

09/2021
REFERENCE GUIDE 3

Using an OBI Dashboard

1. **Go to the website:** [https://bi.stanford.edu](https://bi.stanford.edu)
   Firefox is the recommended browser. You will need to do WebAuth if you haven’t already. You can have multiple instances open at a time.

2. **Select desired dashboard**
   At the top, under “Dashboards”, go down to “Student Analytics”. Pick the dashboard you want.

3. **Select desired report**
   Click on the report tab you are interested in.

4. **Adjust the Selection Criteria at the top**
   The report will always come up with default Selection Criteria filled in. Change the criteria to what you are interested in. Putting in no criteria for a particular field means return everything.

   *Sometimes there are required criteria that must be filled in.*
   Click “Apply” when you are done

5. **Customize the dashboard if desired**
   You may re-order, re-sort, remove, rearrange columns and even drill down in some cases.
   SAVE the customization if you would like to keep it for future use (click on the settings “wheel” in the upper right corner of the dashboard, select Save Current Customization…)

6. **Print or export data if desired**
   At the bottom of each report section, there will be the options to Refresh, Print or Export.

   *Refresh* - *Print* - *Export*

   Refresh would be used in a situation where you had live data changing (not the situation here).

   **Print:** either PDF or HTML. The PDF one is often a little nicer looking, with shaded headers, and already sized to fit normal 8.5x11 pages. However sometimes it’s strangely laid out.

   **Export to Excel:**
   Choose Data, then CSV format would be the usual recommendation -- except leading zeros on EMPLIDs get lost this way. The best strategies are:
   1) Arrange the data in OBI in tabular format with no grouping -- for instance, put the EMPLID on the far left. Then you can export in Excel format.
   2) Export in CSV format but make sure it doesn’t auto-open in Excel. Import it into Excel as a text file and use the parsing wizard to say Emplids are text.

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**BONUS: Customizing your OBI “home” page to be a Student Analytics dashboard**

- Go to top right corner where your name shows, click the down arrow and pick My Account
- Under preferences, pick your desired Starting Page and then click OK. When you refresh the page or next log on to OBIEE, you will start at that page.
REFERENCE GUIDE 4

Using the Data Dictionary

1. **Go to Stanford’s Data Governance Center:** [https://dgcenter.stanford.edu](https://dgcenter.stanford.edu) (Note: You must be on the Stanford network, either through direct or wifi connection or through VPN)

2. **Search:** You can search for an existing term by typing it into the search field at the top right.

3. **If desired, Comment:** If you feel a definition is not quite correct or perhaps you have more information to add about the term, you can Submit a Comment. At the top left of each page for an individual term, you will see its Name in white, and its Type and Status. Underneath that information is the phrase “Submit Comment”. Click on it, provide identification about yourself, then leave a comment.
One of the important things to understand about the Academic Structure is that it looks different for undergrads vs. grads, and for degree-seekers vs. non-degree-seekers. It also varies in how different schools have chosen to use it.

Much of the reporting has been designed around the Acad Plan level and the Acad Plan owning org, as it typically provides more information, especially for undergraduates. Dashboard users do not need to understand the Academic Structure in detail, but Ad Hoc users need to know it, in order to pick the right student populations.

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### Understanding Academic Structure, with examples

<table>
<thead>
<tr>
<th>High Level Academic Track</th>
<th>Can differ in calendar, grading, transcript, tuition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admit/Graduating Entity</td>
<td>Students apply to, are admitted, and graduate at the Program level.</td>
</tr>
<tr>
<td>Study Field/Degree etc.</td>
<td>Plans lay out the specifics of what requirements students are pursuing.</td>
</tr>
<tr>
<td>Specialization (optional)</td>
<td>Plans may have Subplans to indicate a further level of specialization or emphasis.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Degree-seeking</th>
<th>Degree-seeking</th>
<th>Non-degree-seeking</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAREER</td>
<td>UG</td>
<td>GR</td>
</tr>
<tr>
<td>Group</td>
<td>UG</td>
<td>H&amp;S</td>
</tr>
<tr>
<td>PROGRAM</td>
<td>UG</td>
<td>LING</td>
</tr>
<tr>
<td>Program Owning Org</td>
<td>VPUE</td>
<td>LINGUISTIC</td>
</tr>
<tr>
<td>PLAN</td>
<td>ANTHR-BAH</td>
<td>LING-PHD</td>
</tr>
<tr>
<td>Plan Owning Org</td>
<td>ANTHRO</td>
<td>LINGUISTIC</td>
</tr>
<tr>
<td>Plan Type</td>
<td>HON</td>
<td>MAJ</td>
</tr>
<tr>
<td>Study Field</td>
<td>Anthropology</td>
<td>Linguistics</td>
</tr>
<tr>
<td>Degree</td>
<td>BA</td>
<td>PHD</td>
</tr>
<tr>
<td>SUBPLAN</td>
<td>-</td>
<td>LINGPHD1</td>
</tr>
</tbody>
</table>
Deciphering term codes
Internally, terms are represented in PeopleSoft with 4-digit term codes. These are not very user-friendly, but they’re efficient and they sort in the correct chronological order. We will usually supply more user-friendly labels on reports; however for various reasons you will still need to enter term codes for selection criteria. Here’s how to figure them out:

<table>
<thead>
<tr>
<th>Century: 0 = 1900’s 1 = 2000’s</th>
<th>Academic year: 15 = last two digits of the ending year of the academic year, e.g. 15 means 2014-2015</th>
<th>Term: 2 = Autumn 4 = Winter 6 = Spring 8 = Summer</th>
</tr>
</thead>
</table>

The term codes for the current year are:
- 1162 = autumn 2015-16
- 1164 = winter 2015-16
- 1166 = spring 2015-16
- 1168 = summer 2015-16

How Much History is There?
We are still in the process of figuring out exactly where there’s history and where there isn’t. We rely on what’s in PeopleSoft, so for the years before PeopleSoft (PS) was implemented (usually the 2002-2003 year is considered the first full PS year), it depends on whether or not the data was converted from the prior legacy system NSI (Network for Student Information).
Academic history (what programs/plans students were in) is pretty good, at least for the PS years, but other kinds of history (e.g. citizenship) may be non-existent or spotty.

<table>
<thead>
<tr>
<th>STUDENT DATA ERA</th>
<th>YEARS INCLUDED</th>
<th>What Data is Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>The beginning of time</td>
<td>1/1/1901</td>
<td>Placeholder date (real date unknown)</td>
</tr>
<tr>
<td>PREHISTORIC</td>
<td>1891 through 1931-32</td>
<td>Nothing; paper files somewhere perhaps?</td>
</tr>
<tr>
<td>DARK AGES</td>
<td>1931-32 to 1983-84</td>
<td>Very little; occasional bits of data, e.g. earlier records of someone who returned.</td>
</tr>
<tr>
<td>INDUSTRIAL REVOLUTION (aka the NSI years)</td>
<td>1984-85 to 2001-02</td>
<td>Some NSI data converted to PS; all degree conferrals seem to be included</td>
</tr>
<tr>
<td>PEOPLESOFT YEARS</td>
<td>2002-03 through the present</td>
<td>Base enrollment info should be reasonably complete.</td>
</tr>
<tr>
<td>The misty fog of the future</td>
<td>12/31/2099</td>
<td>Placeholder date (= still going on, no end)</td>
</tr>
</tbody>
</table>
Resources

GETTING HELP

- Contact us at siris-support-team@lists.stanford.edu

LEARNING MORE OBIEE TIPS & TRICKS

OBIEE is a widely-used tool. One can often google for tips, if you know what you’re looking for. Hopefully additional OBIEE classes may be added in the future.

Other OBIEE training sessions at Stanford:
- Introduction to the Stanford BI Portal class, AS-6005 (2 hr. classroom class, in STARS)
- Introduction to OBI Financial Reporting, FIN-0340 (online class in STARS, requires completing a Financial Confidentiality Agreement first, and is finance-oriented, but can be a helpful overview)

KEEPING IN TOUCH, GIVING FEEDBACK, GETTING TIPS

- Website: siris.stanford.edu
- Confluence: https://asconfluence.stanford.edu, then search for “SIRIS EA Feedback”. We have a Google spreadsheet for system feedback, and a survey for training feedback.
- Mailing lists: Our primary mailing list is siris-news-updates@lists.stanford.edu. A newsletter and other periodic updates will be sent to this list, telling you about projected releases, changes, down-times, etc. We hope to also publish interesting tips and tricks and information about the data.

WE ENCOURAGE YOUR CONTINUED FEEDBACK AND SUGGESTIONS!