evisions
IRIS

Institutional Research Information Solution

IRIS Administrator Guide

Trademark, Publishing Statement, and Copyright Notice

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Getting Started

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.

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[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.

Logging In

This is the login screen for IRIS.
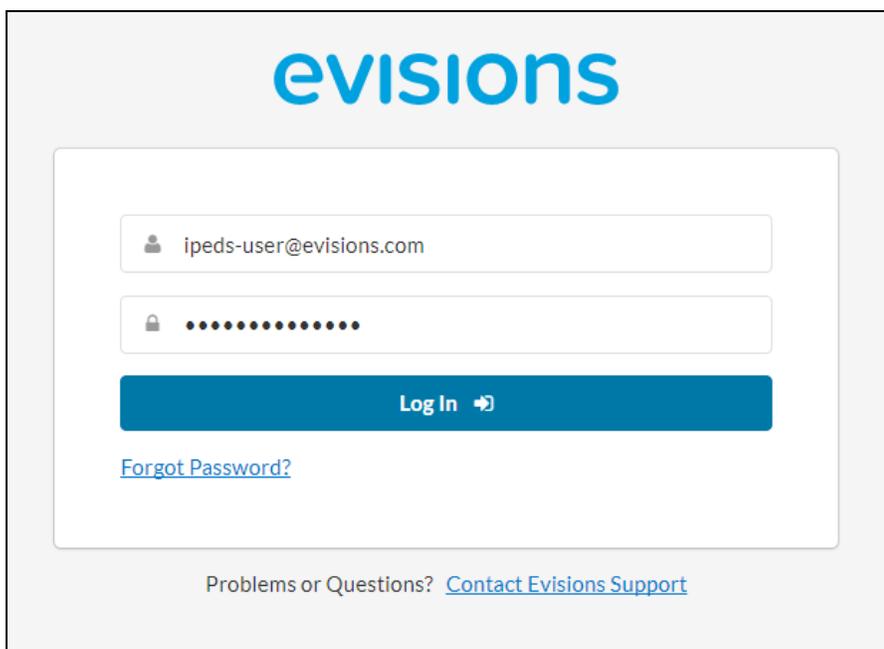
Enter your email address and password at the prompt. Then, select **Log In** to launch IRIS.

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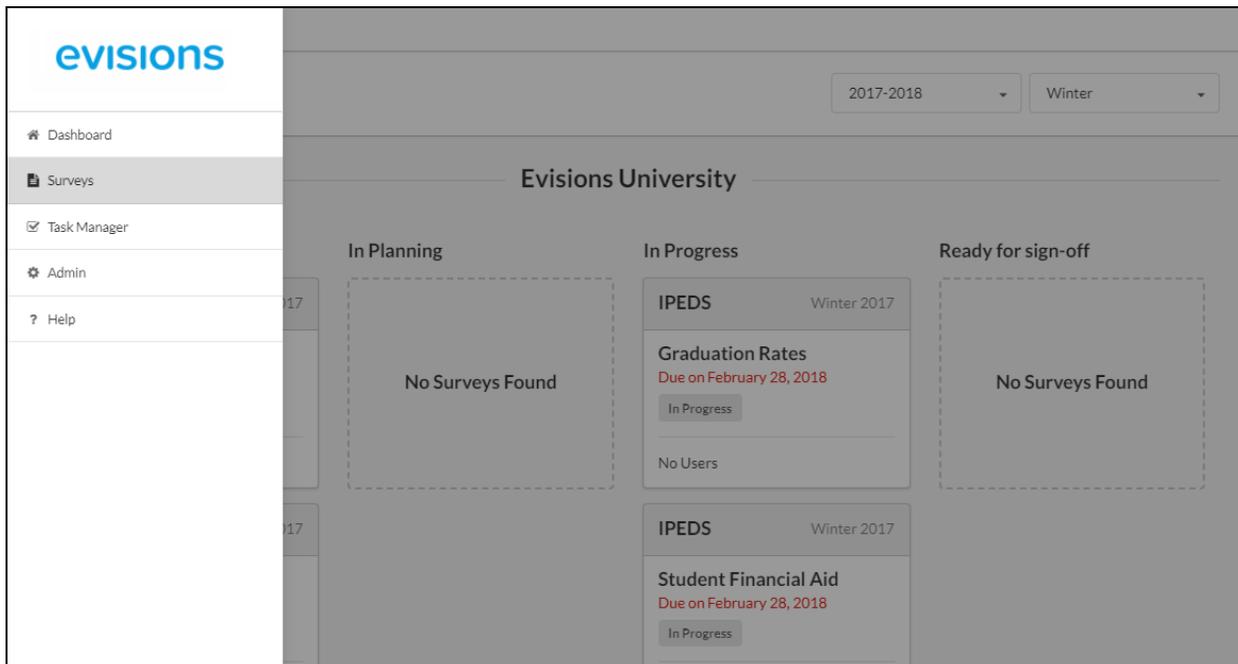
- ■ **Users** see all surveys that they are involved with as a survey owner, reviewer, approver, or submitter.
- ■ **Admins** can see all surveys in the system.

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.
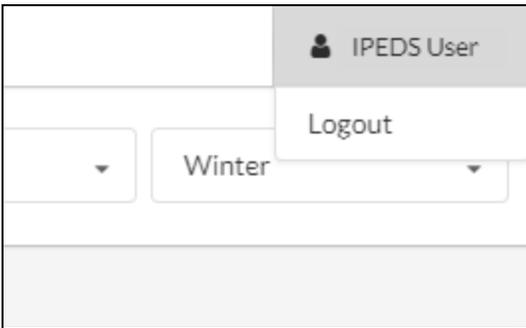
Help

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.
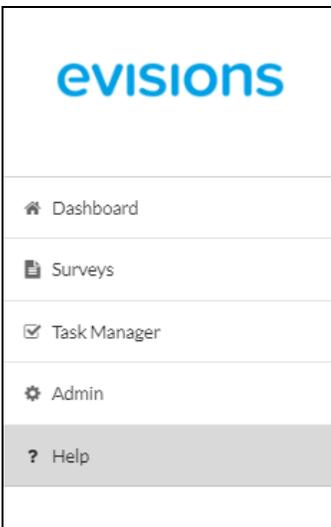
Dashboard

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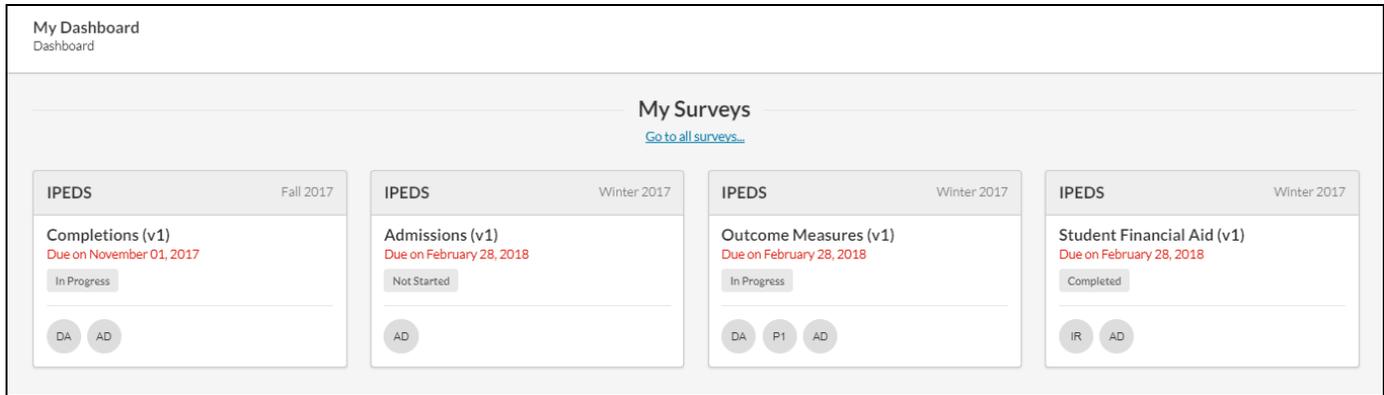
The surveys are listed in order by data collection period (Fall, Winter, or Spring). Select any survey to view its survey dashboard, where you can upload data, view the form, create tasks associated with the survey, or view reports based on the imported data.

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:
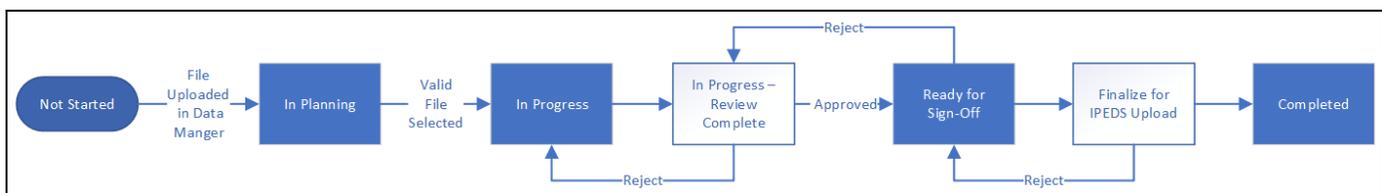
1. All surveys begin in the **Not Started** phase.
2. As soon as a file has been uploaded in the Data Manager, the status changes to **In Planning**.

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.

All Tasks
Dashboard / Task Manager

Task Manager

The Task Manager allows you to view and filter the tasks that have been created for your IPEDS surveys. Tasks can be filtered by status, assignee, survey, and due date.

+ Create a new task

| Show me | Uncompleted ▾ | tasks assigned to | Everyone ▾ |
| in | All Surveys ▾ | due | Select Start and End Dates... |

☐ **Graduation Rates 200%**
Gather data export
IU

Due on
Jan 04, 2018
Due in 15 days

☐ **Institutional Characteristics**
Gather data export
IU

Due on
Jan 12, 2018
Due in 23 days

☐ **Completions**
Review data to ensure correctness.
BO

Due on
Jan 19, 2018
Due in 30 days

☐ Click and start typing to add new task..

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.

Administration

IRIS administrators see an Admin option at the bottom of the main menu. The **Admin Dashboard** allows administrators to configure users and choose which surveys are active for the institution.
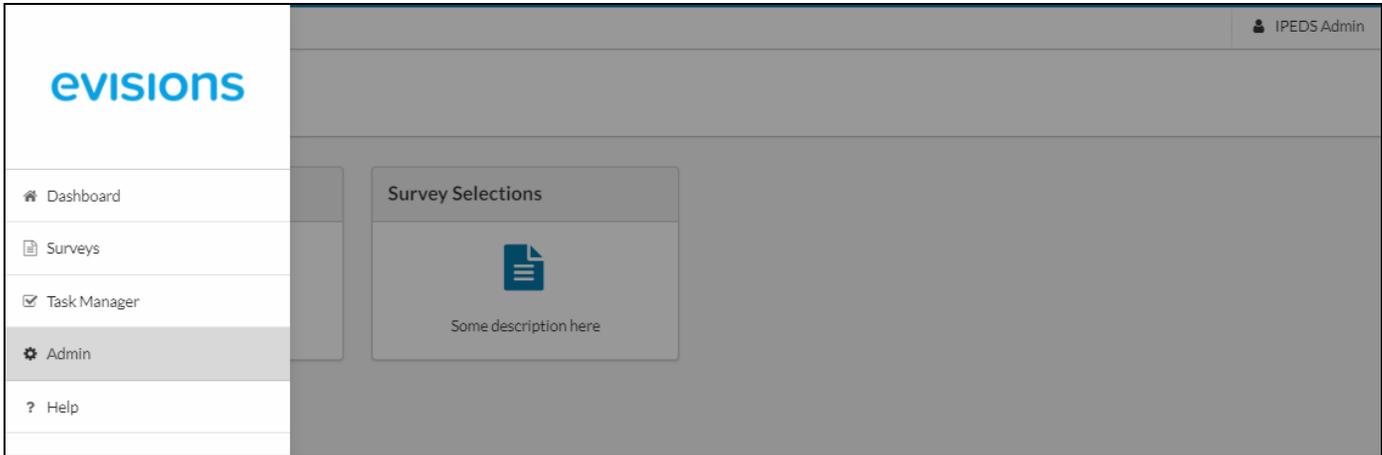
The Admin section consists of two screens:
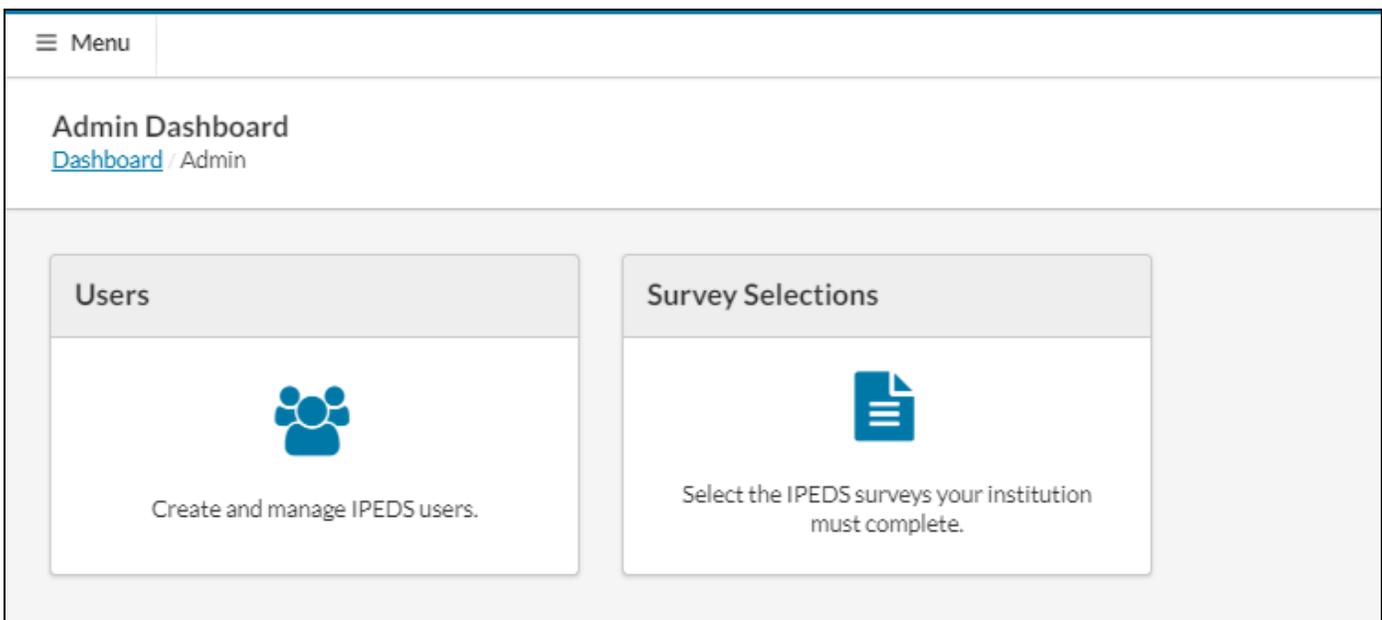
- [Users](#) - Create or upload users, edit user details, and enable or disable users.
- [Survey Selections](#) - View the list of available surveys and enable them for the institution.

Users

The Users screen in the [Admin](#) area lists all of the users who have permission to access the IRIS application.

You can browse through the list of users one page at a time, or use the search feature to quickly find the user you are looking for.

New User

To create new IRIS users, select the **New User** button in the upper right of the Users screen. Then enter the person's first name, last name, and email address.

If you want this user to be active immediately, leave the **Enabled** toggle set to Yes. Otherwise, change it to No. If this user should be an administrator (able to see the Admin section, create other users, and control which surveys are active for your institution), set the **Admin** toggle to Yes.

When you are finished, select **Save Changes** to add the user.

If you want this user to be able to log in, you will then need to select the **Send Activation Email** button that appears underneath the user's saved information. This email will prompt the user to log in and create a password for their account.
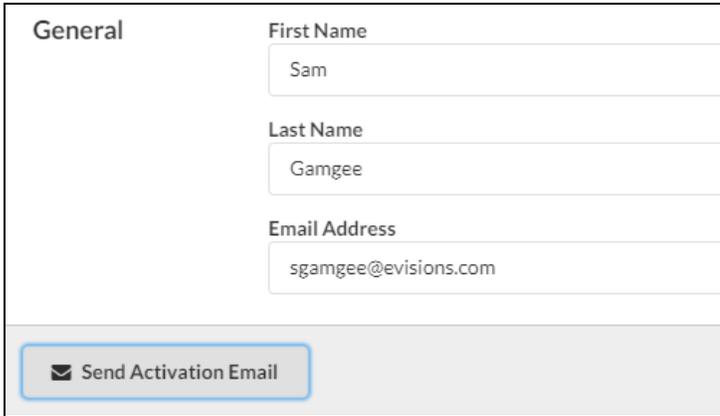
Please note that the activation email will be valid for 30 minutes. If the user does not activate their account within that time frame, you will need to go back in to IRIS and resend the email.

Editing Existing Users

To edit an existing user, select them from the list of users to open the Edit User dialog. You can then modify any of the fields you specified when creating the user.
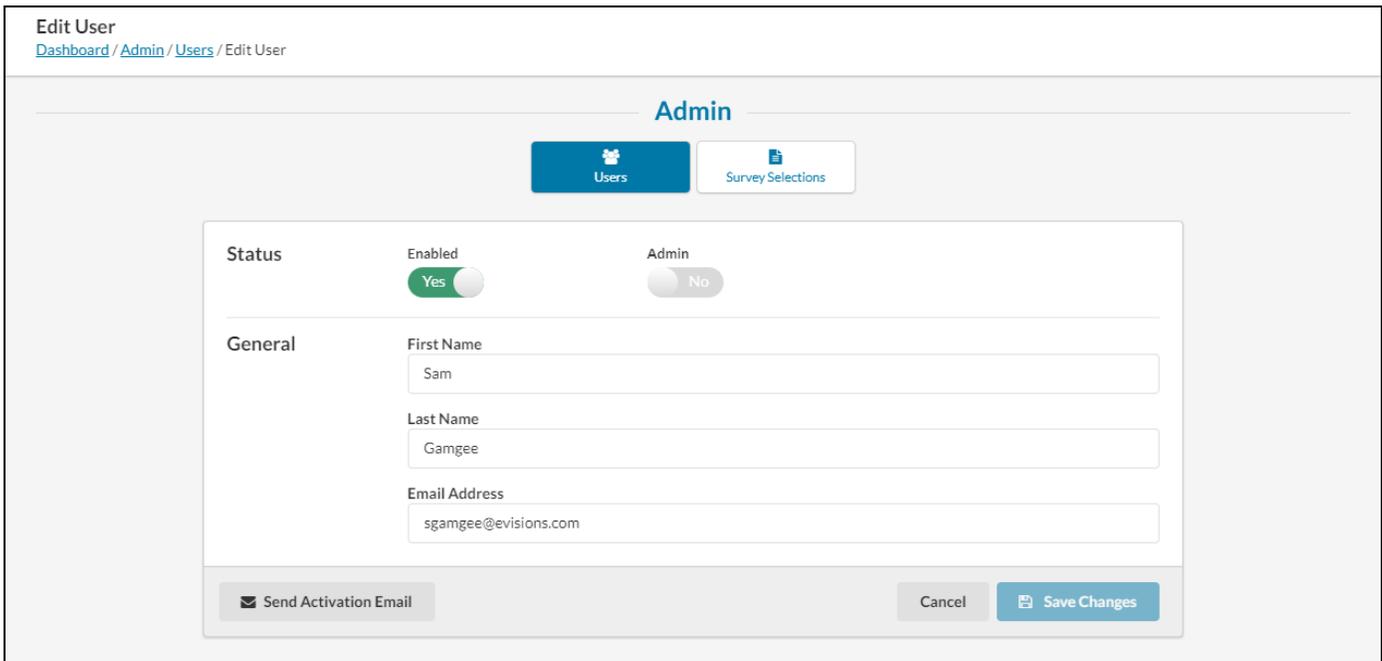
If a user has lost the activation email for their account, or did not activate it within the 30 minute expiration limit, you can resend it to them by selecting the **Send Activation Email** button at the bottom of the screen.

Unneeded Users

If a user should no longer have access to IRIS, you can set Enabled to "no" for this user. This will deactivate the user and move them to the end of the list of users. IRIS does not allow you to delete users, only deactivate them, since deleting a user would affect historical survey information. Deactivated users cannot be assigned to any new survey roles or tasks.

Survey Selections

The Survey Selections screen is where you enable the surveys that need to be completed by your institution. Institutions are required to submit data for all survey components, unless the data does not apply to that institution. Some survey components have multiple options that you can choose from, depending on the institution's characteristics. You can use the list of filters on the left to narrow down the available options to only those that pertain to your institution.

For more information on the survey selections and to determine which version of each component your institution must complete, refer to the NCES website at https://surveys.nces.ed.gov/ipeds/VisIndex.aspx.

To enable a survey, check the box to the right of its name. Enabled surveys show up on the Surveys screen, sorted by status so that you can see your institution's current progress.

IPEDS Calendar Year

Select the calendar year for the surveys you want to view.

Survey Filters

You can filter out surveys based on characteristics such as the institution type, term length, granting type, reporters type, cohort type, tenure system, HR staff size, finance reporting standards, and non-profit status. The Clear Filters button at the bottom of the Filters list resets your selection and displays all surveys.

Available Surveys

Fall Data Collection

Completions

Completions data are collected for award levels ranging from postsecondary certificates of less than 1 year to doctoral degrees. Data collected include:

- Degree completions by level and other formal awards by length of program, by race/ethnicity and gender of recipient, and by program (6-digit CIP code).
- The number of completers at an institution by gender, by race and ethnicity, and by age. These data are collected at the total as well as by award level.
- Programs that are offered completely via distance education.

IPEDS also collects information on the number of students receiving degrees with double majors by 6-digit CIP code (for the second major) and by race/ethnicity and gender of recipient.

12-Month Enrollment

12-month enrollment data are collected for students enrolled in credit-bearing courses at the undergraduate and graduate levels. The 12-month reporting period is July 1-June 30. Data collected/calculated include:

- Unduplicated headcounts by level of student and by race/ethnicity and gender;
- Instructional activity (contact or credit hours); and
- Full-time equivalent (FTE) enrollment (calculated based on instructional activity). FTE is used in computing expenses by function per FTE and revenues per FTE, which are reported on the IPEDS Data Feedback Report.

You can choose from the following 12-Month Enrollment surveys:

- 12-month Enrollment for 4-year institutions
- 12-month Enrollment for less-than-4-year institutions

Institutional Characteristics

The Institutional Characteristics survey collects general information about the institution, such as:

- Institution address, telephone number, and website;
- Educational offerings and mission statements;
- Control/affiliation, award levels, and calendar system; and
- Student charges, including cost of attendance data (tuition and required fees and room and board charges for institutions with full-time, first-time degree/certificate-seeking undergraduate students)

You can choose from the following Institutional Characteristics surveys:

- Institutional Characteristics for 4-year academic year tuition reporters
- Institutional Characteristics for degree-granting 2-year academic year tuition reporters
- Institutional Characteristics for non-degree-granting 2-year academic year tuition reporters
- Institutional Characteristics for less-than-2-year academic year tuition reporters

Winter Data Collection

Student Financial Aid

Financial aid and military benefits are collected for students.

- Section 1 of SFA collects financial aid data for undergraduate students. Additional, data are collected for full-time, first-time degree/certificate-seeking undergraduate students to calculate the annual average net price of college attendance in accordance with the Higher Education Act of 1965, as amended.
- Section 2 of SFA collects military service members and veteran's benefits (DoD Tuition Assistance Program and VA Post 9/11 GI Bill) for undergraduate and graduate students.

You can choose from the following Student Financial Aid surveys:

- Student Financial Aid for public institutions reporting on a fall cohort (academic reporters)
- Student Financial Aid for private institutions reporting on a fall cohort (academic reporters)

- Student Financial Aid for institutions reporting on a full-year cohort (public program reporters)
- Student Financial Aid for institutions reporting on a full-year cohort (private program reporters)
- Student Financial Aid for institutions with graduate students only (academic reporters)
- Student Financial Aid for institutions with graduate students only (program reporters)

Graduation Rates

Graduation rates data are collected for full-time, first-time degree/certificate-seeking undergraduate students, and includes:

- Number of students entering the institution as full-time, first-time degree or certificate-seeking students in a particular year (cohort), by race/ethnicity and gender;
- Number of students completing their program within a time period equal to one and a half times (150%) the normal period of time; and
- Number of students who transferred to other institutions.

You can choose from the following Graduation Rates surveys:

- Graduation Rates for 4-year institutions reporting on a fall cohort (academic reporters)
- Graduation Rates for 4-year institutions reporting on a full-year cohort (program reporters)
- Graduation Rates for 2-year institutions reporting on a fall cohort (academic reporters)
- Graduation Rates for 2-year institutions reporting on a full-year cohort (program reporters)
- Graduation Rates for less-than-2-year institutions reporting on a fall cohort (academic reporters)
- Graduation Rates for less-than-2-year institutions reporting on a full-year cohort (program reporters)

Graduation Rates 200%

Additional graduation rates data are collected for full-time, first-time degree/ certificate-seeking undergraduate students at less than 4-year institutions and full-time, first-time bachelor's or equivalent degree-seeking undergraduate students at 4-year institutions. The GR200 component further tracks the status of students who were reported in GR at 200% of normal time of completion. This survey was developed to fulfill requirements in the Higher Education Act, as amended.

You can choose from the following Graduation Rates 200% surveys:

- 200% Graduation Rates for 4-year institutions
- 200% Graduation Rates for less-than-4-year institutions reporting on a fall cohort (academic reporters)
- 200% Graduation Rates for less-than-4-year institutions reporting on a full-year cohort (program reporters)

Admissions

The admissions component collects basic information on the selection process including:

- Requirements for admission;
- Admissions yields; and
- Test scores (for institutions where test scores are required).

Outcome Measures

Outcome data are collected from degree-granting institutions on 4 degree/certificate-seeking undergraduate student cohorts: (1) full-time, first-time; (2) part-time, first-time; (3) full-time, non-first-time entering; and (4) part-time, non-first-time entering students. These cohorts are further broken down into 8 subcohorts of Pell Grant recipients and non Pell Grant recipients starting in 2017-18. For each of the 4 cohorts, the component collects an award status update at 3 time points 4-, 6- and 8-years. Also, at 8 years after the cohort enters the institution, OM collects on the following categories:

- Received award;
- Did not receive award, still enrolled at reporting institution;
- Did not receive award, has left the institution and enrolled at another institution; and
- Did not receive award, subsequent enrollment status unknown

A total of students who did not receive an award will be calculated.

Spring Data Collection

Human Resources

The Human Resources data collected includes:

- Employees by primary occupational activity, faculty status, full and part time (collected separately for medical schools)
- Full-time instructional staff by academic rank, gender, and contract length/teaching period
- Total salary outlay and number of months covered, by academic rank and gender
- Full-time and part-time employees by primary occupational activity, race/ethnicity and gender
- New hires by primary occupational activity, race/ethnicity and gender

You can choose from the following Human Resource surveys:

- Human Resources for degree-granting institutions and related administrative offices that have 15 or more full-time staff and a tenure system
- Human Resources for degree-granting institutions and related administrative offices that have 15 or more full-time staff, no tenure system
- Human Resources for degree-granting institutions and related administrative offices that have less than 15 full-time staff
- Human Resources for non-degree-granting institutions and related administrative offices

Fall Enrollment

Fall enrollment data are collected for all students enrolled in credit-bearing courses/programs which could potentially lead to awards ranging from postsecondary certificates of less than 1 year to doctoral degrees. Data collected include:

- The number of full and part-time students enrolled in the fall by level, race/ethnicity, and gender;
- Residence and high school graduation status of first time, first-year students (in even years);
- Age of students (in odd years);
- Cohort numbers to compute retention rates;
- Student-to-faculty ratio; and
- Distance education.

In even-numbered years, four-year institutions are also required to provide enrollment data by level, race/ethnicity, and gender for 9 selected fields of study for the Office for Civil Rights.

You can choose from the following Fall Enrollment surveys:

- Fall Enrollment for 4-year degree-granting institutions
- Fall Enrollment for 2-year degree-granting institutions
- Fall Enrollment for public 2-year and less-than-2-year non-degree-granting institutions
- Fall Enrollment for private 2-year and less-than-2-year non-degree-granting institutions

Finance

This component collects data related to the financial condition of the institution. Data collected include:

- Revenues by source (e.g., tuition and fees, government grants and contracts, private gifts);
- Expenses by function (e.g., instruction, research, academic support, institutional support);
- Assets and liabilities; and
- Scholarships and fellowships.

Different formats are used based on the institution's accounting standards (GASB or FASB).

You can choose from the following Finance surveys:

- Finance for degree-granting public institutions using gasb reporting standards
- Finance for degree-granting private, not-for-profit institutions and public institutions using FASB reporting standards
- Finance for degree-granting private, for-profit institutions
- 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

Academic Libraries

The Academic Libraries component collects basic information on library collections, expenditures, and services for degree-granting postsecondary institutions. Data collected include:

- Counts of books, media, serials, and database collection held in the physical and digital/electronic form; and
- Library expenditures on salaries/wages, materials/services, and operations/maintenance.

Institutions with annual library expenditures less than $100,000 are only required to report collections information.

Survey Owner

The survey owner is the person responsible for ensuring the survey's completion. Use the **Assign Owner** link at the bottom of each survey to open the **Survey Options** dialog, where you can specify the responsible party.
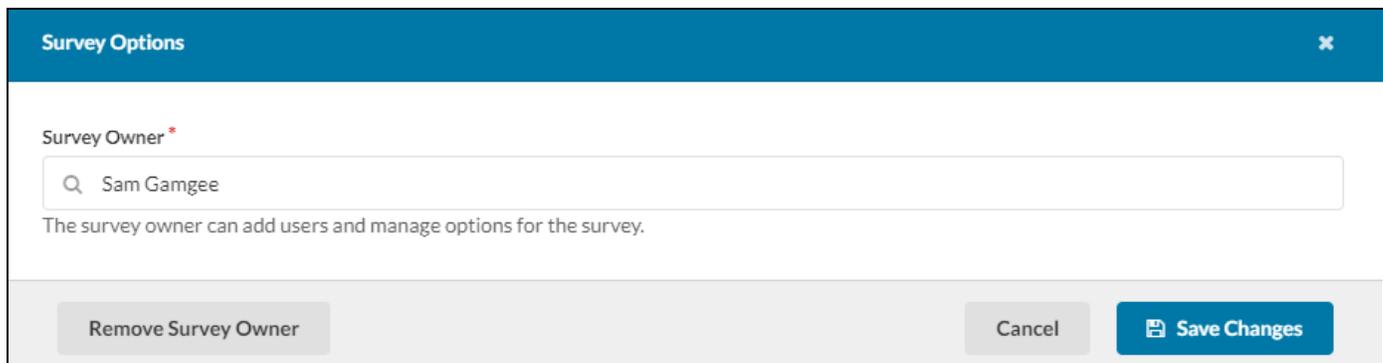
Survey Options	✖
Survey Owner *	
🔍 Sam Gamgee	
The survey owner can add users and manage options for the survey.	
Remove Survey Owner	Cancel 💾 Save Changes

Enter the name of the user you want to assign in the **Survey Owner** field, then select **Save Changes**.

You can change the owner at any time by selecting a new survey owner in the Survey Options dialog. You can also remove the current survey owner without selecting a new one using the **Remove Survey Owner** button.

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 support ticket.

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 ticket, or search the Knowledge Base.
- Knowledge Base - Answers to common questions.
- Forums - Collaborate with other IRISusers.

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.