evisions

IRIS

Institutional Research Information Solution

IRIS User Guide

Product version 1.7.0

Last updated 2/6/2020

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What is IRIS?

IRIS is an easy-to-use application that assists higher education institutions with the aggregation of IPEDS[1] survey data for review, approval, and submission to the Department of Education. IRIS stores all information securely in the cloud, making it simple for multiple simultaneous users from across your institution to review and share survey data. Users receive electronic notifications whenever an action is required, allowing the survey to proceed smoothly through each step of the process from creation to final approval.

The survey data comes from a selection of Argos DataBlocks provided by Evisions. Institutional Research users run each DataBlock and upload its output into IRIS, which validates the input and uses it to fill out the necessary IPEDs surveys for your institution. Users from various departments can then collaborate to review and correct the data before final approval.

IRIS assists with data validation by ensuring all required information is present and in the appropriate format. IRIS also compares the current data with your institution's data from the previous year, highlighting any inconsistencies for review. Multiple users can comment on individual data points, assign and track tasks, and monitor the completion status of the surveys.

Once a survey has been completed, you can download the data in a single file for easy upload into the IPEDS data portal.

IRIS:

- Provides a comprehensive electronic solution for your IPEDS-related activities.
- Tracks and manages IPEDS surveys in a single location.
- Saves time by reducing manual entry, automating your survey submissions, improving your survey process, and working solely off of targeted data.
- Saves money and eases the burden on IT with a secure, centralized solution.
- Increases data accuracy, reducing the chance of penalties and negative press.
- Allows you to easily compare your IPEDS data against industry benchmarks.

System Requirements

- Display with 1024x768 or higher resolution.
- Internet Explorer 11, Microsoft Edge, Mozilla Firefox, or Google Chrome for PC.
- Safari, Firefox, or Chrome for Mac.

New Features

For full details, refer to the release notes.

Version 1.7

- Support for importing data from Evisions DORIS for use in IPEDS surveys.

[1] IPEDS stands for Integrated Postsecondary Education Data System. It is a system of 12 interrelated surveys conducted annually by the National Center for Education Statistics within the United States Department of Education. Components of the 12 surveys are collected over the Fall, Winter, and Spring reporting periods each year. The completion of all IPEDS surveys is mandatory for all institutions that participate in any federal assistance program authorized by Title IV of the Higher Education Act. IRIS provides a way for you to electronically collect, submit, and report against IPEDS data.

Version 1.6.2

- Validation error messages enhanced to provide more specific information for troubleshooting.

Version 1.6.1

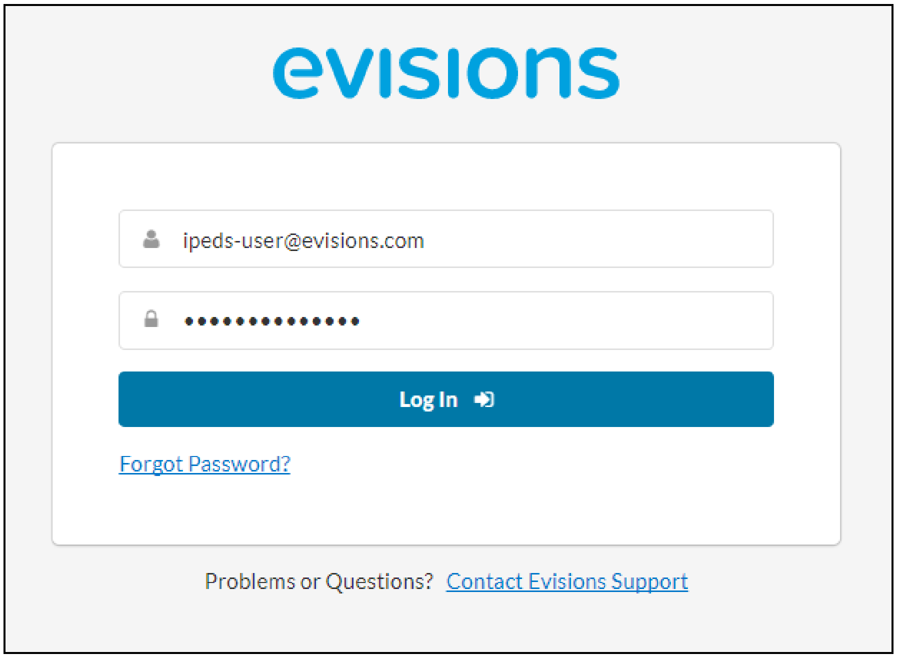
- Added support for display of IPEDS reports via the Evisions IPEDS Visualizations application for Salesforce.
- Updated the Outcome Measures survey to exclude individuals with a status of Unknown.
- Updated the 200% Grad Rates survey calculations to correctly use the historical data.

Version 1.6

- Added 2017-18 prior year values to the following 2018-19 surveys:
  - Completions
  - 12-month Enrollment (all versions)
  - Finance for non-degree-granting public institutions using GASB reporting standards
  - Finance for non-degree-granting private, not-for-profit institutions and public institutions using FASB reporting standards
  - Finance for non-degree-granting private, for-profit institutions
- Updated survey forms for the 2019-2020 collection period.
- Removed validations pertaining to field DA02 in Part A of the Institutional Characteristics survey, due to its removal from the import specification.

Logging In

This is the login screen for IRIS.



Enter your email address and password at the prompt. Then, select **Log In** to launch IRIS.

If you have any difficulty, you can use the Forgot Password link, or contact Evisions Support.

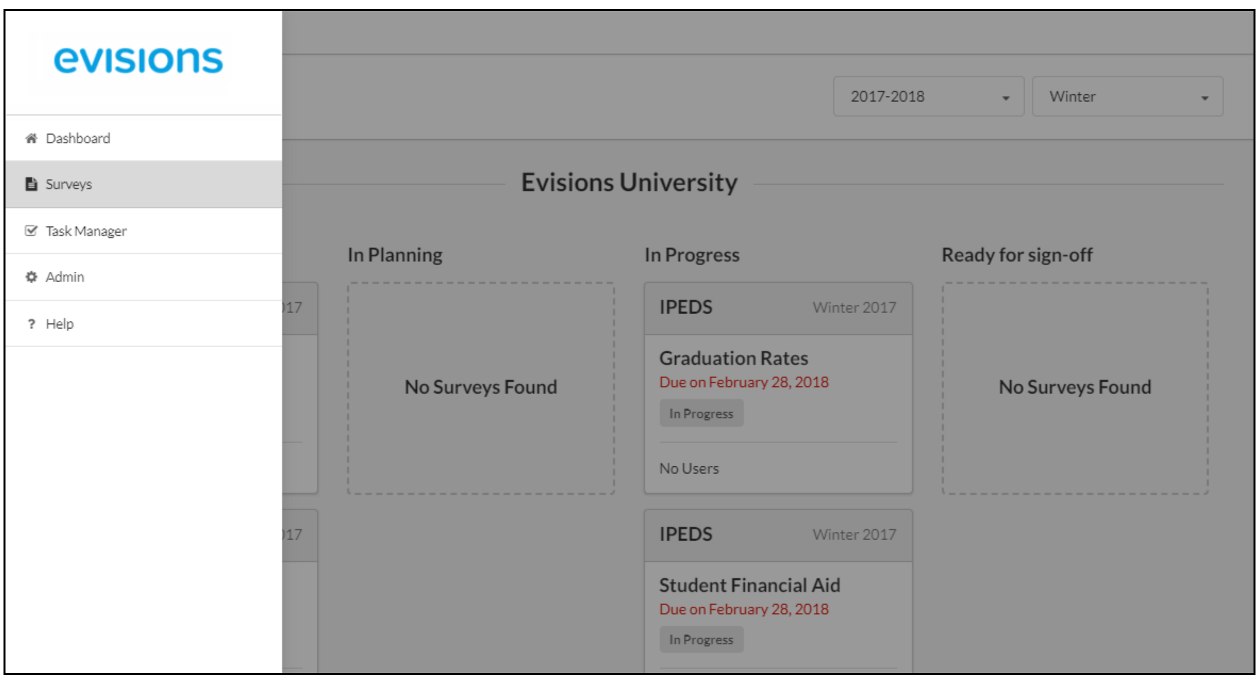
Navigating IRIS

Dashboard

When you first log in to IRIS, the **Dashboard** screen presents you with a quick overview of any surveys you are involved with or that require your attention.

Surveys

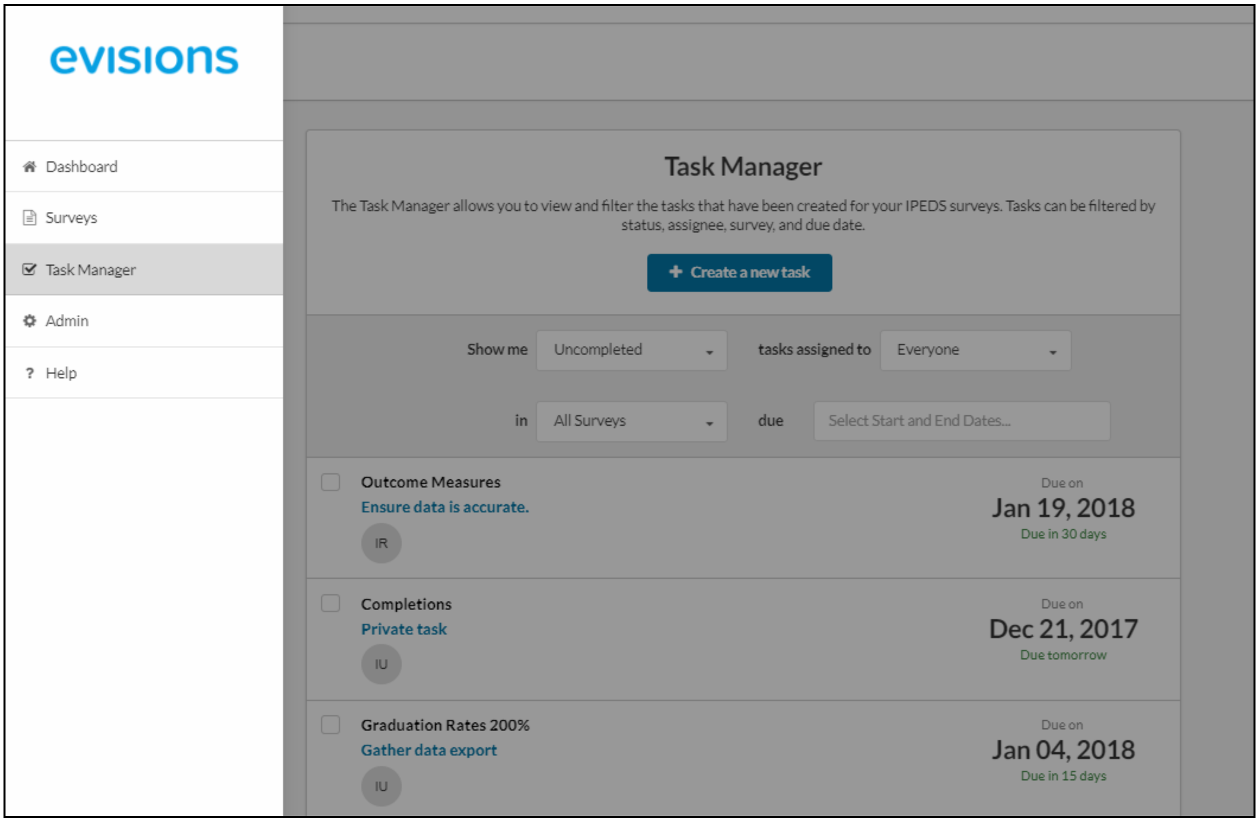
The **Surveys** screen lists all of the surveys that you have access to. Select any survey to view its details.



- **Users** see all surveys that they are involved with as a survey owner, reviewer, approver, or submitter.
- **Admins** can see all surveys in the system.

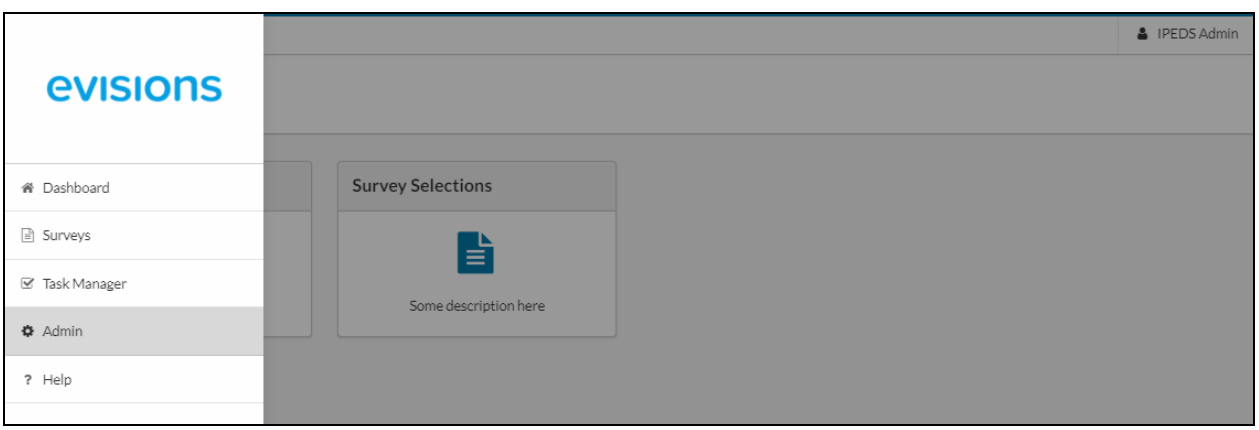
Task Manager

The **Task Manager** lists all tasks in the system that you have permissions to see. Tasks can be filtered based on user, survey, due date, and completion status.



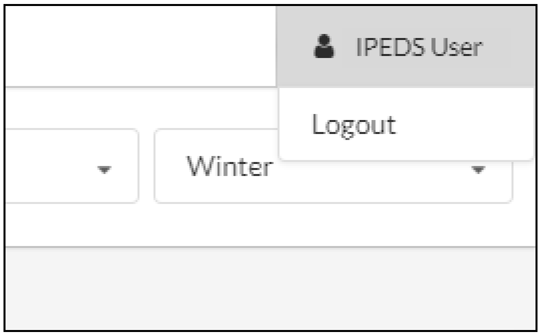
Admin

The Admin Dashboard is available to administrators only. It allows administrators to configure users and choose which surveys are enabled for your institution.



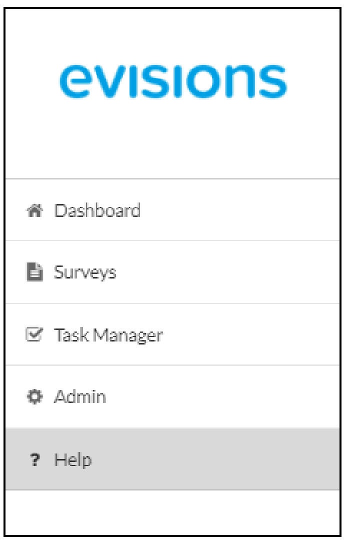
User Settings and Actions

Selecting your name in the upper right corner of IRISdisplays a dropdown menu allowing you to log out.



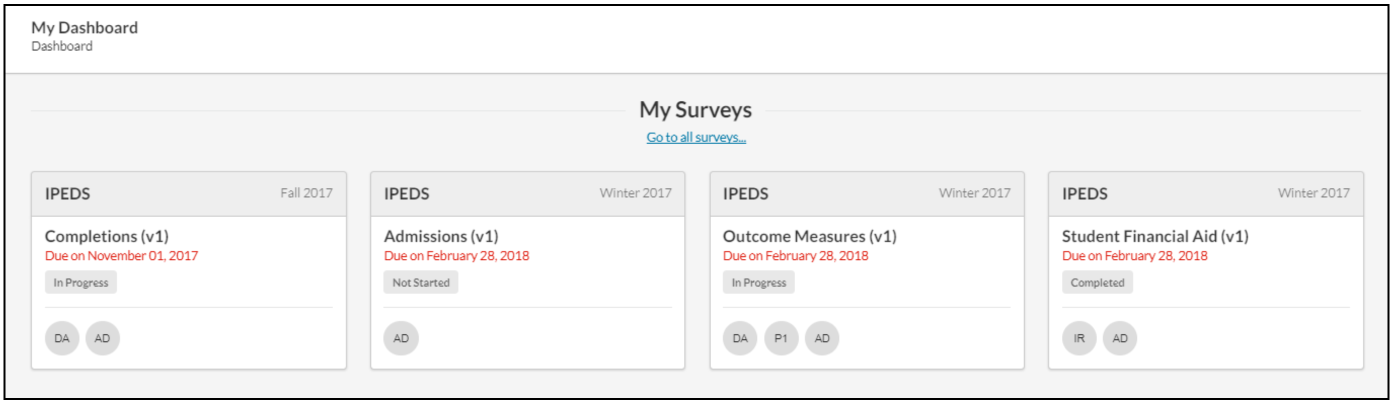
Help

The **Help** menu option opens this in-product Help in your browser. The Help also contains release notes for this and all previous versions of IRIS.



Dashboard

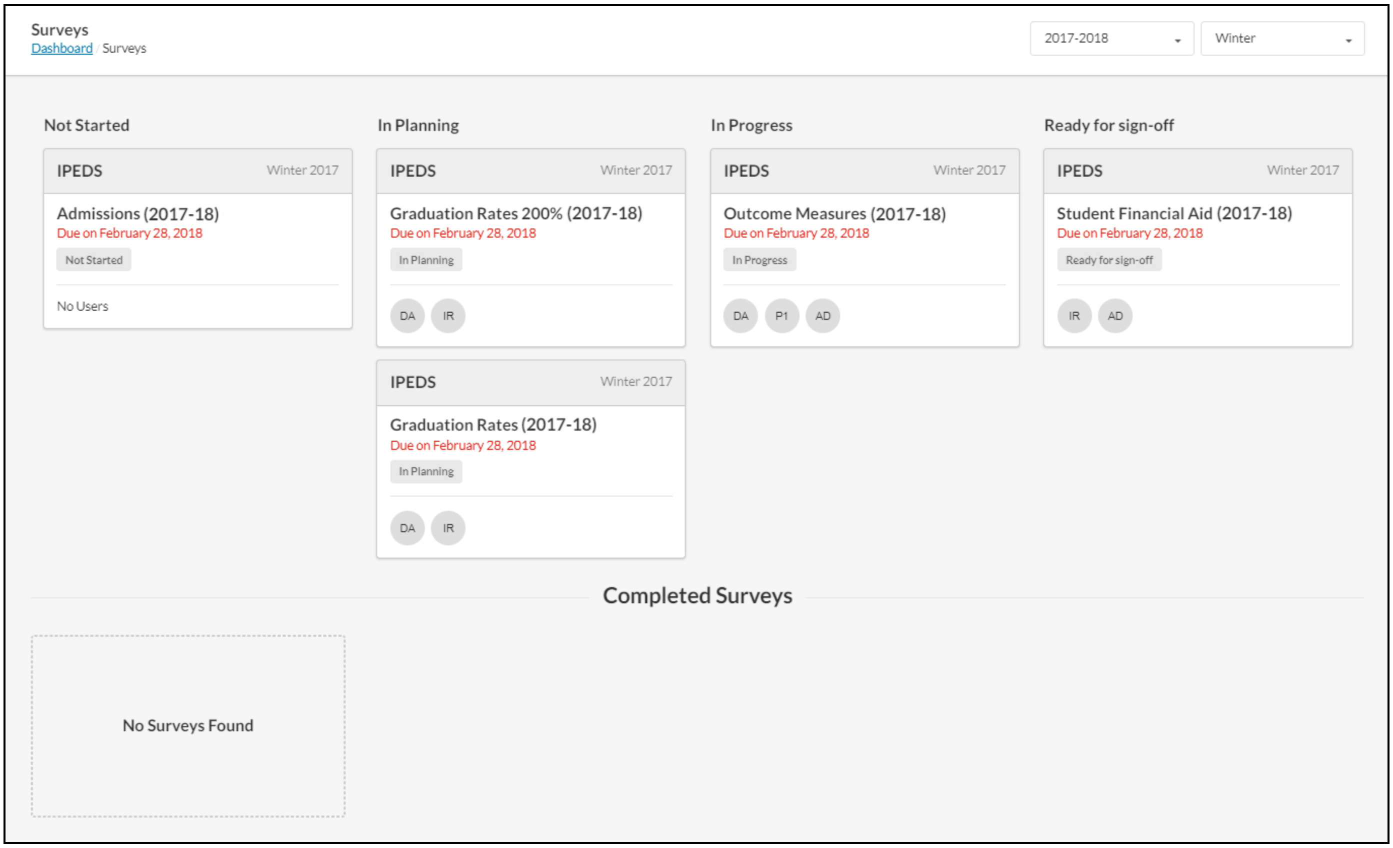
When you first log in to IRIS, you will be taken to your **Dashboard**. This screen provides an overview of the surveys to which you have been assigned as a survey owner, reviewer, approver, or submitter.



The surveys are listed in order by data collection period (Fall, Winter, or Spring). Select any survey to view its survey dashboard, where you can upload data, view the form, create tasks associated with the survey, or view reports based on the imported data.

Surveys

The Surveys screen allows you to view all of the current and past surveys for your institution. Uncompleted surveys for the current data collection period are listed at the top of the page, with completed surveys underneath. The uncompleted surveys are organized in columns by status.

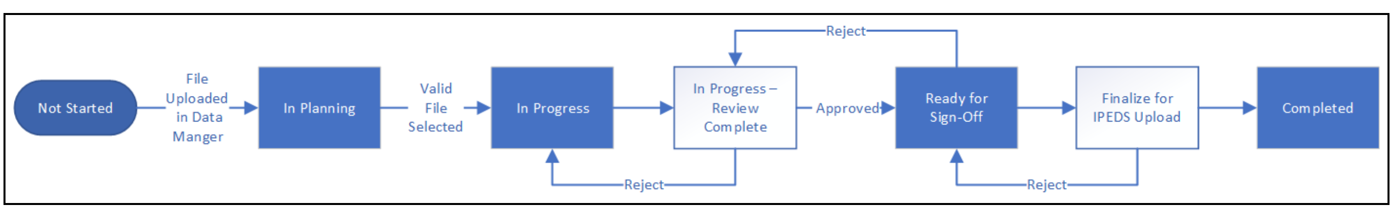


To view surveys for other data collection periods (Fall, Winter, or Spring) or years, select the desired options in the Year and Collection Period drop-downs in the upper right.

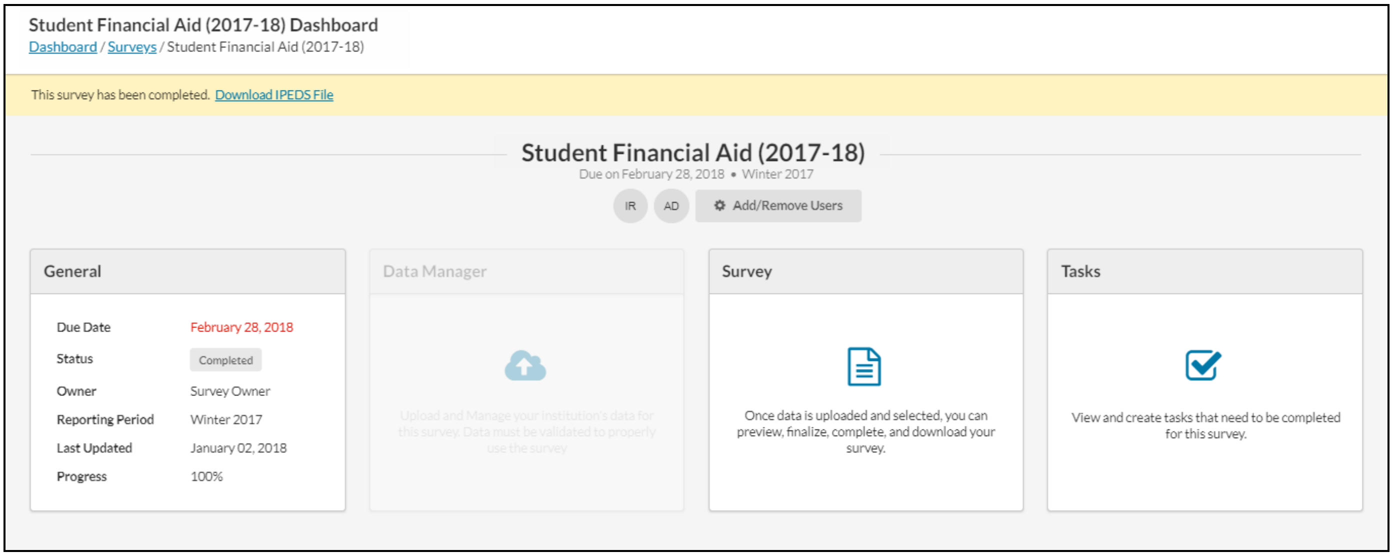
Select any survey to view its survey dashboard, where you can upload data, view the form, create tasks associated with the survey, or view reports based on the imported data.

Survey Statuses and Workflow

The workflow for IPEDS surveys is as follows:



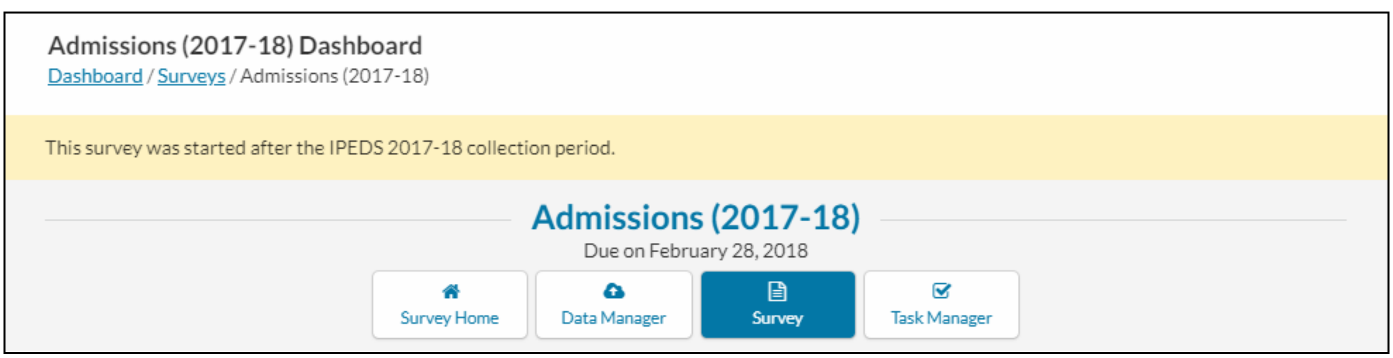
1. All surveys begin in the **Not Started** phase.
2. As soon as a file has been uploaded in the Data Manager, the status changes to **In Planning**.
3. Selecting a file in the Data Manager changes the status to **In Progress**.
4. The status remains In Progress when the survey is marked as Review Complete.
5. When the survey is approved, the status changes to **Ready for Sign-Off**.
6. The status remains as Ready for Sign-Off when the survey is finalized for IPEDS upload.
7. When everything has been finished, the last step is to mark the survey as **Completed**.



Completed surveys have a yellow status bar at the top of the survey dashboard that indicates the completion status and provides a link to download the file to be imported into the IPEDS portal.

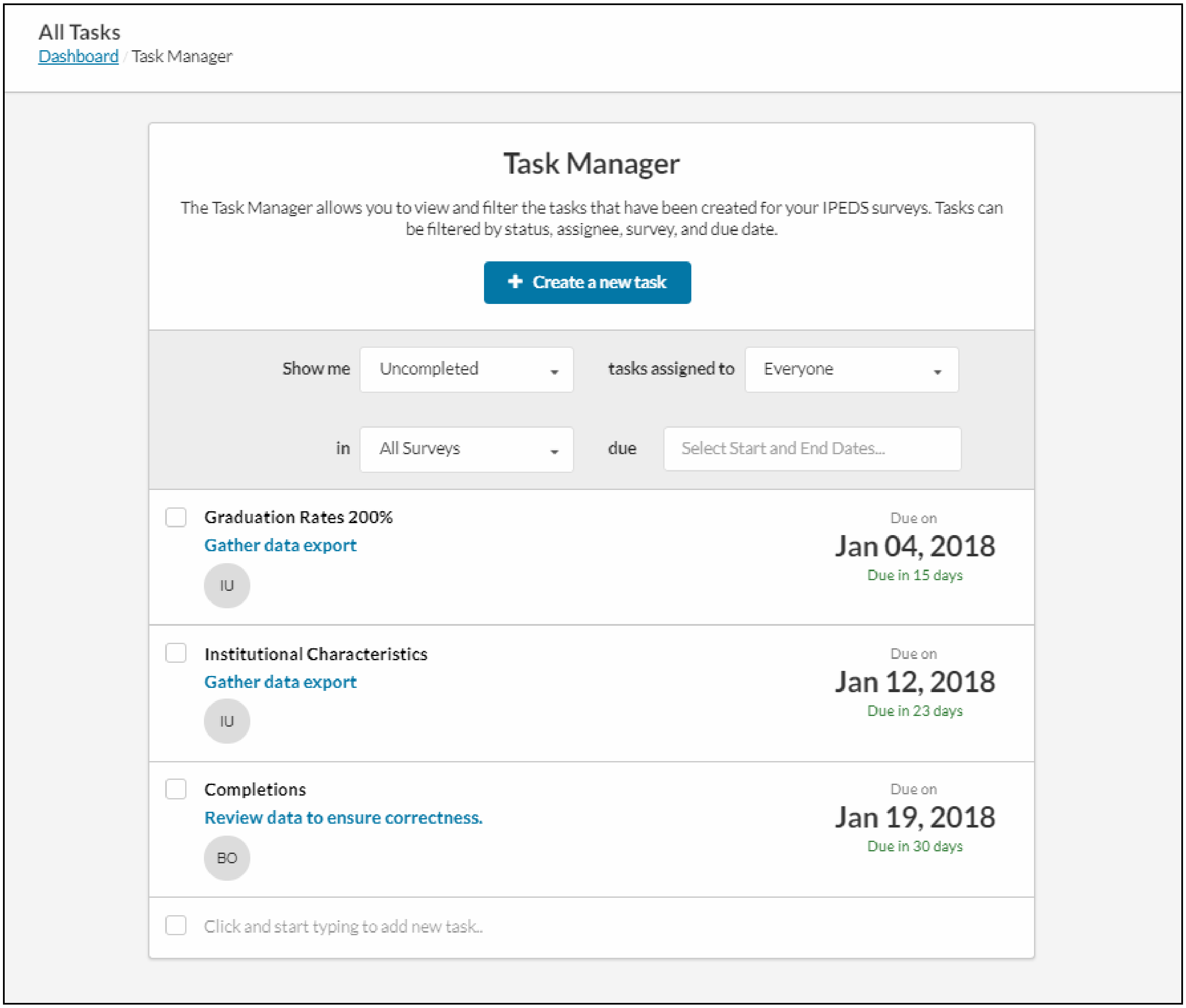
Late or Restarted Surveys

If necessary, surveys can be started or restarted after the end of their designated completion periods (Fall, Winter, or Spring) via the Survey Options section on the survey form. In these situations, a yellow notification bar appears at the top of the survey to communicate this information to users.



Task Manager (System)

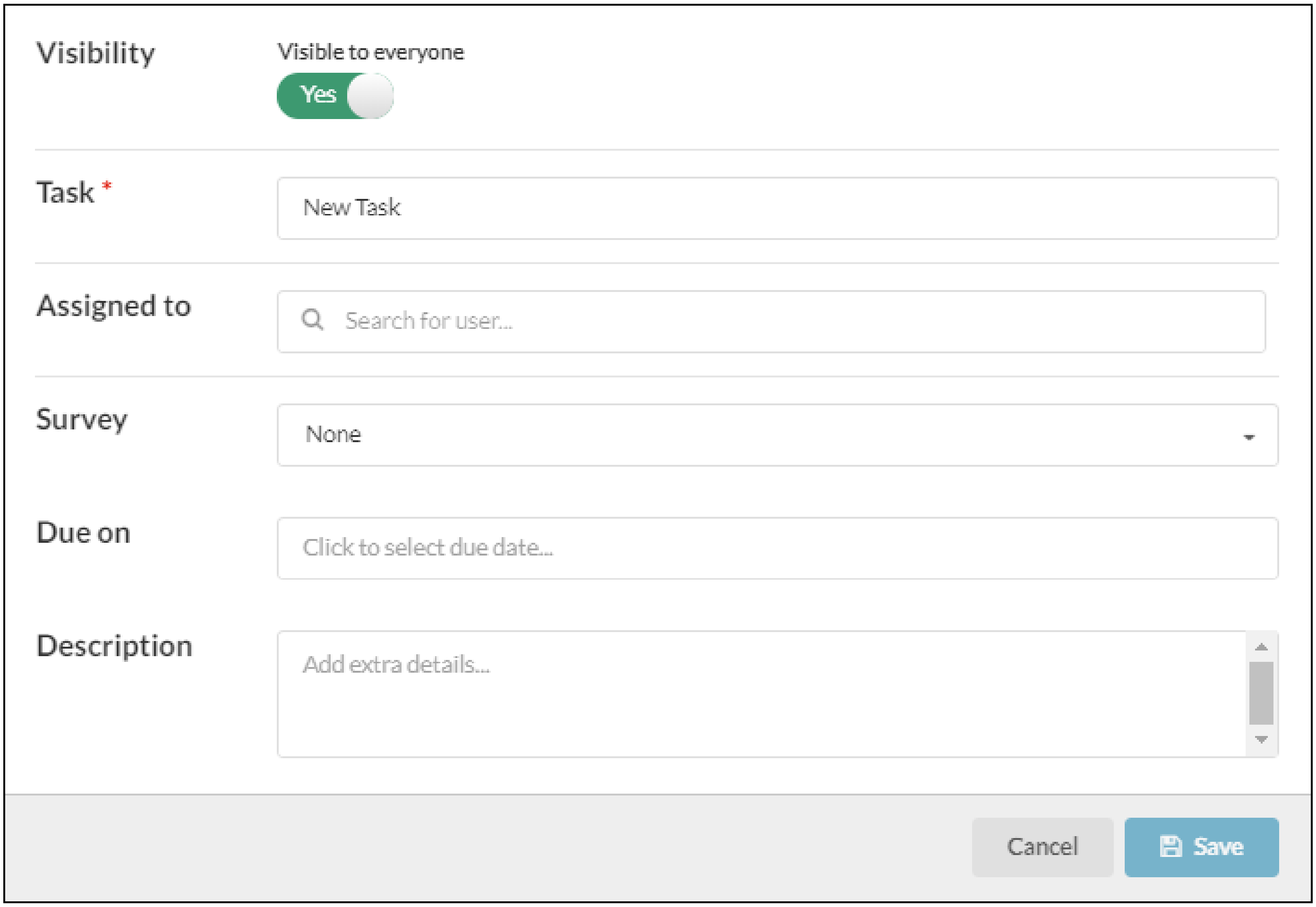
The system-wide Task Manager displays all tasks for your institution, across all surveys. If desired, you can filter the tasks based on status, assignee, survey, or due date. You can also create new tasks from this screen.



To filter the task list, select the desired options. You can filter based on status (uncompleted, completed, or all tasks), user (everyone, or individual users if you have permission to see their tasks), survey, or due date range.

Creating Tasks

To create a new task, select the **Create a new task** button or type the name of the task into the **Start typing to add new task** field at the bottom of the task list. When using the button, the **Edit Task** dialog will appear where you can enter detailed task information. If you create the task by typing the task name, you will need to edit each individual task that you create to specify its details.



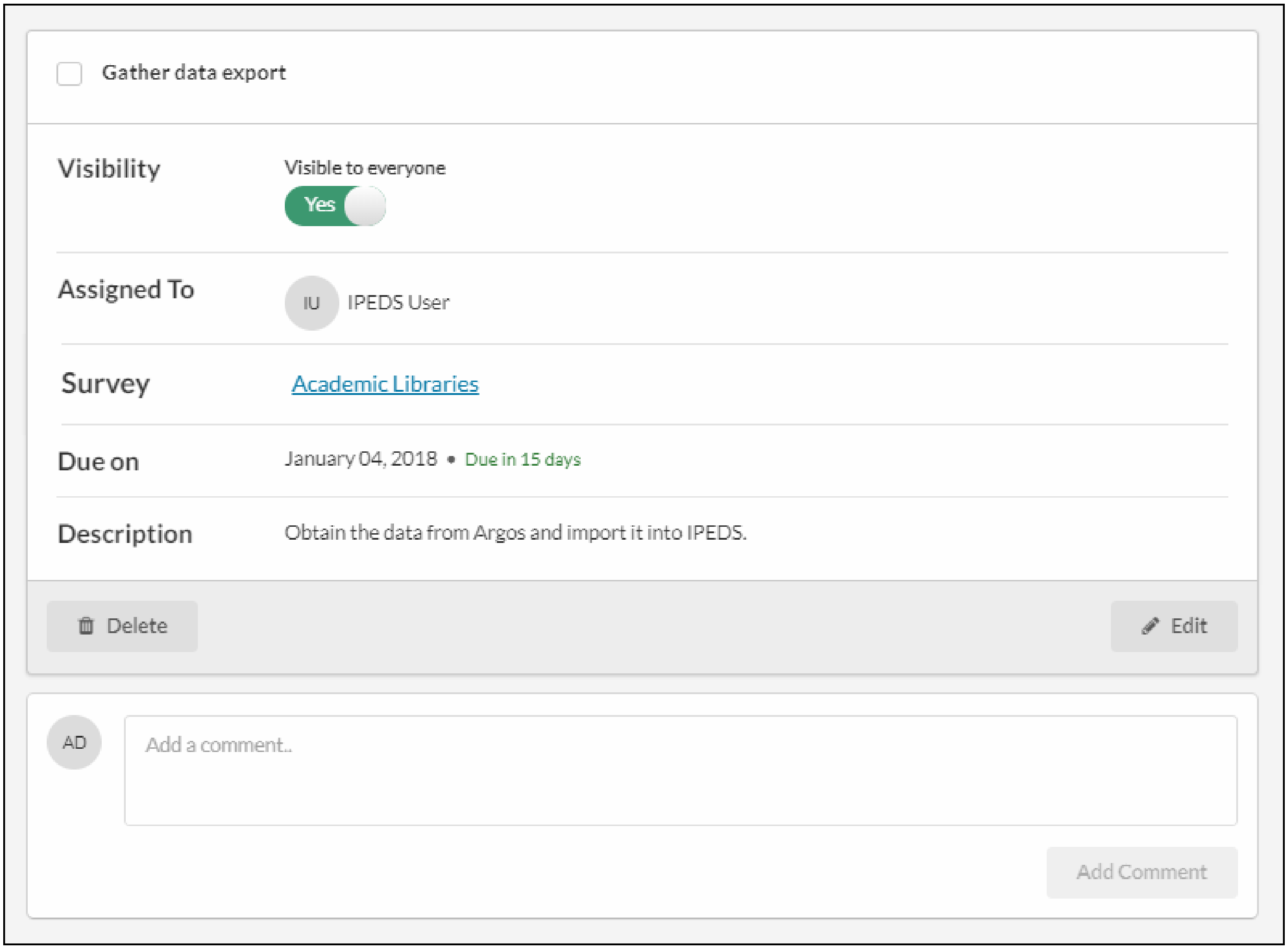
In the Edit Task dialog, you can enter details of the task, including its visibility, details, assigned user(s), due date, and description.

- **Visibility** - If **Visible to everyone** is selected, all IRIS users can see the task. Otherwise, visibility is restricted to only the creator, assigned users, and administrators.
- **Task** - The name of the task to be completed.
- **Assigned to** - This is where you specify which user(s) are assigned to carry out the task. The user(s) you specify here will be emailed a notification when you save the task.
- **Survey** - Select the survey that this task pertains to.
- **Due on** - The due date of the task. Use the calendar pop-up to select a date, or type it in using MM/DD/YYYY format. Calendar Keyboard Shortcuts
- **Description** - A space for you to enter in additional details pertaining to the task.

When you have finished entering in task details, select **Save** to create the task.

Task Details

Selecting a task from the Task Manager opens its details screen where you can see the information relating to that task. The **Edit** button in the lower right corner allows you to change any details as needed.



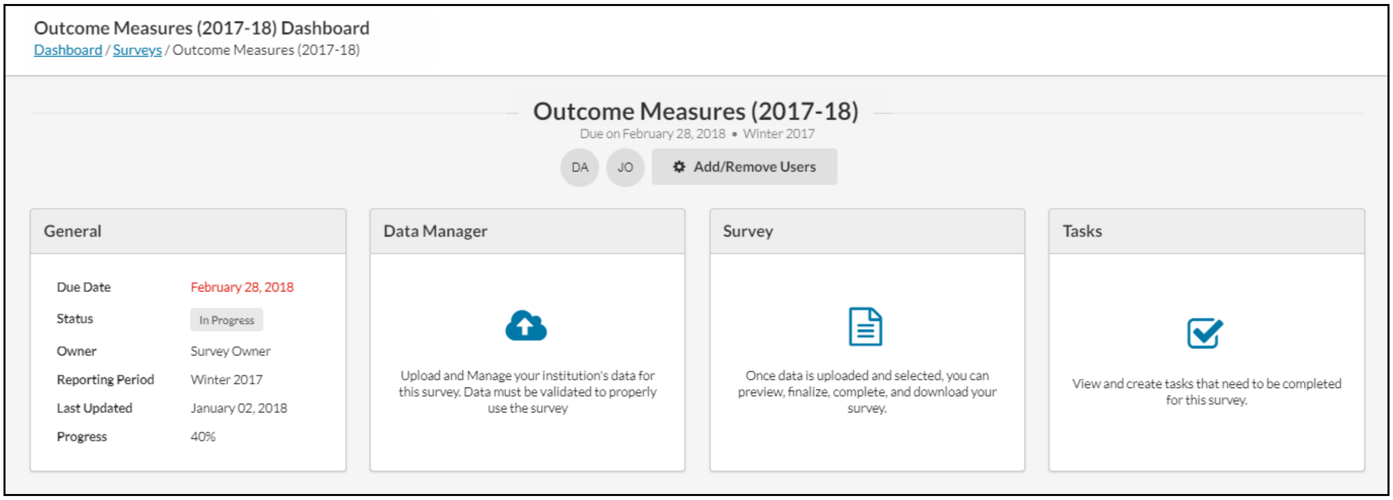
The Task Details screen also allows you to add comments relating to the task. Enter the text of your comment in the comment box under the task, then select **Add Comment**.

Completing Tasks

To mark a task as completed, check the box next to the task in the task list. You can also mark tasks as completed from the Tasks screen within individual surveys. When a task is marked as completed, IRIS sends an email notification to the person who created the task.

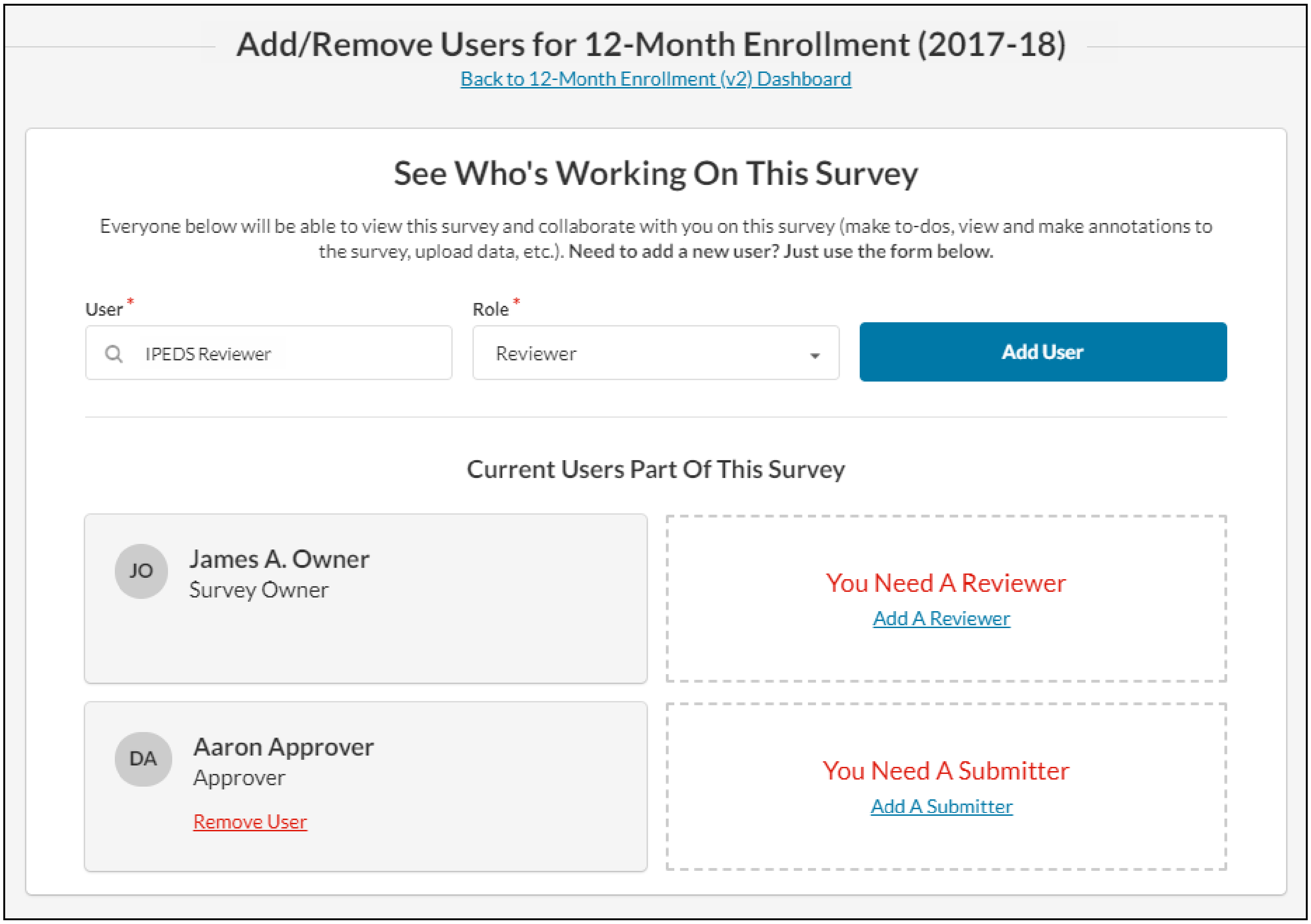
Survey Dashboard

The Survey Dashboard displays information about the survey and allows you to perform various tasks associated with this survey.



Add/Remove Users

The **Add/Remove Users** button allows you to change the user assignments for this survey. Users can be assigned to the survey one of four user roles, including survey owner, reviewer, approver, and submitter.



To assign additional users to this survey as reviewers, approvers, or submitters, start typing the name of the person you want to add in the **User** search field. Select the desired user, then choose the **role** you want to give them from the dropdown. Finally, select the **Add User**button. If desired, you can assign more than one role to the same user by adding the user again and selecting the additional role(s). You can assign as many reviewers, approvers, and submitters as you like, but only one user can be assigned the role of survey owner for each survey.

To assign a user as the survey owner, use the **Add a Survey Owner** link at the bottom of the dialog. This link will open the Survey Selections screen in the Admin section. You will need to be an admin in IRIS in order to access this screen. From here, you can locate the survey and then assign an owner.

To remove a role assignment, select the **Remove User** link underneath the name of the user/role pair.

Once you have saved the user role assignments, you will see the initials of each assigned user listed at the top of the survey dashboard.

General Information

This section contains general information about the survey:

- **Due Date** - The date the survey is due (collection close date for keyholders).
- **Status** - The current status of the survey. Surveys can have the following statuses: *Not Started*, *In Planning*, *In Progress*, or *Ready for Sign-Off*.
- **Owner** - The owner of the survey.
- **Reporting Period** - Fall, Winter, or Spring reporting period.
- **Last Updated** - The date the survey was last updated.
- **Progress** - The percentage of completion of the survey.

Data Manager / Manage Data

The Data Manager is where you go to upload data into the survey.

Survey Form

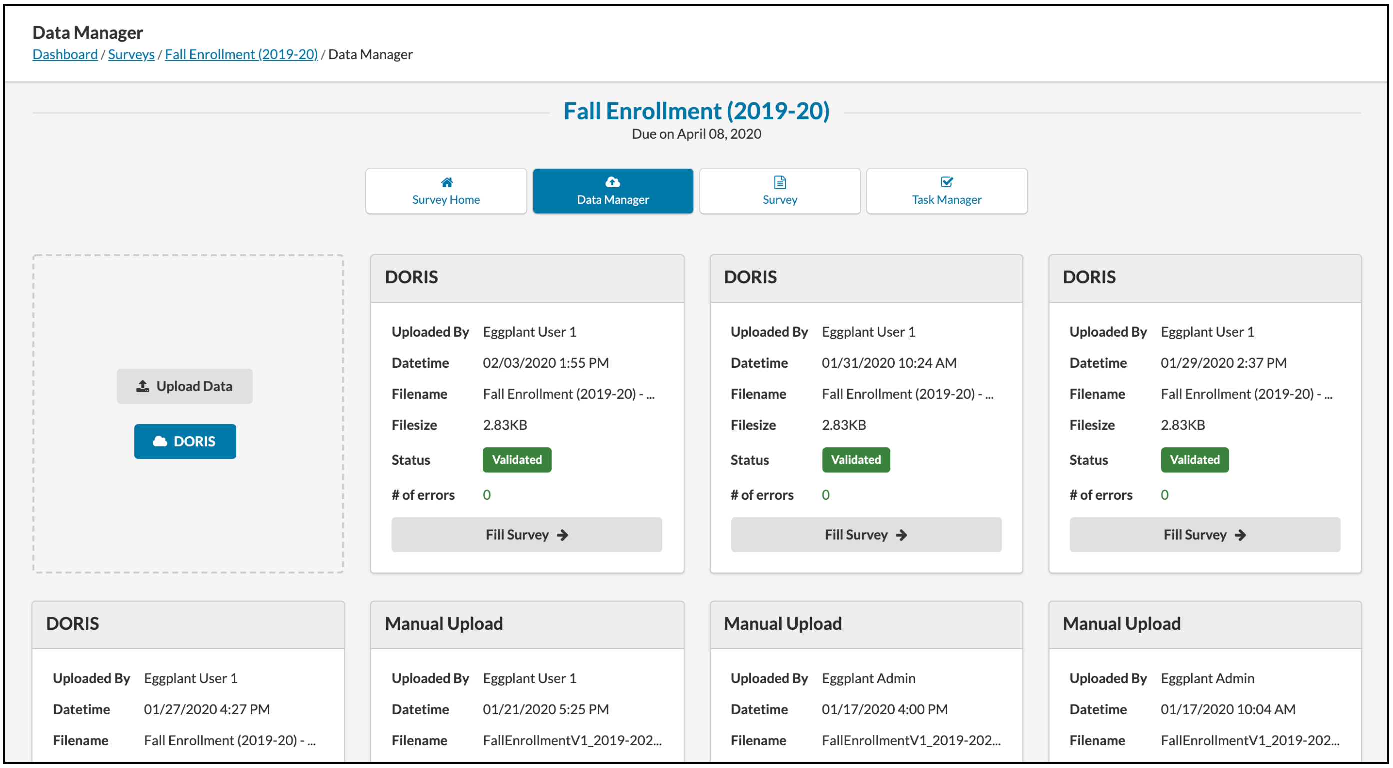
The Survey Form contains the survey information and questions. If you have already uploaded data into the survey, it will be populated into the form for you to review.

Tasks

The Tasks screen gives you a detailed view of the tasks that pertain to this survey. You can filter tasks based on status and assignee, create new tasks, and edit existing ones.

Data Manager

The Data Manager is where you import the data to be used for this survey. You can import the data from either a data file, or from the DORIS application. You can also view and select data files from previous upload attempts.



Importing Files

Uploading a Data File

To import a data file, select the **Upload Data** button. Then, browse for the file that you wish to import.

When the data is imported, the following information is displayed:

- **Uploaded By** - The name of the user who imported the file.
- **Datetime** - The date and time the file was imported.
- **Filename** - The name of the file that was imported.
- **Filesize** - The size of the file that was imported.
- **Status** - Lets you know whether or not the import was successful, and whether this is the file currently being used for the survey.
    - *Selected* - This is the data currently being used for the survey.
    - *Validated* - The data imported with no problems and is available for use.
    - *Invalidated* - There was a problem with the file format that prevents this data from being used.
- **# of Errors** - If there were any problems importing the file, the number of identified issues is shown here.

If the file imported without any errors, select the **Fill Survey** button to fill out the survey form using the uploaded data. When that process completes, you will be able to view the survey results.

Uploading Data from DORIS

To upload data from DORIS, make sure that the data within DORIS was successfully ingested from the data source. Refer to the DORIS online help for additional information. Then select the **DORIS** button. Select the data from DORIS to import.

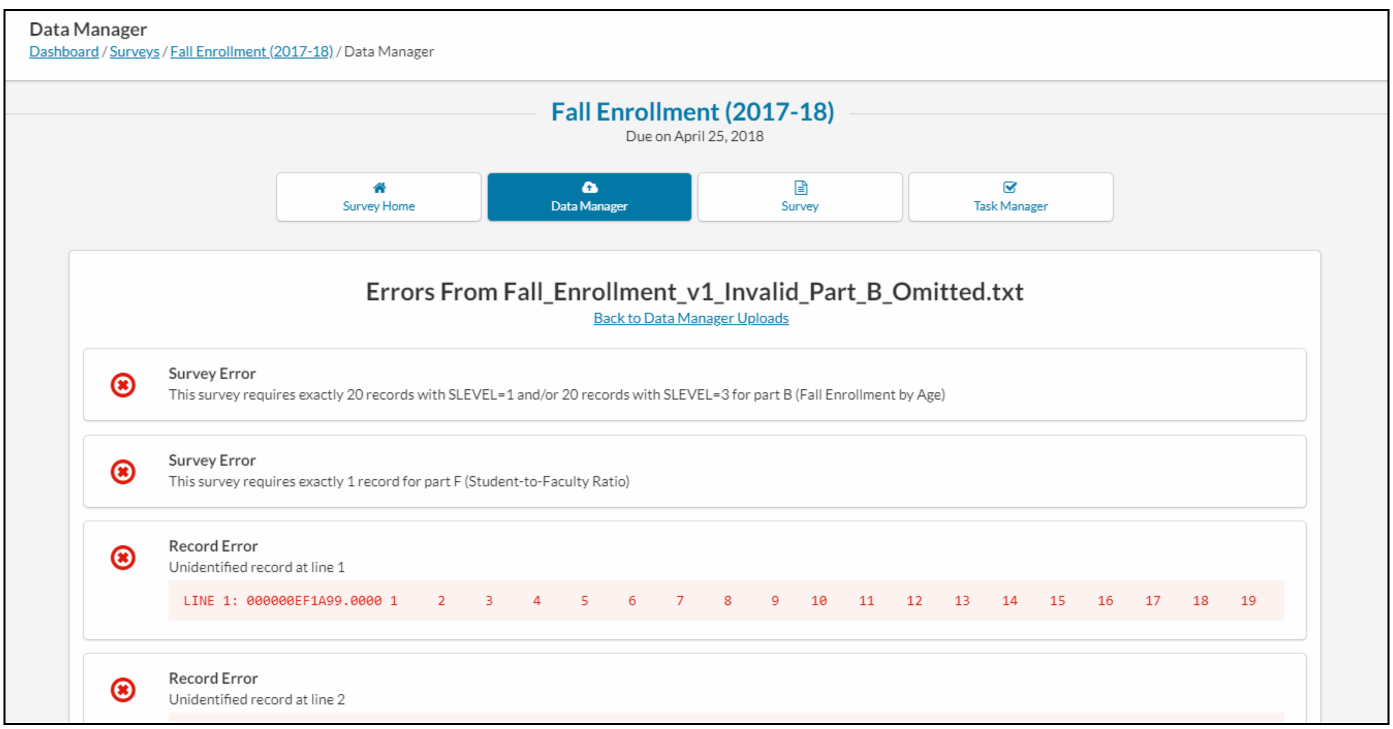
When the data is imported, the following information is displayed:

- **Uploaded By** - The name of the user who imported the file.
- **Datetime** - The date and time the file was imported.
- **Filename** - The name of the file that was imported.
- **Filesize** - The size of the file that was imported.
- **Status** - Lets you know whether or not the import was successful, and whether this is the file currently being used for the survey.
    - *Processing* - The data is currently being imported from DORIS.
    - *Validated* - The data imported with no problems and is available for use.
    - *Selected* - This is the data currently being used for the survey.
    - *Error* - There is a problem with one or more of the entities. Return to DORIS and verify that each entity for the survey is complete and ready.
    - *Invalidated* - There was a problem with the file format that prevents this data from being used.
- **# of Errors** - If there were any problems importing the file, the number of identified issues is shown here.

If the file imported without any errors, select the **Fill Survey** button to fill out the survey form using the uploaded data. When that process completes, you will be able to view the survey results.

Error Messages

If the file did not validate, you can view a list of the error messages by selecting the **Show Errors** button for that file.



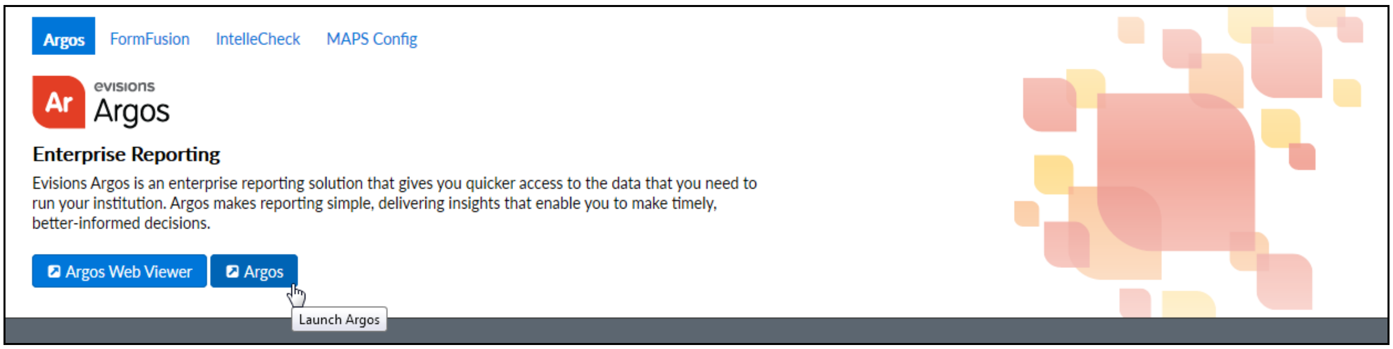
After correcting the errors, you can attempt to upload the data again. Each upload attempt creates a new file record, but only validated files will have a **Fill Survey** button. If you have uploaded multiple valid files, you can switch between them as needed.

Generating the Data File

For each IPEDS survey that you must complete, you will need a data file containing the information to be imported into IRIS. Evisions provides twelve Argos DataBlocks containing reports that correspond to the twelve IPEDS survey components. These DataBlocks have been customized for your institution to pull in all of the data needed to complete your IPEDS surveys. You will need to save the output of these reports and then import them using the Data Manager for each survey.

Launching Argos

The first step is to launch Argos. If you have not used Argos before, please refer to the eLauncher and MAPS Application Login Instructions for details.

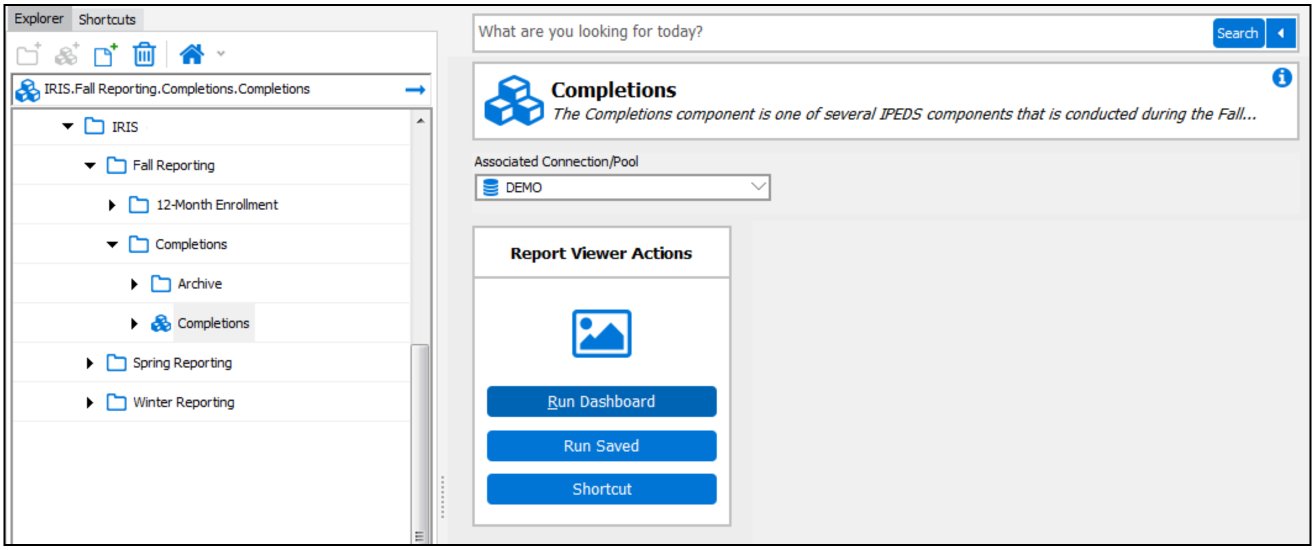


You can run the report using either the Argos Windows client or the Argos Web Viewer depending on how your institution has chosen to configure Argos.

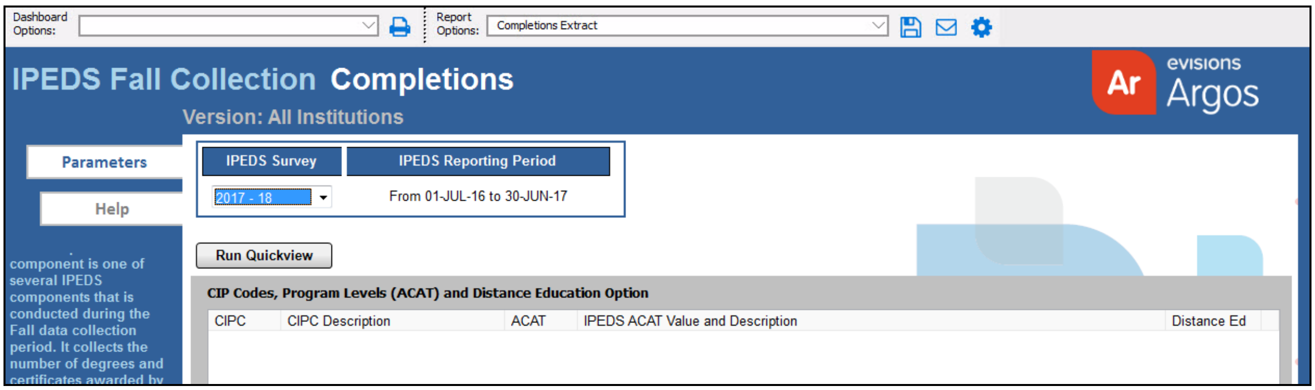
If you are unable to log in, please contact your institution's MAPS administrator for assistance.

Running the Report

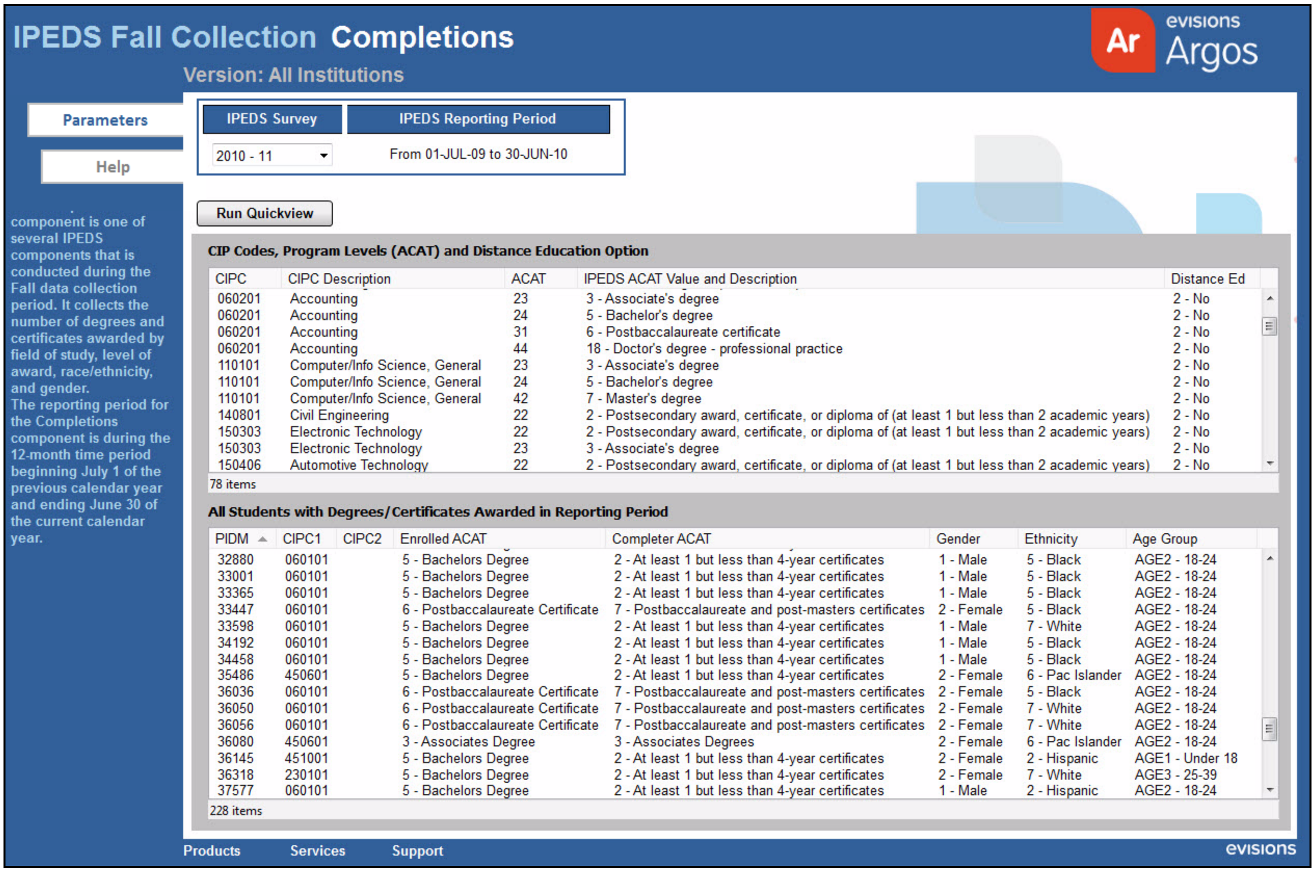
1. In Argos, navigate to the folder where your IPEDS DataBlocks are located. Select the DataBlock for the survey that you are working on, then click **Run Dashboard** (or just select the DataBlock, if you are using the Web Viewer).



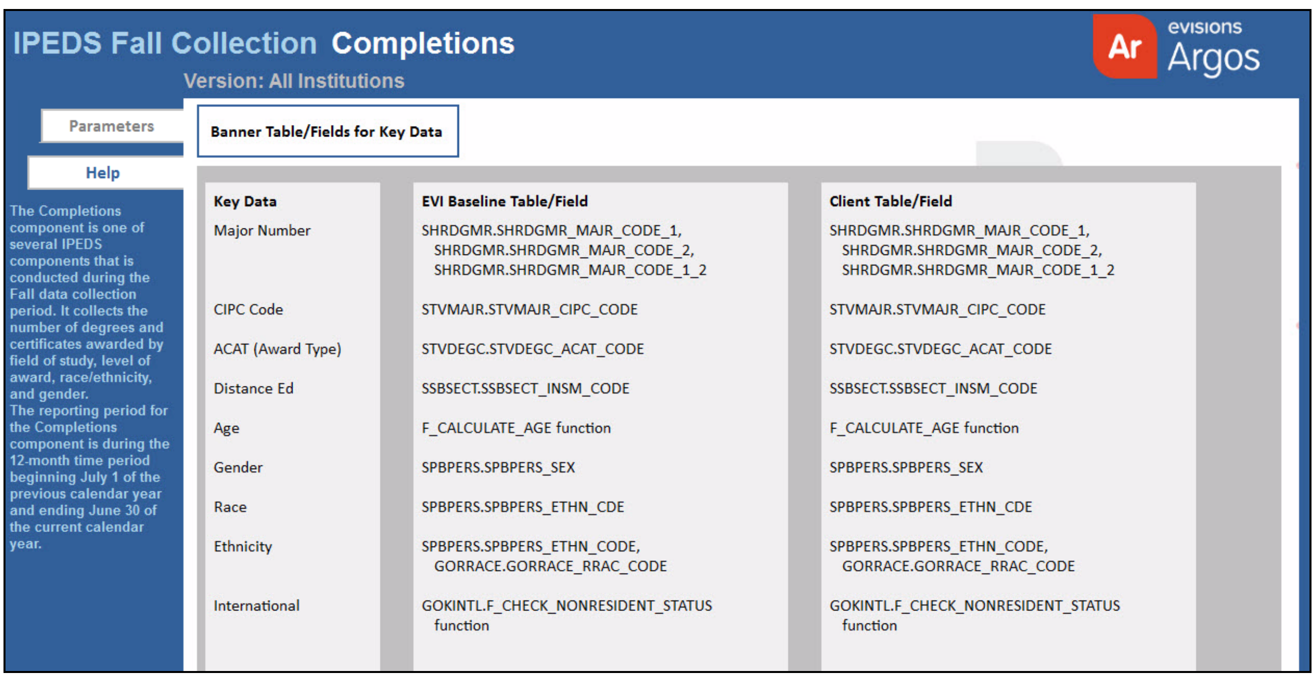
2. Follow the instructions on the dashboard to select any required parameters. The parameters will differ depending on which DataBlock you are running.



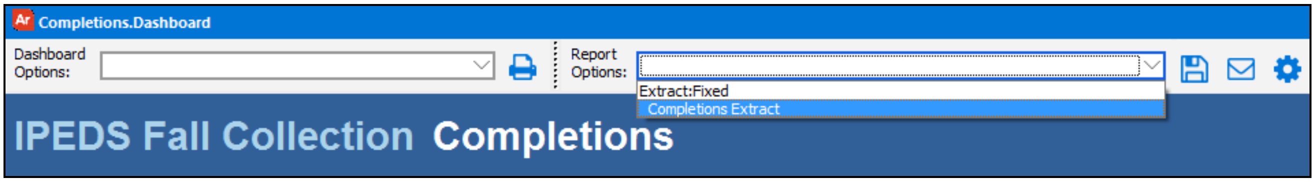
3. After selecting the desired parameters (in this example, the survey year), you can use the **Run Quickview** button to see a preview of the raw data that will be used to create the IRIS import file.



The preview contains some additional information that can help locate records in the database if data cleansing is required. To see where information is being pulled from, refer to the **Help** tab for a list of the referenced Banner tables and fields.



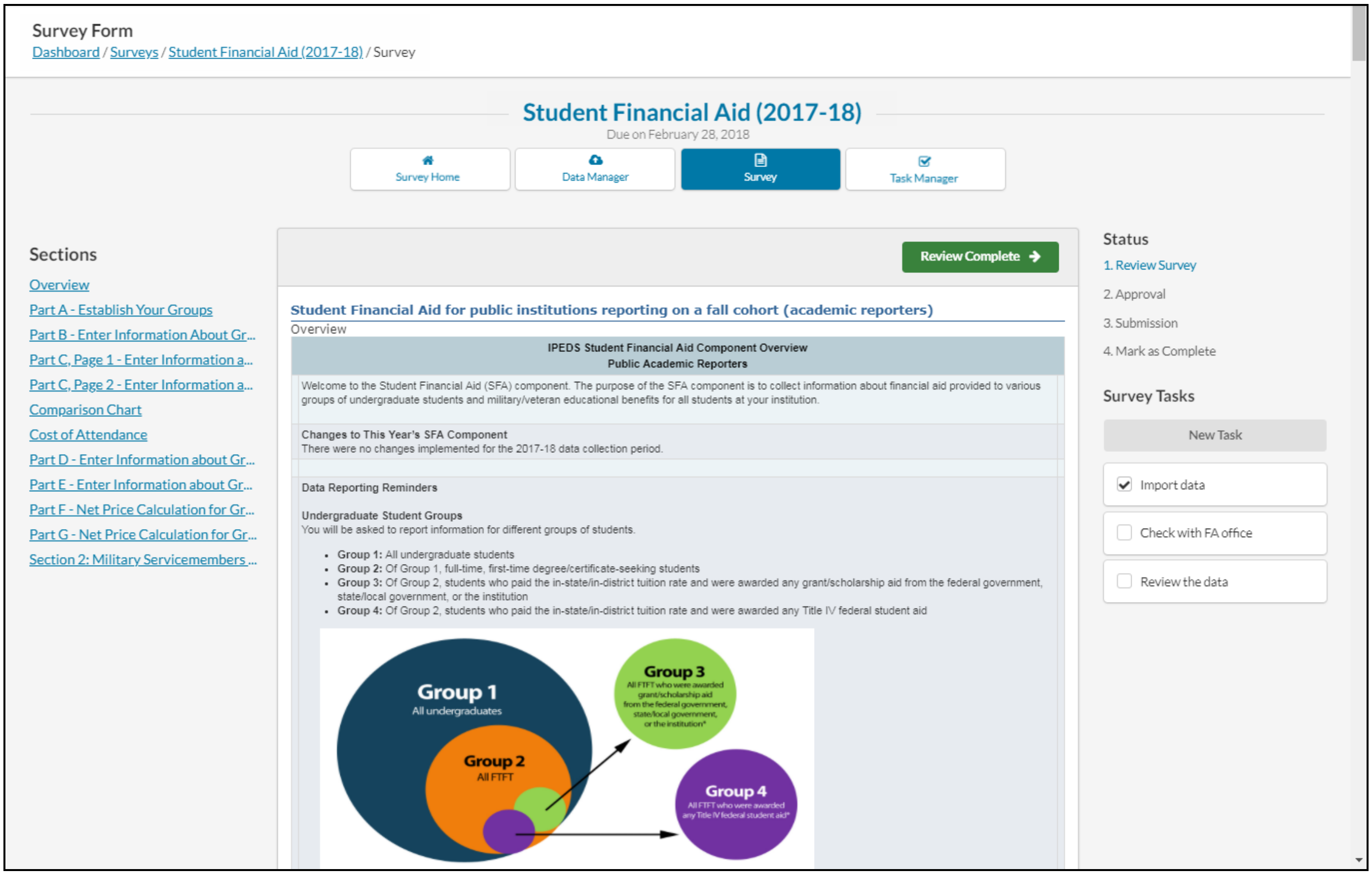
4. At the top of the DataBlock, select the report to be generated.



5. Save the output file:
   - If you are using the Argos client, click the **Save** button to generate the report output. Save the file in a location where you will be able to access it to import into IRIS.
   - If you are using the Web Viewer, use the **Run** button at the top of the screen to generate the report output. Depending on your browser, the file may be automatically downloaded to your default downloads directory. If you are not seeing any output, you may need to allow pop-ups in order for the file to download.

Survey Form

The Survey screen displays the actual text and questions of the survey. The form is an exact reproduction of the IPEDS survey form produced by NCES[1], and is updated by Evisions whenever NCES makes changes.



- The **Sections** list allows you to quickly jump to the section of the survey that you want to view.
- The **Status** section on the right side of the screen shows the current status of the survey in its progress through the workflow. (Desktop view only.)
- Underneath, the **Survey Tasks** section lists all of the tasks associated with this survey. (Desktop view only.) You can mark a task as complete by checking the box next to its name, and create new tasks using the **New Task** button.

If you have already uploaded data using the Data Manager, it will be automatically filled in to the form for you.

[1]National Center for Education Statistics

Information from Part A:			YOUR PRIOR YEAR DATA 2015-2016	YOUR PRIOR YEAR DATA 2016-2017	2017-2018
Group 3 Full-time, first-time degree/certificate-seeking undergraduate students paying the in-state or in-district tuition rate who were awarded grant or scholarship aid from the following sources: the federal government, state/local government, or the institution (This number is carried forward from Part A, Line 03)			304	204	104
01	**Report the number of Group 3 students with the following living arrangements:**		YOUR PRIOR YEAR DATA 2015-16	YOUR PRIOR YEAR DATA 2016-17	2017-18
	01a	On-campus	604	504	404
	01b	Off-campus (with family)	904	804	704
	01c	Off-campus (not with family)	1,204	1,104	1,004
	01d	Unknown (calculated) This value is calculated using the following formula: [A03-(D01a+D01b+D01c)]	-2,408	-2,208	-2,008
02	**Report the total amount of grant or scholarship aid from the federal government, state/local government, or the institution awarded to Group 3 students**		1,504	1,404	1,304
03	Average grant or scholarship aid from the federal government, state/local government, or the institution awarded to Group 3 students (calculated value). This value is calculated using the following formula: [D02/A03]		5	7	13
The notes below provide context for the data you've reported above and may be posted on the College Navigator website. Choose one option that best explains your data or choose "Non-applicable" if you do not wish to provide context notes. If none of the options provided explains your institution's data, then choose "Other" and write your own context notes. Notes should be written to be understood by students and parents. For example, institutions may report here other sources of private aid not included in the categories listed.					

The filled-in data is displayed in the form's edit fields (white or yellow cells). The numbers displayed with a light blue background have been calculated for you based on the imported data.

Data Validation

IRIS keeps track of your historical IPEDS data and uses it to help you validate data for the current year's survey.

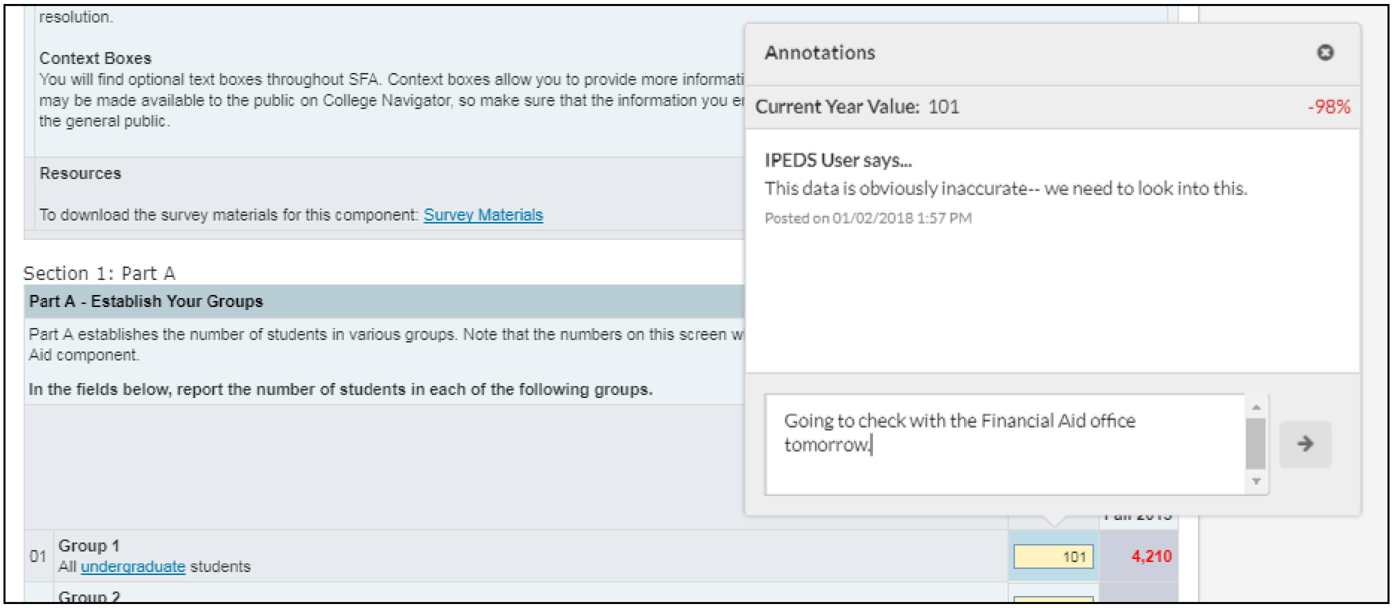
Some forms display prior year data directly on the form. When present, prior year data will be displayed using red text.

In the fields below, report the number of students in each of the following groups.			
		Fall 2017	YOUR PRIOR YEAR DATA Fall 2016
01	**Group 1** All undergraduate students	101	4,505
02	**Group 2** Of those in Group 1, those who are full-time, first-time degree/certificate-seeking	102	1,473
02a	Of those in Group 2, those who were awarded any Federal Work Study, loans to students, or grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution	602	1,298
02b	Of those in Group 2, those who were awarded any loans to students or grant or scholarship aid from the federal government, state/local government, or the institution	702	1,298

Cells containing data that has a 20% or greater variation from the previous year's submitted data are highlighted in yellow and have a thick blue border. This may indicate a problem with your data if the variance is not expected. To see the exact difference from the previous year's data, select the cell to bring up its **Annotations** window. The current year value is shown at the top, with the previous year's value displayed in red to the right.

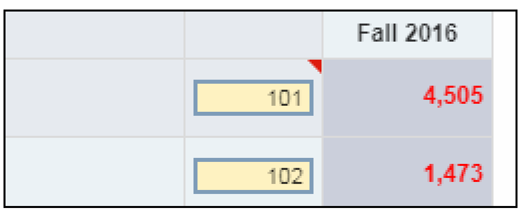
Annotations

Selecting any cell brings up its Annotations window:



The Annotations window allows you to comment on individual data cells, and to see a record of previous conversations about the data. To enter a new annotation, type your comment into the text box at the bottom of the window, then select the arrow button to add it. The comment will be added to the window, along with your username and a timestamp.

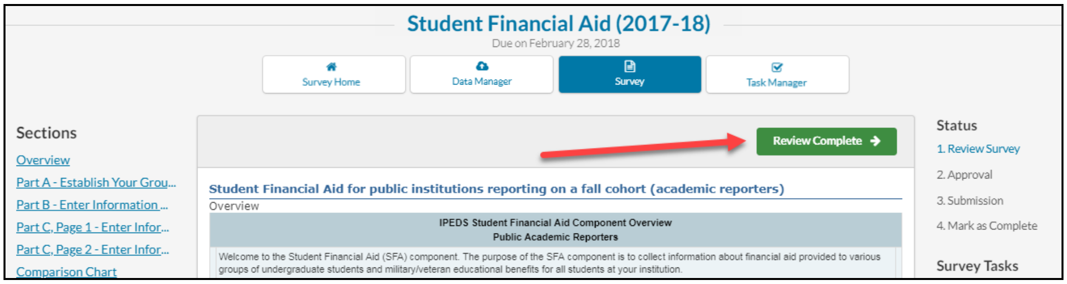
When viewing the form, any cells that have annotations associated with them display a red triangle in the upper right corner of the cell. This lets you know that there has been some conversation regarding this data point, which you may wish to review.



The annotations will remain associated with the survey form in the IRIS application throughout the survey workflow, but are not submitted to NCES since they are not part of the actual survey. Annotations may be reviewed at any time in the future as needed.

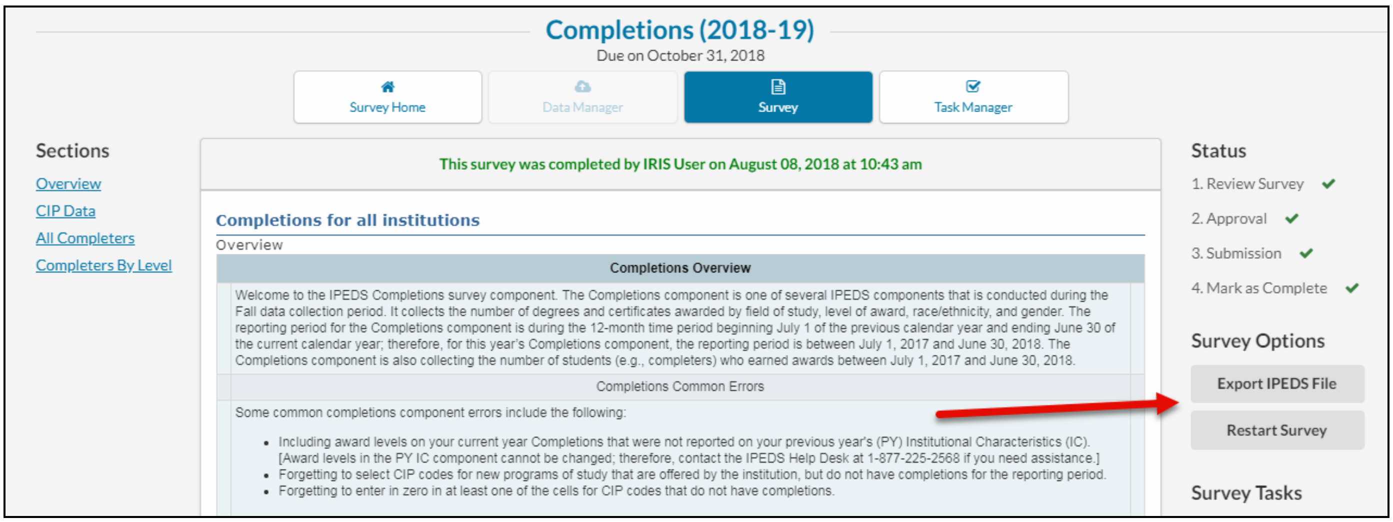
Reviewing the Survey

Once the everything on the form has been validated, the person who is designated as the survey's Reviewer can select the green **Review Complete** button in the upper right of the survey to proceed to the next step of the workflow.



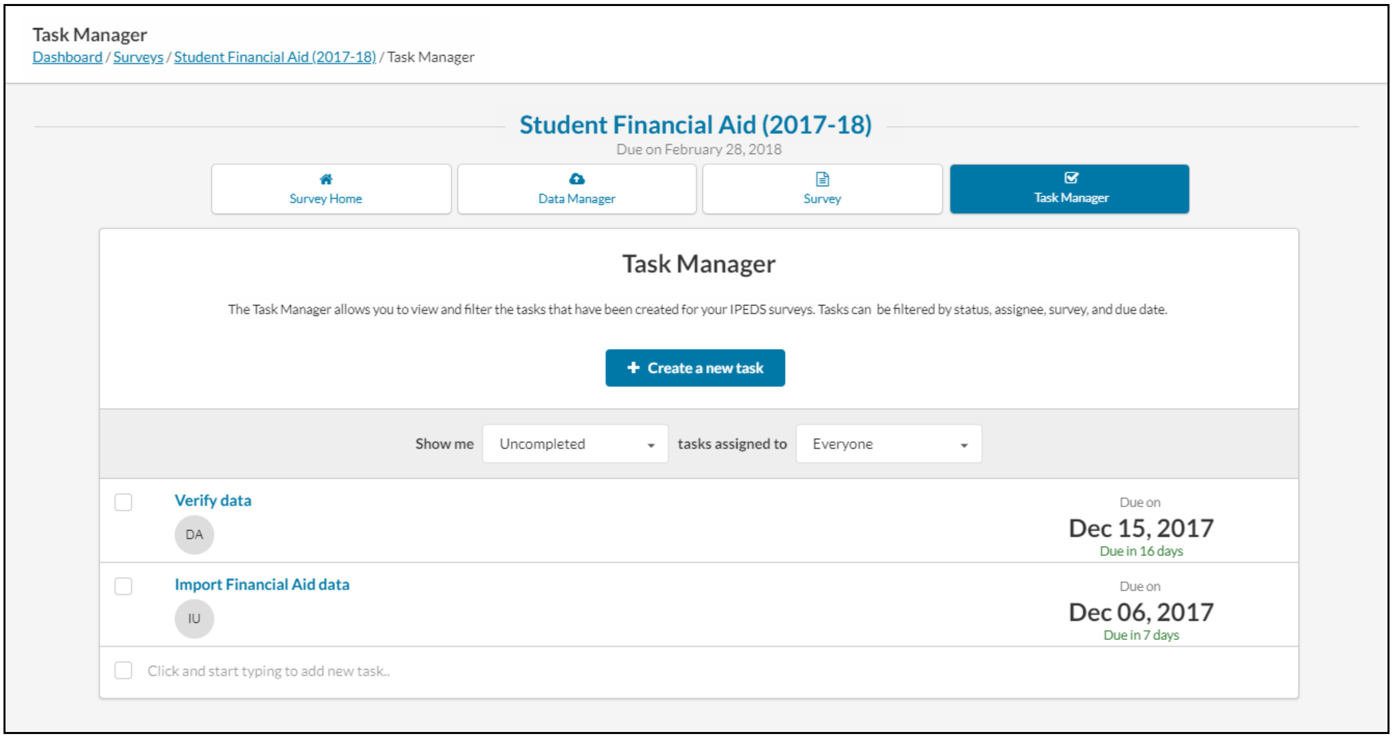
Survey Options

When the survey is complete, the **Survey Options** section appears on the survey form. From here, you can choose to export the IPEDS file, or to restart the survey for this year if needed.



Task Manager (Survey)

The **Task Manager** section within each survey shows a list of all tasks pertaining to that survey. You can filter the list based on task status or assigned user. You can also create new tasks and assign them to yourself or to other IRIS users.



To filter tasks, change the **Show me** drop-down to All, Uncompleted, or Completed tasks. You can also change the **Tasks assigned to** drop-down so that you will see tasks assigned to everyone, or just your own tasks.

To mark a task as completed, check the box next to the task in the task list. Marking a task as completed sends an email notification to the person who created the task informing them of the change in status.

Creating Tasks

Select the **Create a new task** button to add a task.

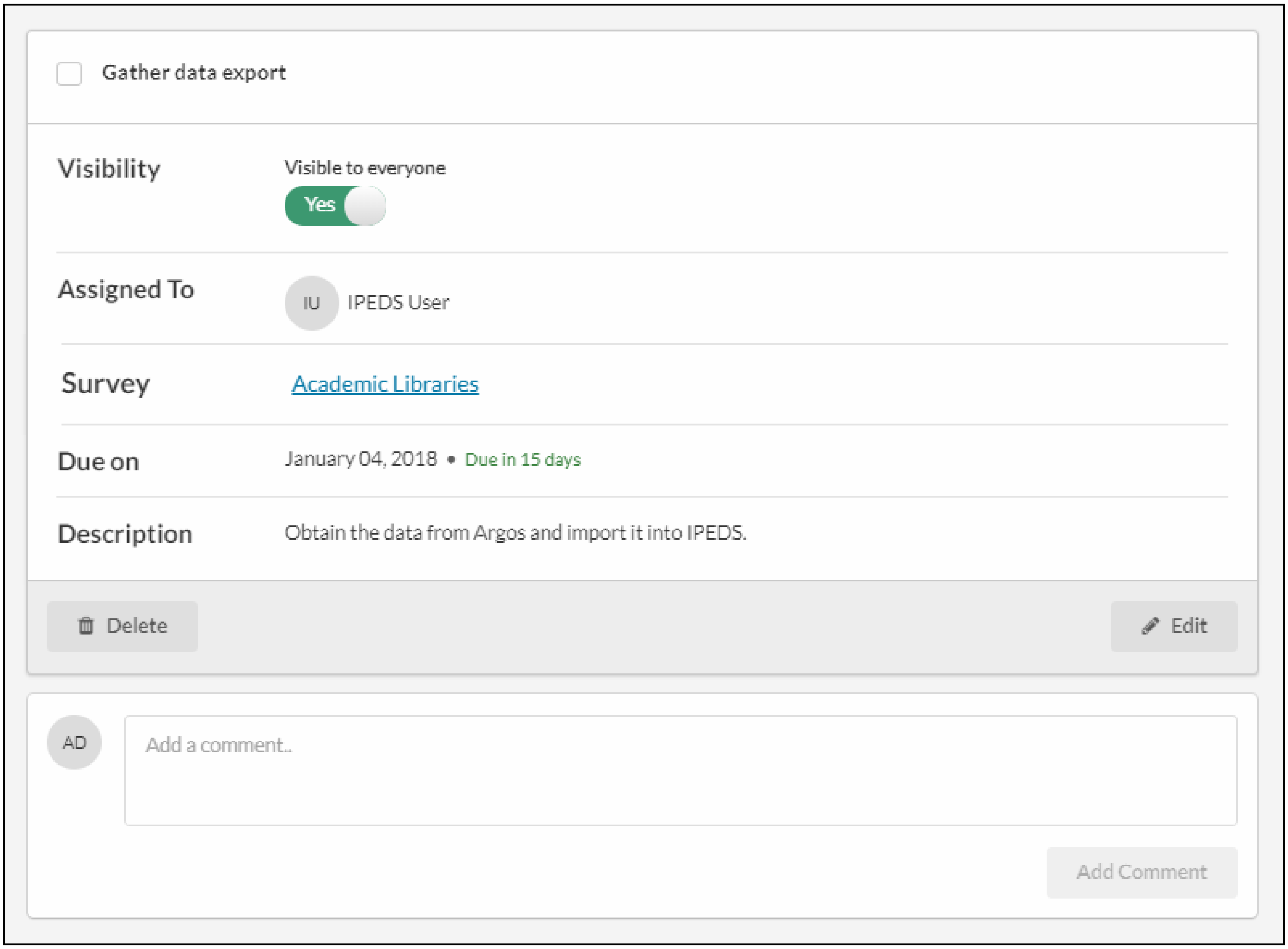
Here, you can enter details of the task, including its visibility, details, assigned user(s), due date, and description.

- **Visibility** - If **Visible to everyone** is selected, all IRIS users can see the task. Otherwise, visibility is restricted to only the creator, assigned users, and administrators.
- **Task** - The name of the task to be completed.
- **Assigned to** - This is where you specify which user(s) are assigned to carry out the task. The user(s) you specify here will be emailed a notification when you save the task.
- **Due on** - The due date of the task. Use the date picker to select a date, or type it in using MM/DD/YYYY format.
- **Description** - A space for you to enter in additional details pertaining to the task.

When you have finished entering in task details, select **Save** to create the task.

Task Details

Selecting a task from the Tasks list opens its details screen where you can see the information relating to that task. The **Edit** button in the lower right corner allows you to change any details as needed.



The Task Details screen also allows you to add comments relating to the task. Enter the text of your comment in the comment box under the task, then select **Add Comment**.

Completing Tasks

To mark a task as completed, check the box next to the task in the task list. Marking a task as completed sends an email notification to the person who created the task informing them of the change in status.

System Task Manager

Tasks can also be viewed in the system-wide Task Manager, which shows all tasks that are visible to you across all surveys.

User Roles

IRIS supports four user roles for IPEDS:

Survey Owner

The survey owner is the person who is responsible for overseeing the completion of the survey. The survey owner will be notified via email of any change in survey status.

Reviewer

Reviewers are responsible for verifying that the imported data is correct and then sending the survey to an approver.

Approver

Approvers look over the survey and ensure everything is correct before marking it as approved.

Submitter

The submitter is the person who submits the survey to IPEDS.

See also:

- Survey Workflow

Support Resources

Evisions provides several sources of support for IRIS users, including online help and user guides, release notes, and a support website where you can browse the Knowledge Base, participate in customer forums, or open a case with support.

Online Help

The IRIS Help serves as a reference guide for all of the features in the software. You can access the help by selecting **Help** in the menu.

Release Documentation

The Release Notes page contains information regarding the changes in all current and previous versions of IRIS.

User Guides and Additional Documentation

The online help for IRIS contains an end user guide and an administrator guide. The guides contain step-by-step instructions for the tasks performed by each role, providing an excellent mechanism for getting started with IRIS.

Additional Resources

The Evisions Support Center contains links to additional support resources:

- HelpDesk - Technical support website where you can open a support case, or search the Knowledge Base.
- Knowledge Base - Answers to common questions.
- Forums - Collaborate with other IRIS users.

Glossary

A

Approver

Approvers look over the survey and ensure everything is correct before marking it as approved.

C

CSV

CSV stands for "Comma Separated Value". A CSV file is a text file that contains values separated by commas. The file can be opened in text editors or in spreadsheet programs such as Microsoft Excel or Google Sheets.

D

Dashboard

The first screen you see in IRIS is your personalized dashboard, which gives you an overview of the surveys that you are assigned to. Each survey also has a survey dashboard that provides information and links to the various activities associated with the survey.

I

Institutional Research

Work done at schools, colleges, and universities to inform campus decision-making and planning. Institutional researchers are typically also responsible for completion of the required IPEDS surveys for the institution.

IPEDS

IPEDS stands for Integrated Postsecondary Education Data System. It is a system of 12 interrelated surveys conducted annually by the National Center for Education Statistics within the United States Department of Education. Components of the 12 surveys are collected over the Fall, Winter, and Spring reporting periods each year. The completion of all IPEDS surveys is mandatory for all institutions that participate in any federal assistance program authorized by Title IV of the Higher Education Act. IRIS provides a way for you to electronically collect, submit, and report against IPEDS data.

IRIS

IRIS stands for Institutional Research Information Solution and is the Evisions product that allows you to electronically track, submit, and report against IPEDS data.

N

NCES

National Center for Education Statistics

R

Reviewer

Reviewers are responsible for verifying that the imported data is correct and then sending the survey to an approver.

S

Submitter

The submitter is the person who submits the survey to IPEDS.

Survey Owner

The survey owner is the person who is responsible for overseeing the completion of the survey. The survey owner will be notified via email of any change in survey status.