

Introduction to Panther Analytics

Training Part 1 of 2

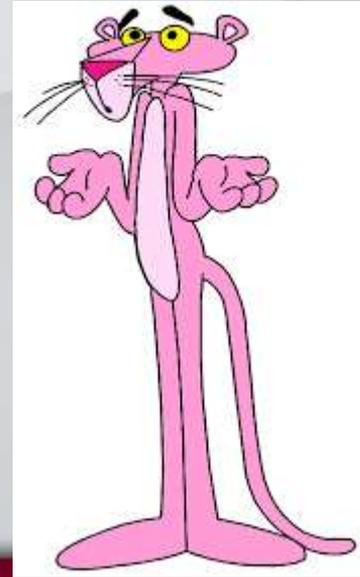
Ken Murphy

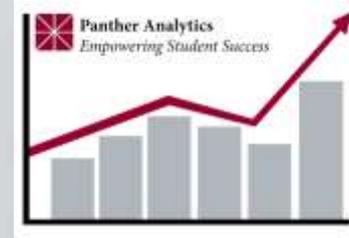
Associate Provost for Academic Administration

Summer 2018

Panther Analytics Training: What and Why?

- A two part series on learning and using Panther Analytics (PA)
 - **Part 1: Introduction to Panther Analytics**
 - Overview of Business Intelligence systems
 - Good data practices
 - Basics of accessing Panther Analytics
 - Part 2: Reporting using PA



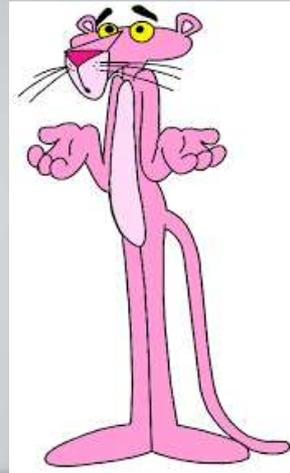


At the end of this session you will be able to:

- Describe the purpose and structure of the Panther Analytics (PA) initiative
- Explain basic business intelligence (BI) terminology and describe BI architecture
- Articulate good practices with regard to handling sensitive data
- Login to PA
- Know how to move around in PA

What is Panther Analytics?

A project to provide timely, self-driven descriptive and predictive analytics to Chapman University personnel who can use the information to enhance student success



Panther Analytics is a Business Intelligence (BI) System!

- Business Intelligence is a set of methodologies, processes, architectures, and technologies that transform raw data into meaningful and useful information used to enable more effective strategic, tactical, and operational insights and decision-making
 - [Forrester Research](#) (accessed 2/22/18)

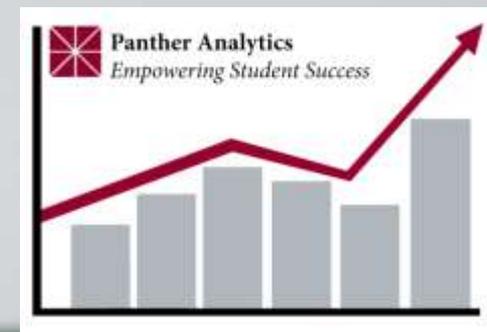
Panther Analytics Project Phase 1 Rollout in April 2017

- Phase 1 project-roll out a single “storybook” (dashboard) of reports that are valuable for associate and assistant deans, department chairs and staff
 - “Campus DeanChair Story Board”
 - Data source: PeopleSoft Campus Solutions
 - Architects: Personnel from IS&T, Registrar, Admissions, Provost, and the Panther Analytics Advisory Group

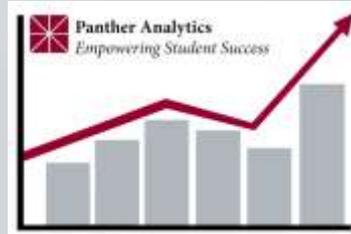


History of the Panther Analytics Project

- Project Initiation-Jan 2016
- Software Selection-Spring/Summer 2016
- Technical Development-Fall 2016
- Report and Storyboard Development-Fall 2016 / Winter 2017
- Pilot Rollout → March 2017
- Full Rollout → April 2017



Phase 2 of Panther Analytics 2018 →



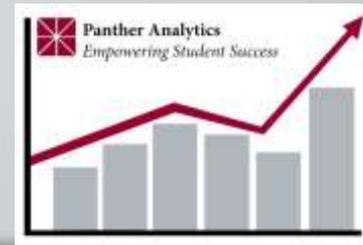
- Phase 2 is really many projects!
 - Admissions Funnel
 - Budget/Financial Information
 - Visibility to Human Resource data
 - Advising information....and more....
- We are also continually upgrading and improving the original Dean-Chair Storyboard
 - This will happen essentially forever based on user inputs

Typical BI Project Task Groups

- Systems/Technical
- Security
- Project Management
- Report and Storyboard Development
- User Acceptance Testing
- Marketing
- Training and Helpdesk
- Sponsor
- Governance

Panther Analytics Development Team (Feb 2018)

- Lauri Mantooth, IS&T
- John Bui, IS&T
- Robert Pankey, CIRO
- Nick Andreosky,
Admissions/Registrar
- Andy Sison, Admissions
- Rose Yap-Fryman, IS&T
- Kristin Dressner, Provost
- Janice Moody, IS&T
- Stephanie Takemoto, Provost
- Marisol Arredondo Samson, CIRO
- Michelle Clark, Financial Services
- Sharlene Heard, Financial Services
- Leslie Yoshimizu, Financial Services
- Patrick Rausch, Purchasing
- Aday Oyenuga, Purchasing
- Bao Nguyen, Human Resources
- Garrett Eastwood, IS&T
- Helen Norris, IS&T
- Ken Murphy, Provost
- ...and, you!



Panther Analytics Landing Page

www.chapman.edu/pantheranalytics

The screenshot shows the Panther Analytics landing page. At the top is the Chapman University logo and a navigation menu with links for ABOUT, ACADEMICS, ADMISSION, ARTS, CAMPUS LIFE, RESEARCH, and SUPPORT. Below the navigation is a breadcrumb trail: Campus Services > Information Systems & Technology > Software > Panther Analytics.

Software

- Skype for Business
- Dropbox
- NVivo
- EndNote
- Mathematica
- SPSS
- ChemDraw
- Adobe Creative Cloud
- Pol Everywhere
- Quetrics
- Microsoft Office 365

Panther Analytics

Panther Analytics is the university's data warehouse, a business analysts tool acquired to give staff, faculty and administrators access to timely up-to-date reports and data needed for day-to-day work-related activities, as well as for assessment, planning and informed decision making.

It provides easy, self-serve access to well-designed reports containing up-to-date data within a few clicks. This highly sophisticated reporting tool will allow you to run reports that can identify key metrics such as enrollment counts and percentages with drill down capabilities to identify specific college/school, department, course level or student level information.

What is Panther Analytics?

- Get your data from anywhere
- Go easily beyond the data
- Self-serve reporting
- Reports are easy to build
- Share and other capabilities
- It's easy to learn & use

This new tool can do the following

Key Features

What Type of Data Does It Contain?

Login to Panther Analytics

Feedback

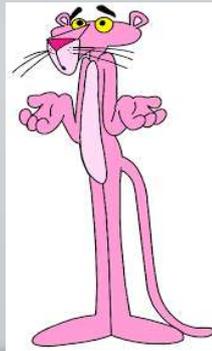
We'd like to hear from you! Let us know how we're doing by filling out our Feedback Form.

Need Assistance / Support?

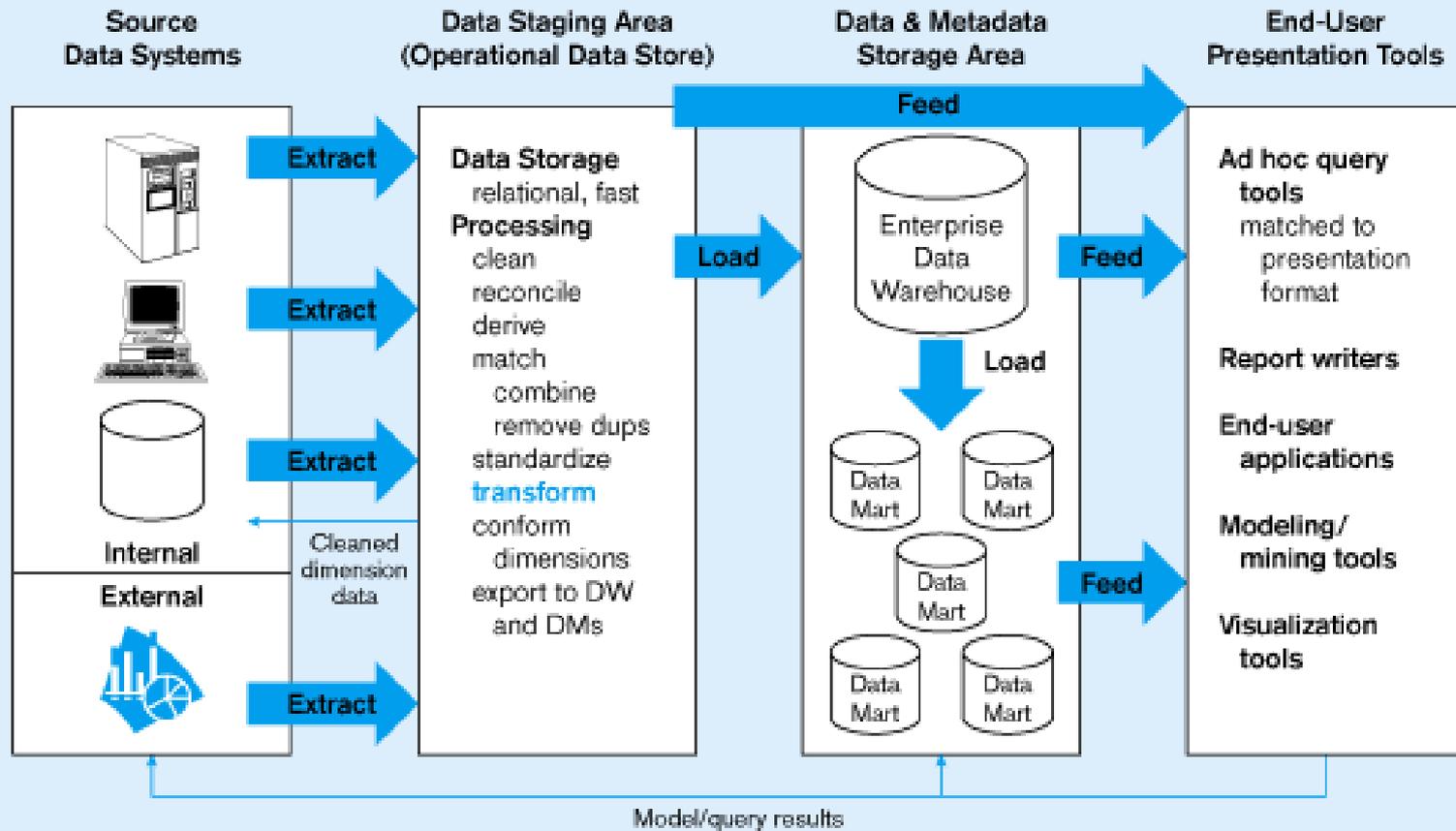
Send us an email at pantheranalytics@chapman.edu or call (714) 516-5526.

So, what is Panther Analytics?

- Sophisticated reporting (Business Intelligence) for Chapman's managers and staff,
- Based on "real-time" data from our transactional systems (e.g., PeopleSoft),
- Built at Chapman by its business users with (a lot of) support from IS&T, so that we can
- Report on where we stand today, and to
- Inform our decisions regarding what to improve



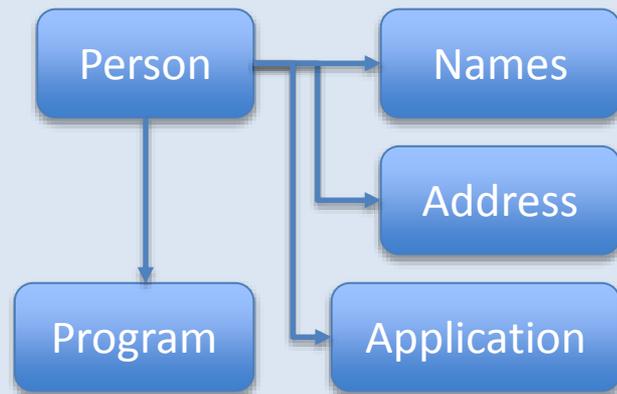
Things you don't need to know 1: Common Data Warehouse Architecture



Things you don't need to know 2: Transaction Systems and Reporting Systems

Transactional Systems

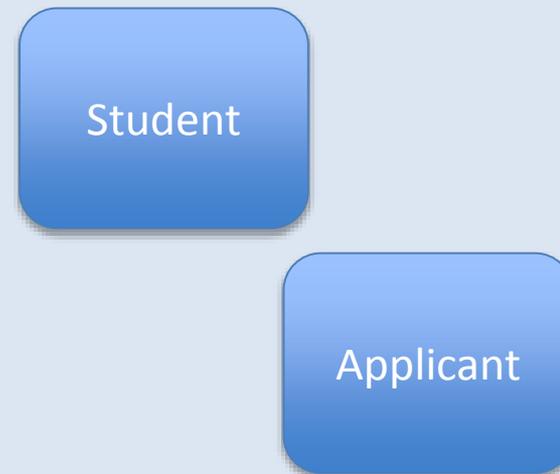
Built to allow for the recording of actions over time



May have multiple records for each person in each of the tables below, managed by effective dating. Complicated reporting

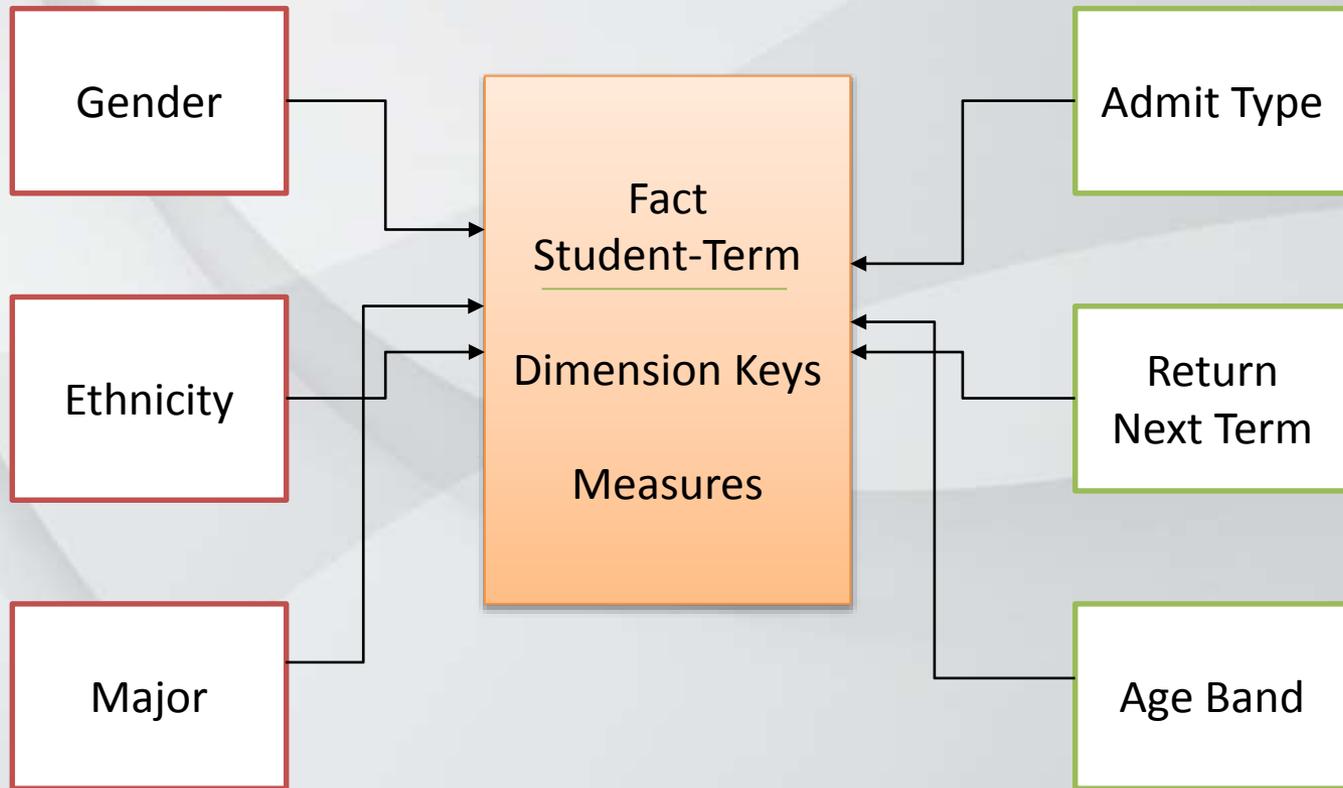
Reporting Systems

Built to simplify data structures and standardize around a unit of analysis



One record per unit of analysis with appropriate effective date logic applied.

Things you don't need to know 3: Reporting Systems and Star Schema



Things you don't need to know 4: Our Vendors

- PeopleSoft (Oracle)—ERP
 - Campus Solutions
 - Human Capital Management
 - Finance
- Blackboard Analytics—Data Warehouse
- Pyramid Reporting—Tool for reporting

Panther Analytics is comprised of these two!

Panther Analytics Quiz:

Part A-Definitions



- Panther Analytics is a (transaction/reporting) system. Which?
 - Reporting-Our PeopleSoft systems are the transaction systems
- Do we use a business intelligence system to collect data?
 - No-we use it to report out!
- PeopleSoft, our transaction system, provides reports. (T/F)
 - True, but we would rather not use PeopleSoft for this purpose...
- As a reporting system, the Panther Analytics project is complete as a “Big-Bang” (all at once) rollout. We are done with implementation for all practical purposes. (T/F)
 - False, as a reporting system/tool, the project will actually never be completed, but instead will continuously be improved in support of us

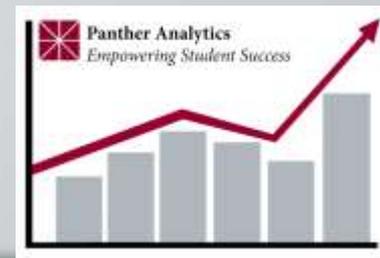
Value of Panther Analytics Data



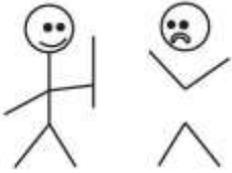
- Chapman's University data is valuable!
 - Without it we wouldn't be able to operate
 - With it, we may be able to better track the past and to predict the future
 - Make better decisions on behalf of our students
 - Provide insights into the performance of our schools
- Certainly, we should take great care in the way we handle Chapman University data
 - We all need to be aware of good data practices

Panther Analytics Data Integrity and Security

- Data is clearly an important asset to Chapman University
- We are confident that the data is accurate (has integrity), thus enhancing its value for everyone
 - Panther Analytics allows very fast access to live (daily) student data to aid in reporting and decision making
- Data security is also a key concern of the Panther Analytics team
 - Student data is sensitive
 - Ex: ID, gender, home addresses, GPA, etc.



I've got your back!



Vignette 1: Erik and Jayna

- Jayna is Erik's boss. Jayna tells Erik to obtain the student email addresses for those students in the Minor in Fermentation Sciences. Erik downloads the emails from Panther Analytics and saves them as a spreadsheet on his work computer. Jayna says, "send me the student contacts when you have them, I need to let them know about some special course offerings when they are registering for classes this fall term". What is Erik's next step?

Panther Analytics Data is Moderate and High Risk Data

Did you know that:

- High Risk Data is protected by federal and state regulations
- High Risk Data is covered by Chapman policies which include the
 - Computer and Acceptable use policy
 - Privacy policy
- Disclosure of moderate or high risk data to unauthorized recipients could result in a significant adverse impact on our mission, safety, finances or reputation
 - In the case of high risk data Chapman U may be required to report this disclosure to individuals or the government



Data Risk Levels

Working Definitions for Panther Analytics

- Low Risk Data
 - Information that is the public domain
- Moderate Risk Data
 - FERPA Data (except see below)
- High Risk Data
 - Student social security number, student home address

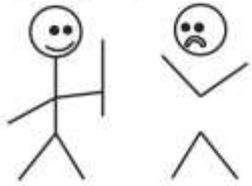
Working with Moderate and High Risk Data: Good Practices

	Low Risk	Moderate Risk	High Risk
	Data in the public domain	FERPA Data except →	Home Address, Social Security #
Sharing Data			
Email	XXX		
Dropbox	XXX	XXX	
Shared Drives	XXX	XXX	XXX
Storing Data			
Local Desktop	XXX	XXX	
CU Network Drive	XXX	XXX	XXX

Working with High Risk Data: “Need to Know” Policy

- Access and use only the data is needed
 - “Need to know” includes but not limited to, the need to improve services for faculty, staff, students, and other constituents of Chapman University and in particular, your academic unit
 - Personal curiosity or use does not constitute a “need to know”
- If looking for data on a particular unit, then access/report on that unit only
 - Contacts or mailings are restricted to those students within the college/school or department that you represent

I've got your back!



Vignette 2: Joel and Marsha

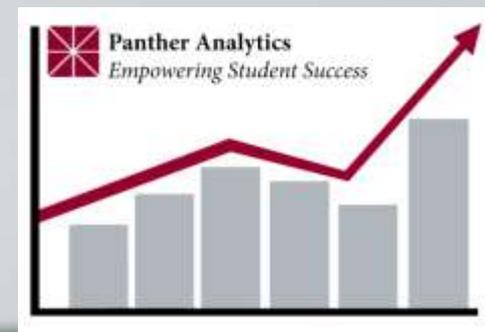
- Joel and Marsha work together in the Viticulture and Enology department. Joel has access to Panther Analytics and Marsha does not. Marsha tells Joel she needs to know what classes have low enrollment because the Associate Provost Murphy is threatening to cancel the classes and this makes her boss, the associate dean, unhappy. What should Joel do?

Panther Analytics and The Census

- As of February 2018, for all official reporting → continue to refer to census report as provided by CIRO
 - The Census is the official snapshot of where we stand
 - It is performed once a semester at a specific time
 - Panther Analytics data is dynamic and changes every day (once a day)
 - In addition, Panther Analytics does not replace some common functions like running Student Program Evaluations

Panther Analytics Required Training

- All employees using Panther Analytics must complete their FERPA training
 - We will check!
- A second “Good Practices in Data Handling” course is under consideration as required for Panther Analytics users



Policy and Training Reference Links

Acceptable Use Policy:

<http://www.chapman.edu/campus-services/information-systems/policies-and-procedures/acceptable-use-policy.aspx>

Privacy Policy:

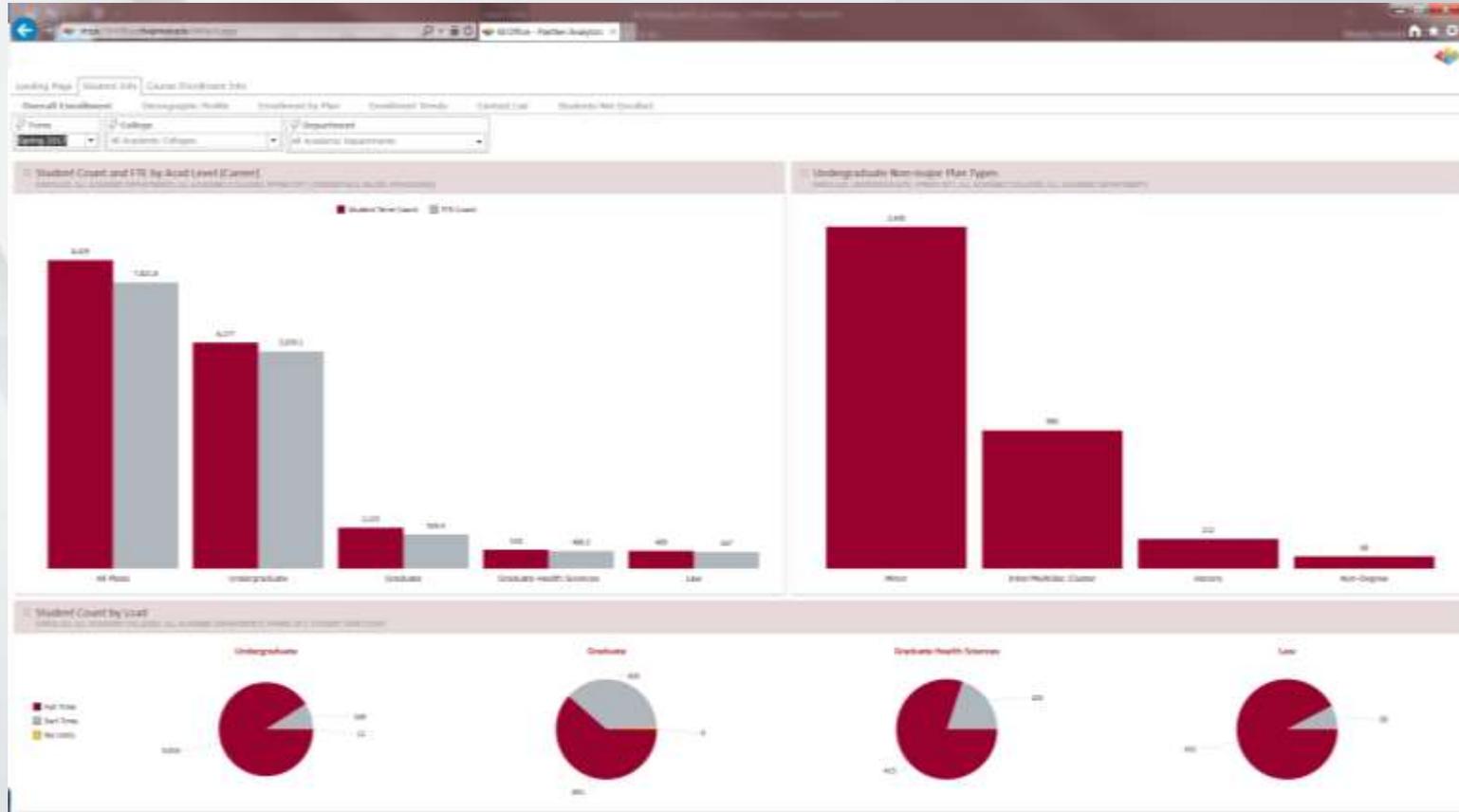
<http://www.chapman.edu/campus-services/information-systems/policies-and-procedures/privacy-policy.aspx>

FERPA Guidelines:

<http://www.chapman.edu/students/academic-resources/registrar/student-services/privacy-rights-ferpa/ferpa-guidelines.aspx>



Panther Analytics: Let's Log In!



For best results...

- Use MS Internet Explorer browser (not MS Edge)
- Yes, it does work on a MAC!



Panther Analytics Landing Page

www.chapman.edu/pantheranalytics

The screenshot shows the Panther Analytics landing page on Chapman University's website. The page features a navigation menu with links for ABOUT, ACADEMICS, ADMISSION, ARTS, CAMPUS LIFE, RESEARCH, and SUPPORT. A breadcrumb trail indicates the user's location: Campus Services > Information Systems & Technology > Software > Panther Analytics.

Software

- Sligo for Business
- Dropbox
- WUv
- EndNote
- Mathomatic
- SPSS
- ChemDraw
- Adobe Creative Cloud
- Full Everywhere
- Qualtrics
- Microsoft Office 365

Panther Analytics

Panther Analytics Empowering Student Success

Panther Analytics is the university's data warehouse, a business analysis tool acquired to give staff, faculty and administrators access to nearly up-to-date reports and data needed for day-to-day work-related activities, as well as for assessment, planning and informed decision making.

It provides easy, self-service access to well-designed reports containing up-to-date data within a few clicks. This highly sophisticated reporting tool will allow you to run reports that can identify key metrics such as enrollment counts and percentages with drill-down capabilities to identify specific colleges/school, department, course-level or student-level information.

What is Panther Analytics?

- Compare data from multiple sources
- Generate reports for data
- Self-programming
- Simple and easy to use
- Is easy to learn & use

This new tool can do the following

- Key Features
- What Type of Data Does it Contain?
- Scope of Project and Timeline
- Training Materials and other Resources

Login to Panther Analytics

Feedback

We'd love to hear from you! Let us know how we're doing by filling out our Feedback Form.

Need Assistance / Support?

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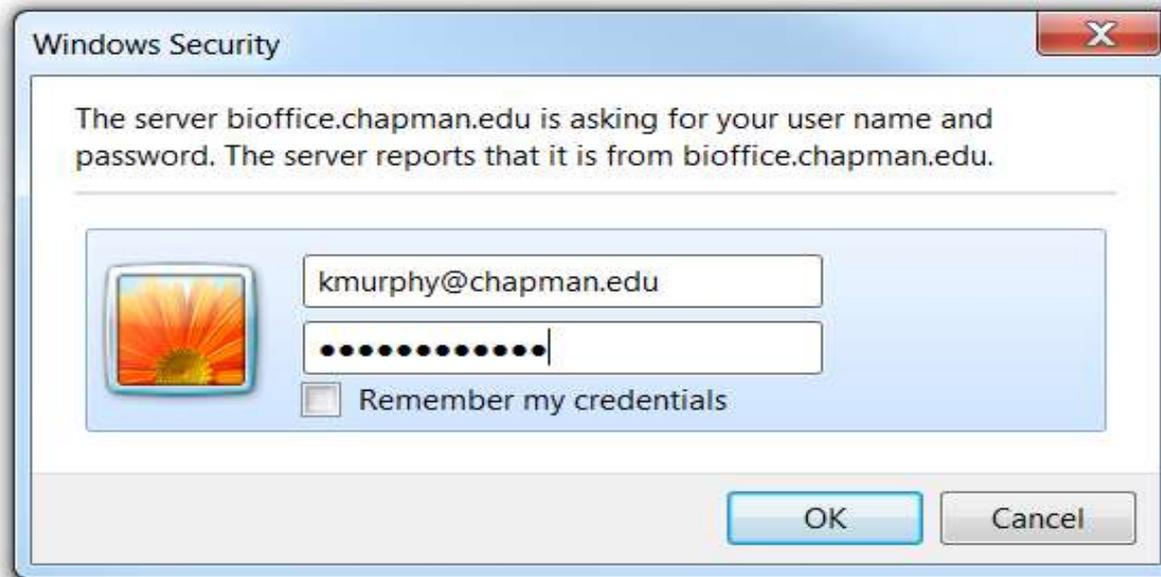
Logging into Panther Analytics

<https://biooffice.chapman.edu>



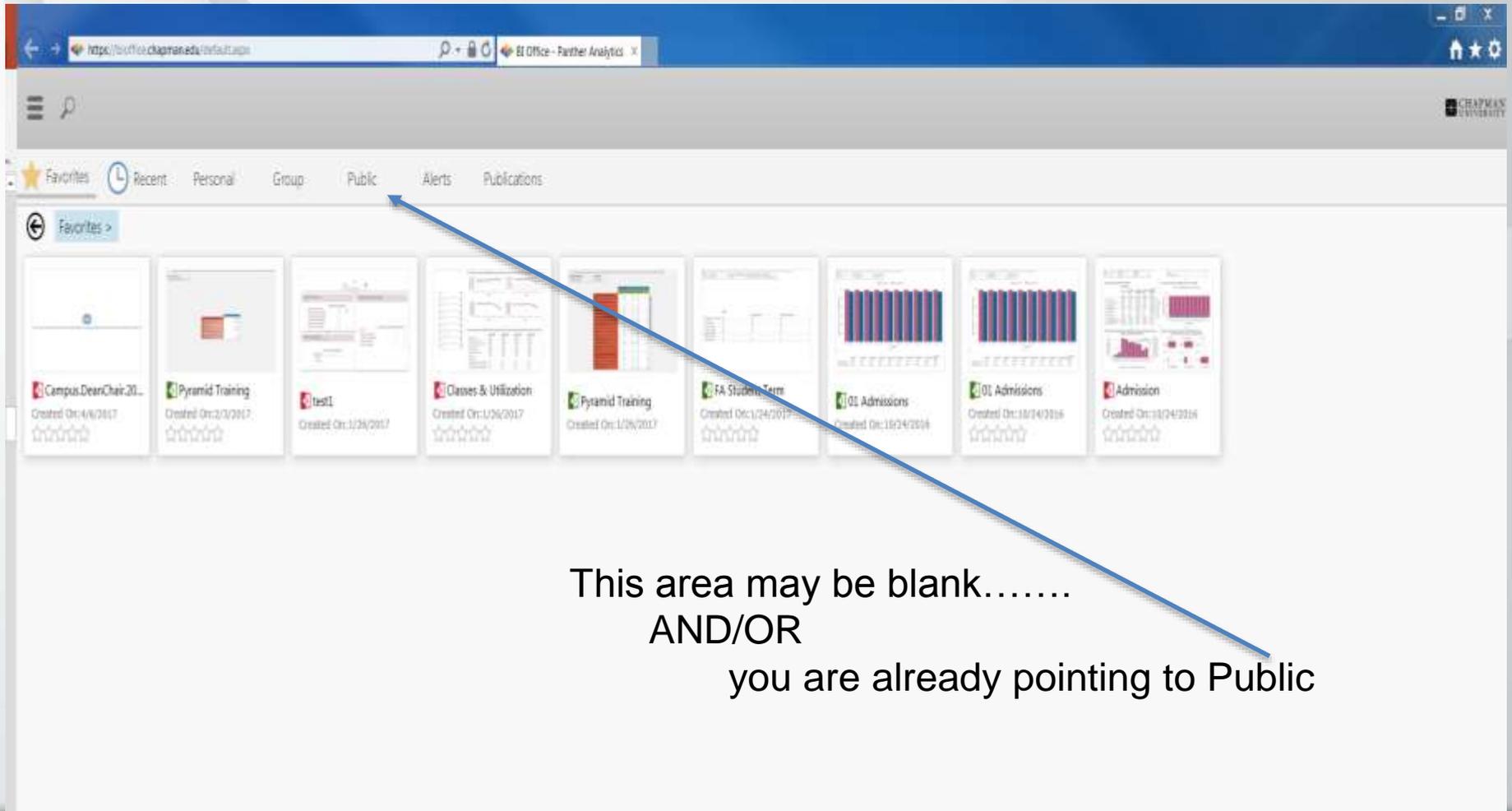
Logging into Panther Analytics

Use your CU credentials!



Panther Analytics

Start Window-Basic User Interface



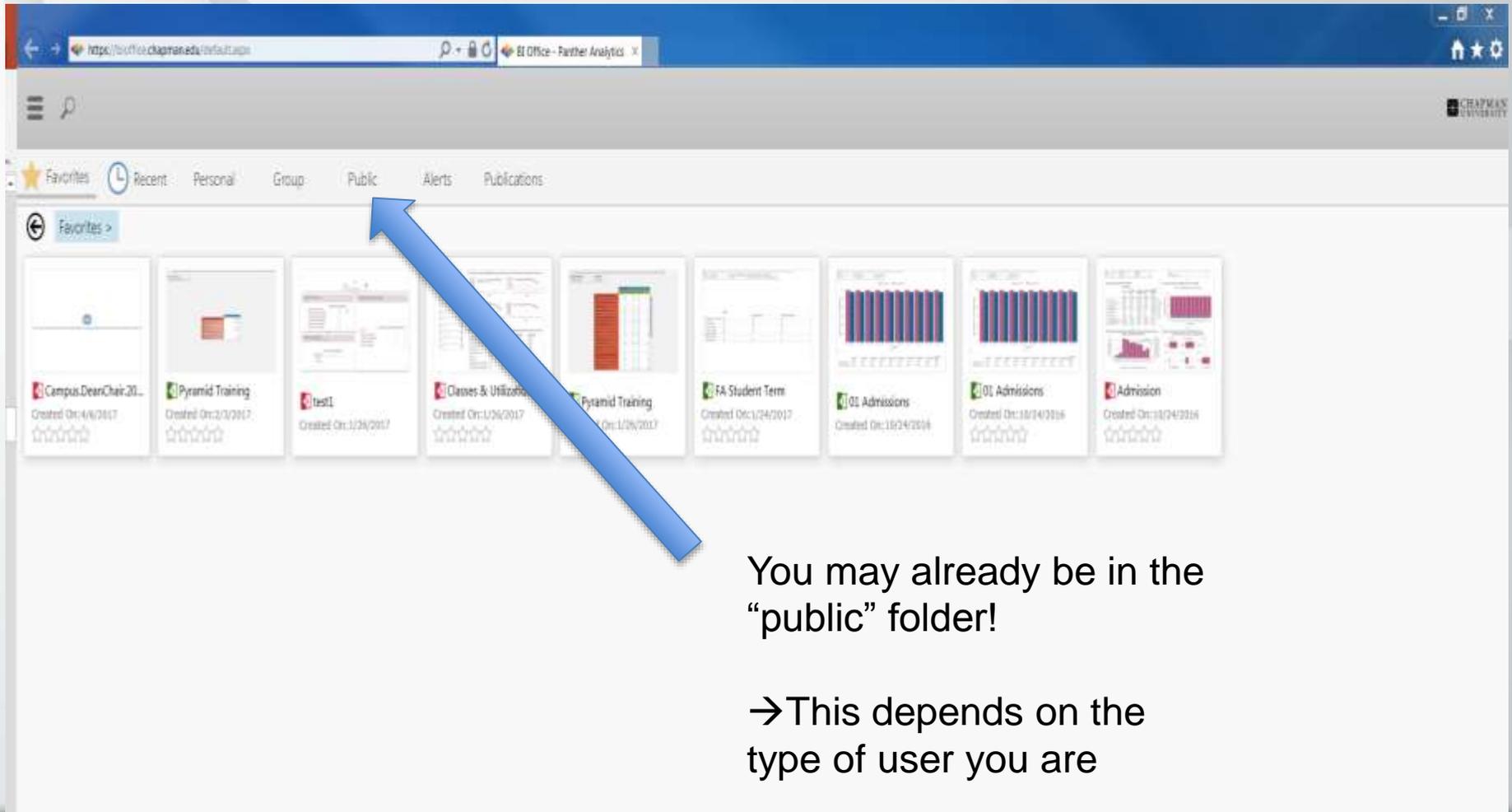
The screenshot shows a web browser window with the URL <https://bi.office.chapman.edu/default.aspx>. The page features a navigation menu with options: Favorites, Recent, Personal, Group, Public, Alerts, and Publications. The 'Public' option is highlighted with a blue arrow. Below the menu is a 'Favorites >' section containing a grid of dashboard tiles. Each tile includes a thumbnail image, a title, and a creation date. The tiles are:

- Campus.DearsChair.20... Created On: 4/6/2017
- Pyramid Training Created On: 2/3/2017
- test1 Created On: 1/26/2017
- Classes & Utilization Created On: 1/26/2017
- Pyramid Training Created On: 1/26/2017
- FA Student Term Created On: 1/24/2017
- 01 Admissions Created On: 10/24/2016
- 01 Admissions Created On: 10/24/2016
- Admission Created On: 10/24/2016

This area may be blank.....
AND/OR
you are already pointing to Public

Panther Analytics

Navigate to the Public Folder

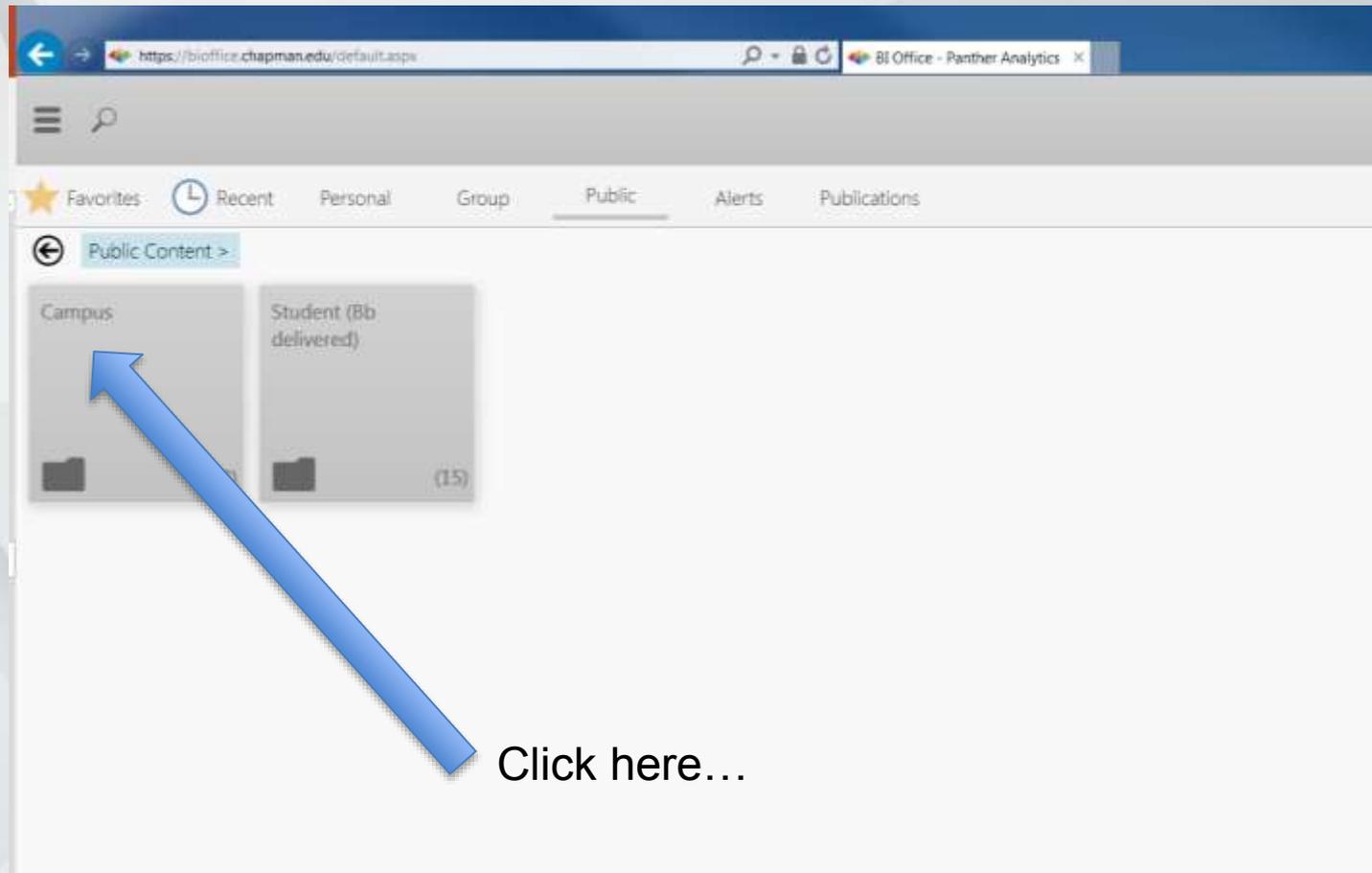


The screenshot shows the Panther Analytics web interface. The browser address bar displays <https://ocf10.chapman.edu/infault.aspx>. The navigation menu includes 'Favorites', 'Recent', 'Personal', 'Group', 'Public', 'Alerts', and 'Publications'. A blue arrow points to the 'Public' tab. Below the navigation menu, a 'Favorites >' section displays a grid of dashboard tiles. Each tile includes a thumbnail image, a title, and a creation date. The tiles are: 'Campus.DearsChair.20...' (Created On: 4/6/2017), 'Pyramid Training' (Created On: 2/3/2017), 'test1' (Created On: 1/26/2017), 'Classes & Utilization' (Created On: 1/26/2017), 'Pyramid Training' (Created On: 1/26/2017), 'FA Student Term' (Created On: 1/24/2017), '01 Admissions' (Created On: 10/24/2016), '01 Admissions' (Created On: 10/24/2016), and 'Admission' (Created On: 10/24/2016).

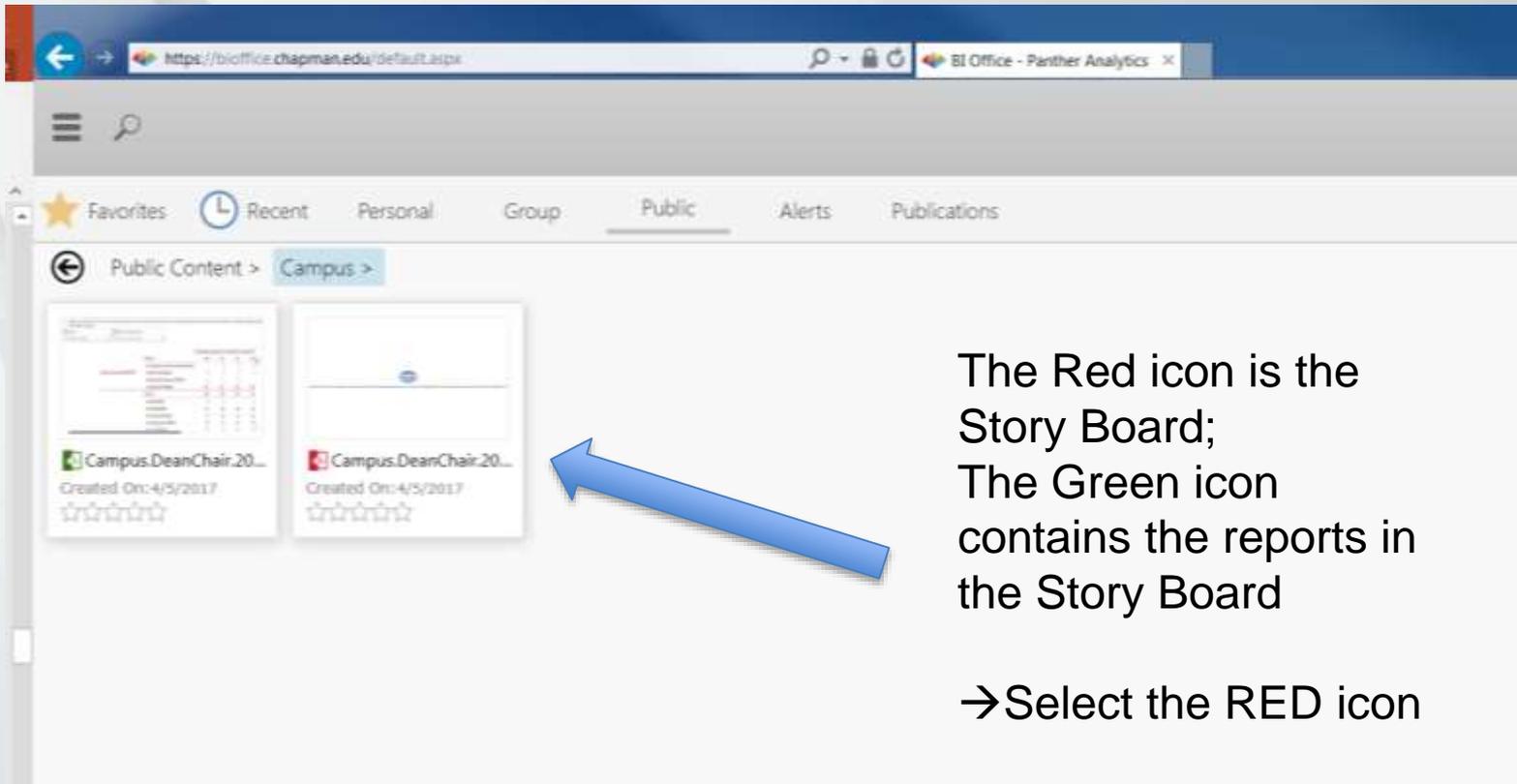
You may already be in the “public” folder!

→ This depends on the type of user you are

From the Public Folder go to Campus



In Campus folder, choose
“Campus.DeanChair”
(Red) Story Board icon



The screenshot shows a web browser window with the address bar displaying <https://biooffice.chapman.edu/default.aspx>. The browser tab is titled "BI Office - Panther Analytics". The page content shows a navigation pane with "Public Content > Campus >" selected. Below the navigation pane, there are two icons for "Campus.DeanChair.20...". The left icon has a green square and the right icon has a red square. Both icons show a preview of a report and are labeled "Created On: 4/5/2017". A blue arrow points from the right towards the red icon.

The Red icon is the
Story Board;
The Green icon
contains the reports in
the Story Board

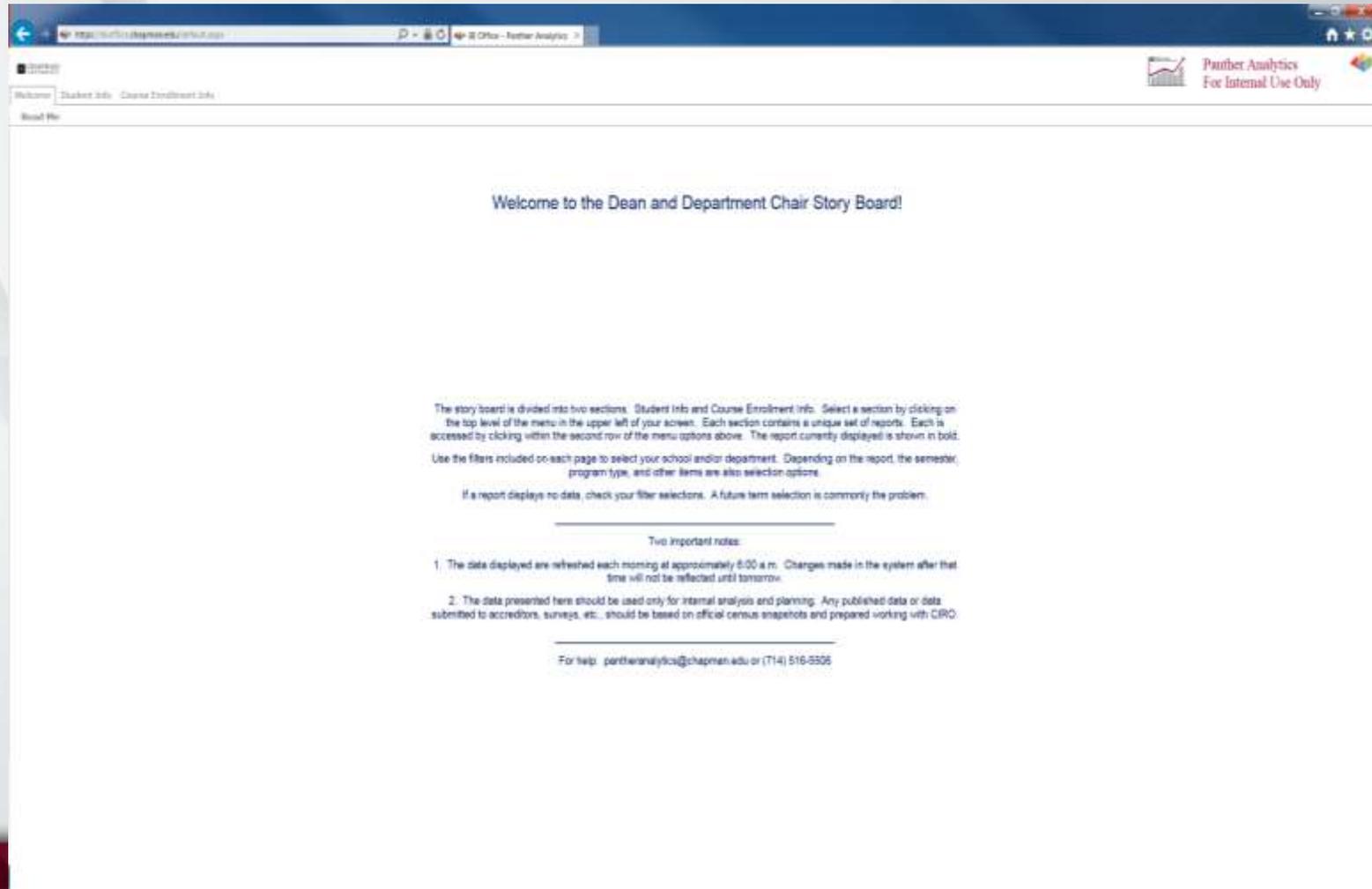
→Select the RED icon

Finally.... Choose View Story Board

The screenshot shows a web browser window with the address bar displaying <https://office.chapman.edu/infocenter.aspx>. The browser's address bar also shows "Office - Further Analytics". The page header includes navigation tabs: "Favorites", "Recent", "Personal", "Group", "Public", "Alerts", and "Publications". Below the header, the breadcrumb trail reads "Public Content > Campus > Campus.DeanChair.20170405 >". The main content area features a large document icon with the title "Campus.DeanChair.20170405". To the right of this document are several smaller preview cards for various reports: "Read Me", "Overall Enrollment", "Demographic Profile", "Enrollment by Plan", "Enrollment Trends", and "Wattle Analysis". A blue arrow points to a button labeled "View Story Board" located below the main document icon. Below the button, the following metadata is displayed: "Public Content/Campus", "Created On: 4/5/2017", "Created By: Robert Penkey", "Version: 630.3460.1915", "My Rating: ☆☆☆☆☆", and "Overall Rating: ☆☆☆☆☆".

Click here...

Dean Chair Story Board Start (Splash) Screen



The screenshot shows a web browser window with the URL <https://uofu.ca/parthenalytics/infocub.aspx>. The browser title is "Office - Parthen Analytics". The page header includes a "Parthen Analytics For Internal Use Only" logo and navigation links for "Welcome", "Student Info", and "Course Enrollment Info". The main content area features a welcome message and instructions for using the story board.

Welcome to the Dean and Department Chair Story Board!

The story board is divided into two sections: Student Info and Course Enrollment Info. Select a section by clicking on the top level of the menu in the upper left of your screen. Each section contains a unique set of reports. Each is accessed by clicking within the second row of the menu options above. The report currently displayed is shown in bold. Use the filters included on each page to select your school and/or department. Depending on the report, the semester, program type, and other items are also selection options.

If a report displays no data, check your filter selections. A future term selection is commonly the problem.

Two important notes:

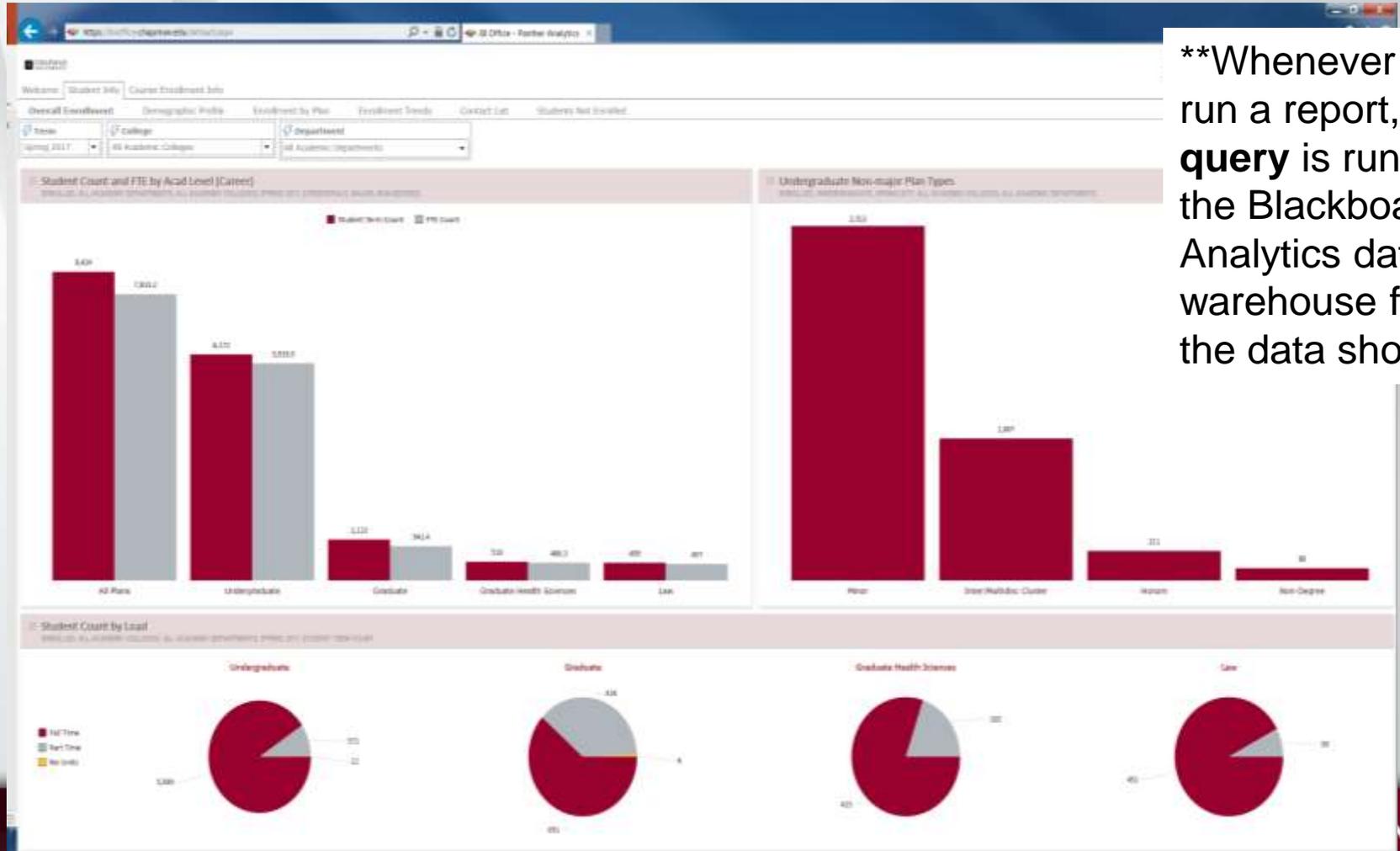
1. The data displayed are refreshed each morning at approximately 6:00 a.m. Changes made in the system after that time will not be reflected until tomorrow.
2. The data presented here should be used only for internal analysis and planning. Any published data or data submitted to accreditors, surveys, etc., should be based on official census snapshots and prepared working with CRO.

For help: parthenanalytics@chapman.edu or (714) 516-3506

Dean Chair Story Board “Student Info” tab



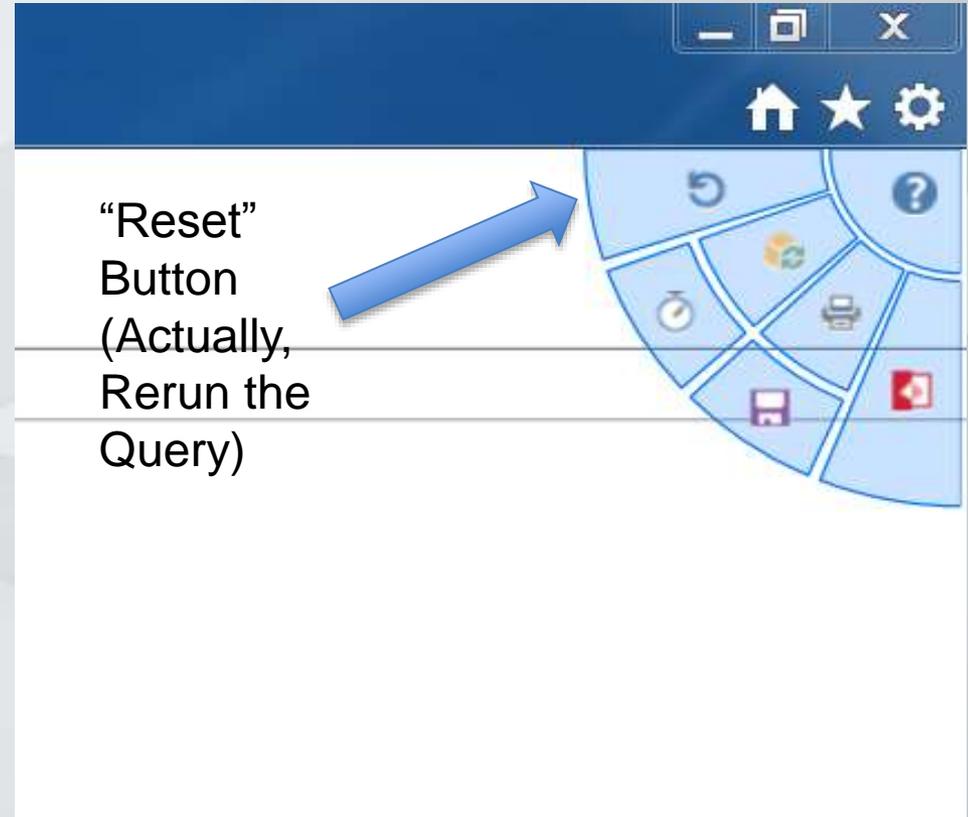
Dean Chair Story Board: Overall Enrollment Report



Whenever you run a report, a **query is run on the Blackboard Analytics data warehouse for the data shown

Key Feature and Rule #2

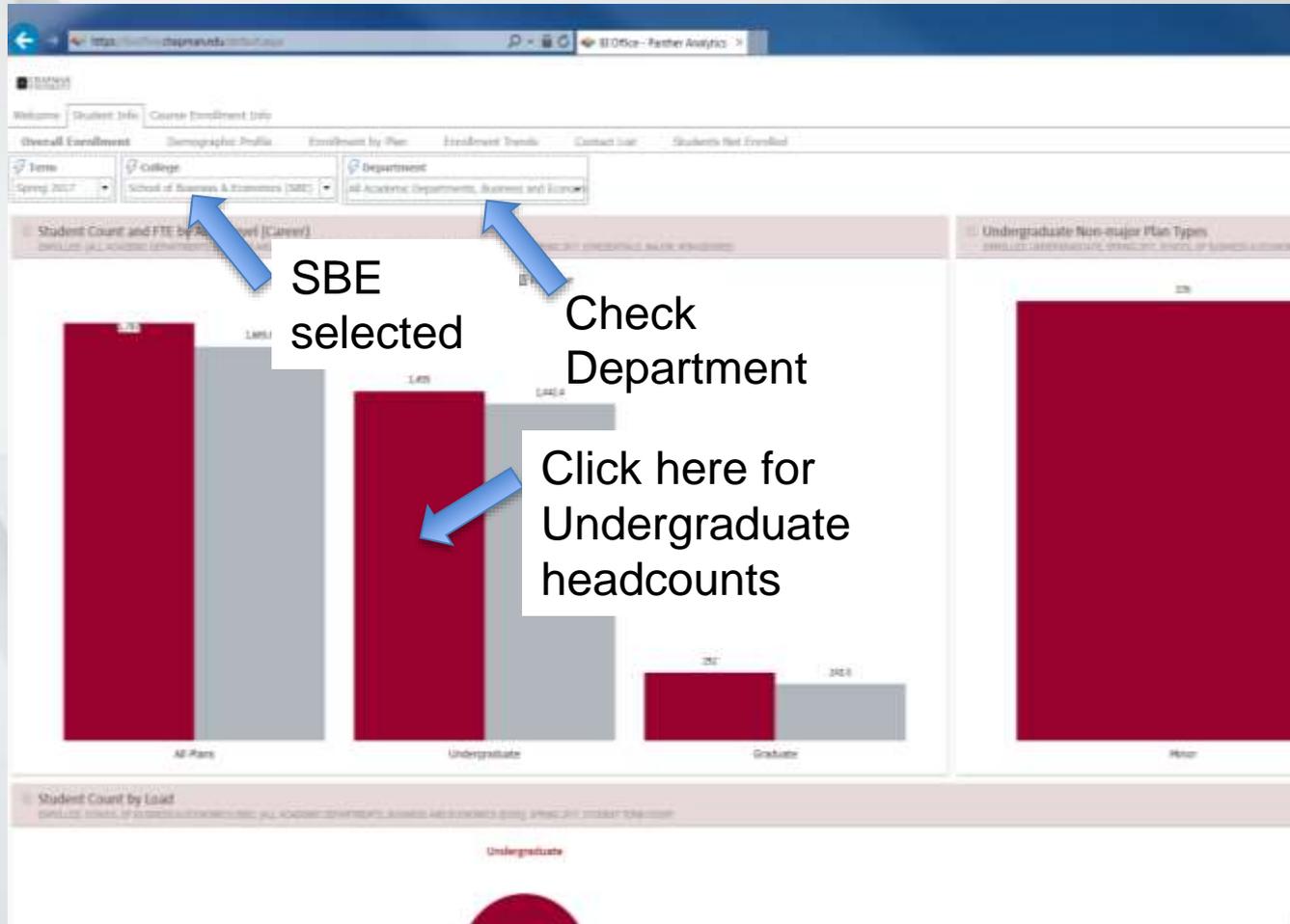
If stuck, use the “Reset” button



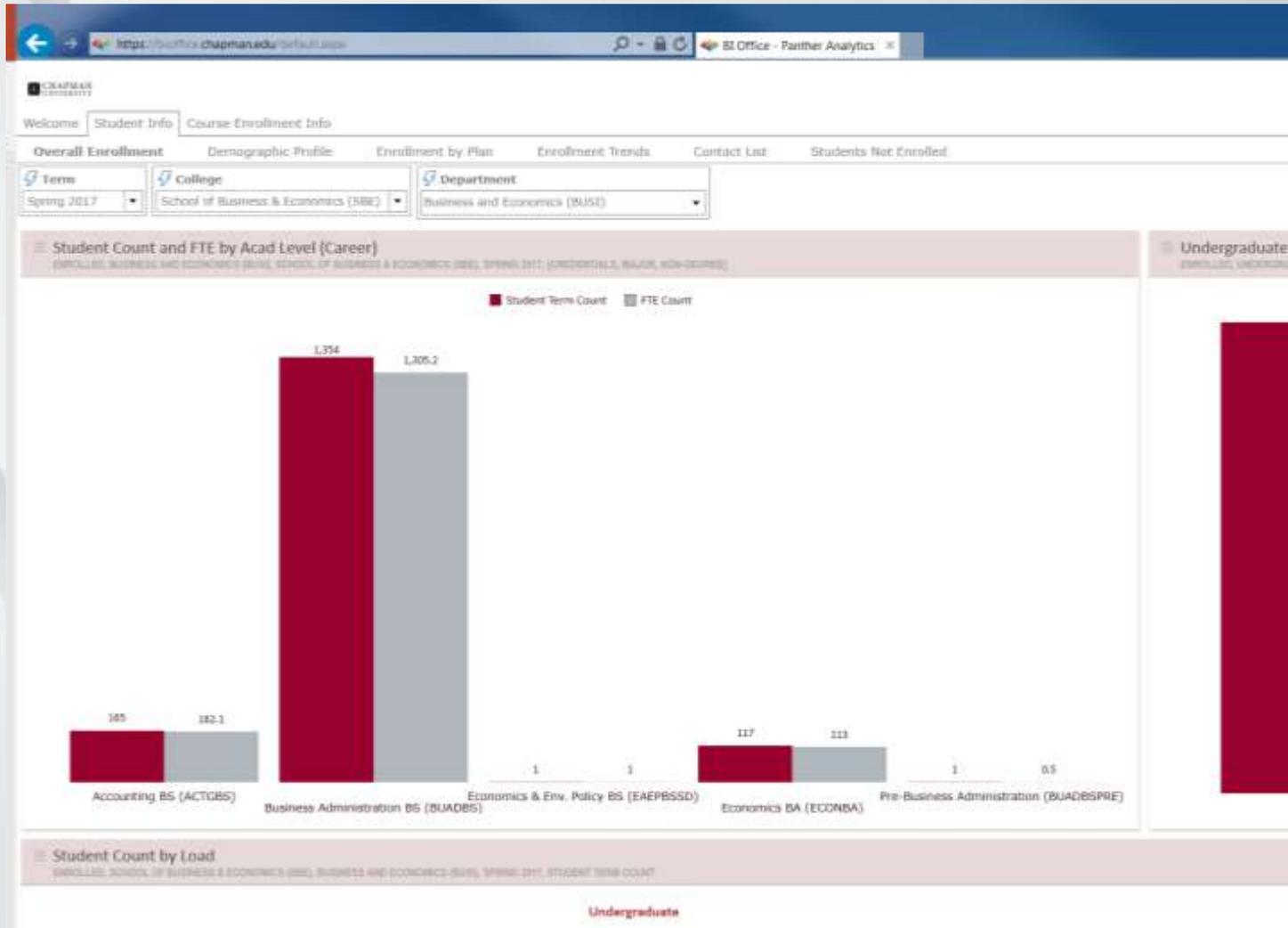
Practice 1: Drilling Down

- “Student Info” tab → “Overall Enrollment” link
- Select a term (e.g., spring 2018), a college and department in the slicers
 - Pick your favorite!
- Find the bar with the undergraduate student term count
- Now click on the bar....what happened?
- Try clicking again...what happened now?

Drill Down illustration for College SBE



After a few clicks.....



“Student Info” tab:

Questions to answer for Spring 18:

- What are the most popular minors in Dodge College?
 - What are the top 3 minors overall based on enrollment?
- What is the trend in enrollments in the Math and Computer Sciences majors overall?
 - Which of the majors in the group are growing the fastest?
- How diverse is Strategic and Corporate Communications major?
 - How is it changing over time?
- How many seniors are not enrolled this term at the College of Performing Arts?
 - Why?



Panther Analytics Quiz:

Part B: Data Management Terminology

- What is a “query” in a database or a system like PeopleSoft or Panther Analytics?
 - A request to obtain data
- What is a “filter” in a database or in MS Excel?
 - A way of restricting data to a subgroup of the data
- What is a “slicer”?
 - The same thing as a filter as mechanism of restricting the set of data being examined
- What does it mean to “drill down”?
 - Similar to a filter, drill into a subgroup of the data

Panther Analytics Quiz:

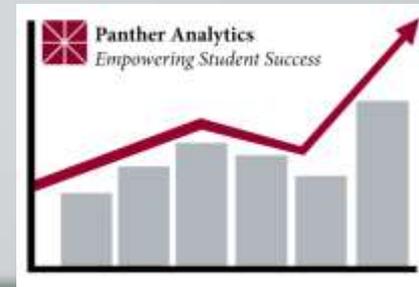
Part C: Data Terminology at Chapman

- What is the word we use for “school or college”?
 - Academic Group
- What is the word we use for “major” or a “minor”?
 - Plan
- What is the word we use for course “section”?
 - Class
- What is the word we use for level of a course (grad, undergrad, etc.,)?
 - Career
- What is the word we use for a cross listed course?
 - Combined



Panther Analytics Training Summary for Part 1

- This presentation introduced Panther Analytics, Chapman's BI System and the ongoing project supporting it
- We described good practices for handling sensitive data which will be available in Panther Analytics
- We logged in to Panther Analytics and began to navigate the system and obtain reports
 - Next session will practice our Hands-on skills
 - Looking forward to seeing you there!



Feedback/Comments?



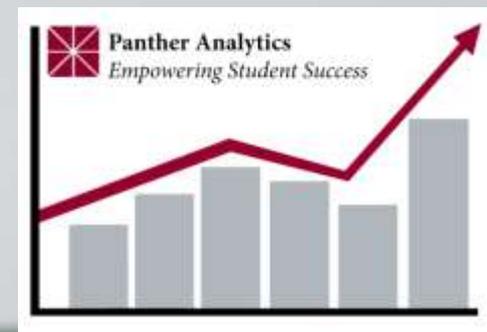
Introduction to Panther Analytics

Training Part 2 of 2

Ken Murphy

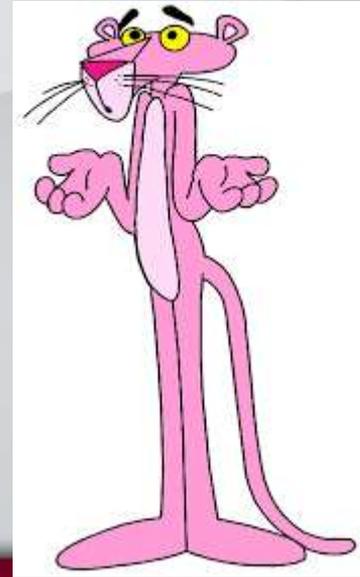
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Summer 2018



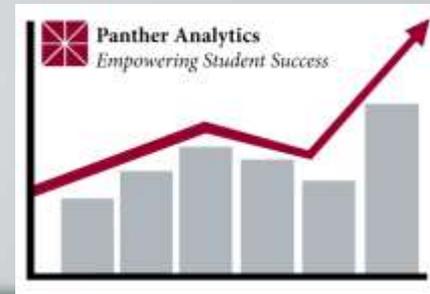
Panther Analytics Training: What and Why?

- A two part series on learning and using Panther Analytics
 - Part 1: Defining and Logging in to PA
 - **Part 2: Reporting using PA**
 - Drilling down (and up)
 - Obtaining lists of students
 - Using the other reporting features



Goals for this Session:

- Practice using Panther Analytics to obtain information
 - Drilling down and up to get precise information
 - Using “Cell Action List” to get lists of items, in particular student lists
 - Using other reporting features, e.g., “Interaction” and more
- Know where to obtain help
- Add you wish to our wish list!



Panther Analytics Landing Page

www.chapman.edu/pantheranalytics

The screenshot shows the Panther Analytics landing page on Chapman University's website. The page features a navigation menu with links for ABOUT, ACADEMICS, ADMISSION, ARTS, CAMPUS LIFE, RESEARCH, and SUPPORT. A breadcrumb trail indicates the user's location: Campus Services > Information Systems & Technology > Software > Panther Analytics.

Software

- Sligo for Business
- Dropbox
- WUv
- EndNote
- Mathematica
- SPSS
- ChemDraw
- Adobe Creative Cloud
- Full Everywhere
- Qualtrics
- Microsoft Office 365

Panther Analytics

Panther Analytics Empowering Student Success

Panther Analytics is the university's data warehouse, a business analysis tool acquired to give staff, faculty and administrators access to nearly up-to-date reports and data needed for day-to-day work-related activities, as well as for assessment, planning and informed decision making.

It provides easy, self-service access to well-designed reports containing up-to-date data within a few clicks. This highly sophisticated reporting tool will allow you to run reports that can identify key metrics such as enrollment counts and percentages with drill-down capabilities to identify specific colleges/school, department, course-level or student-level information.

What is Panther Analytics?

- Get up-to-date reports from anywhere
- Get results in minutes
- Self-programming
- Get reports in a way that works for you and other stakeholders
- Is easy to learn & use

This new tool can do the following

- Key Features
- What Type of Data Does it Contain?
- Scope of Project and Timeline
- Training Materials and other Resources

Login to Panther Analytics

Feedback

We'd love to hear from you! Let us know how we're doing by filling out our Feedback Form.

Need Assistance / Support?

Send us an email at pantheranalytics@chapman.edu or call (714) 961-6006.

Remember, for best results with PA....

- Use the Internet Explorer Browser....
- Yes, it does work on a MAC!

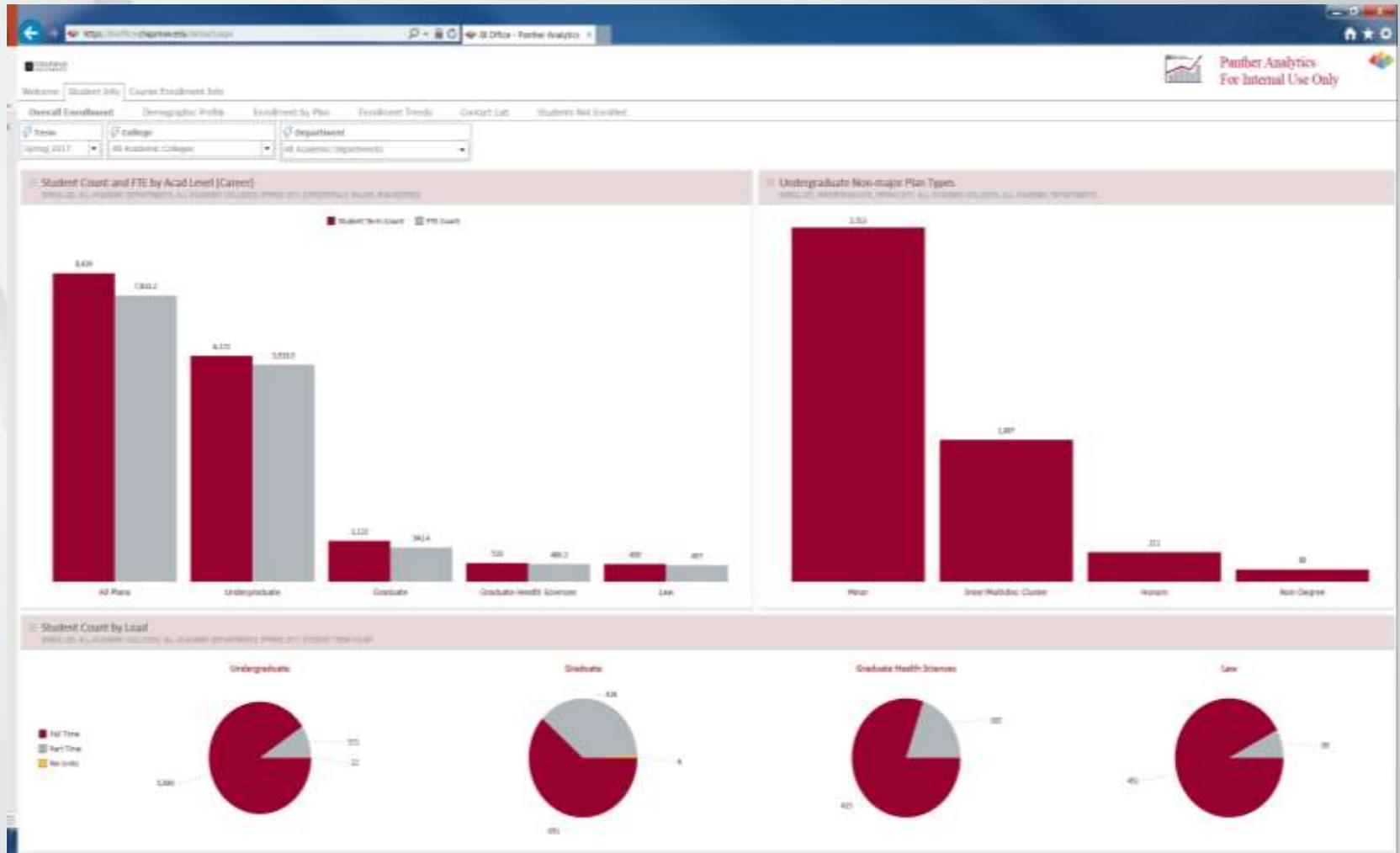


Logging into Panther Analytics

<https://biooffice.chapman.edu>

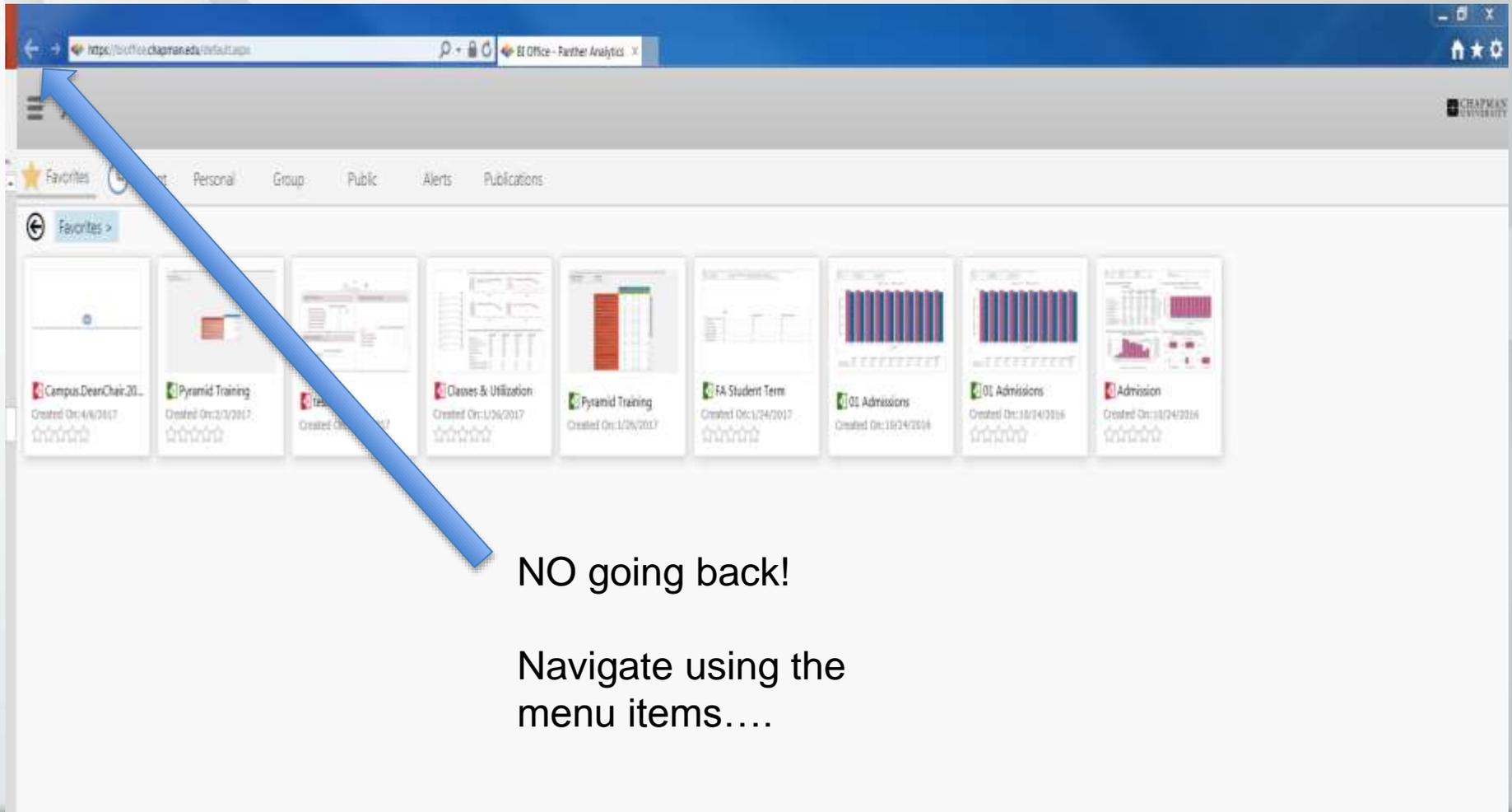


First Report: Enrollment Report



Panther Analytics

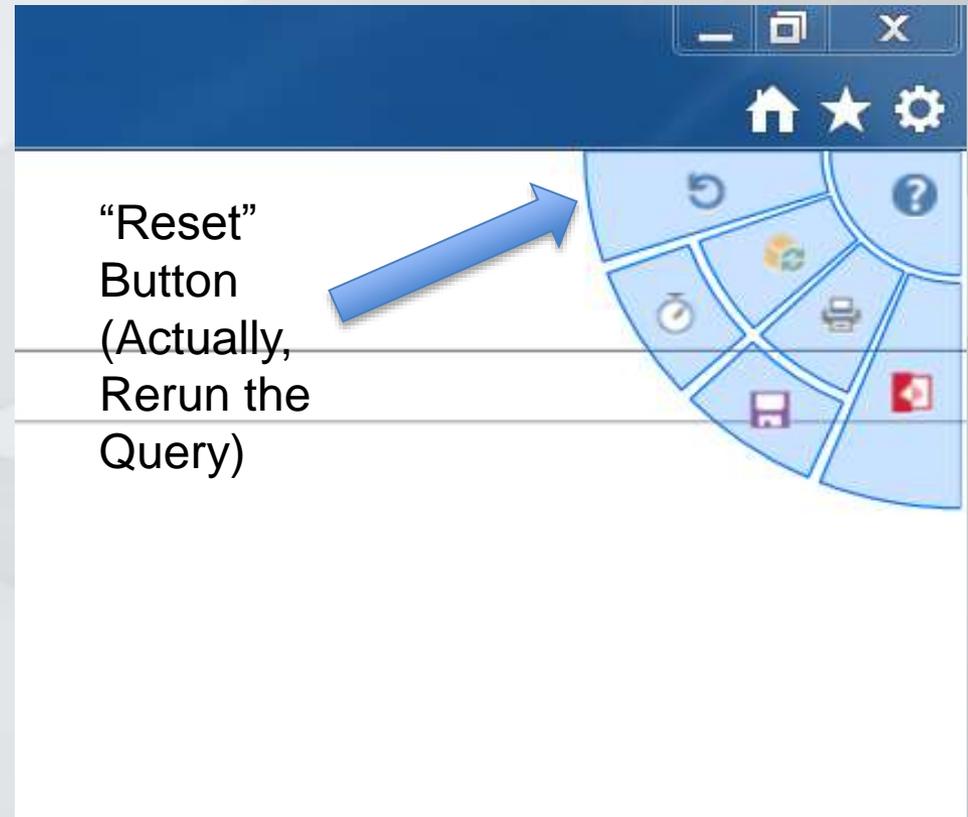
Rule #1: Don't Use the BACK button!

A screenshot of a web browser displaying a dashboard. The address bar shows the URL "https://office.chapman.edu/default.aspx". The browser's back button is highlighted with a blue arrow. The dashboard content includes a navigation menu with "Favorites", "Personal", "Group", "Public", "Alerts", and "Publications". Below the menu is a "Favorites" section with a grid of dashboard tiles. Each tile has a title and a "Created On" date. The tiles are: "Campus.DearsChair.20...", "Pyramid Training", "Classes & Utilization", "Pyramid Training", "FA Student Term", "Admissions", "Admissions", and "Admission".

NO going back!

Navigate using the menu items....

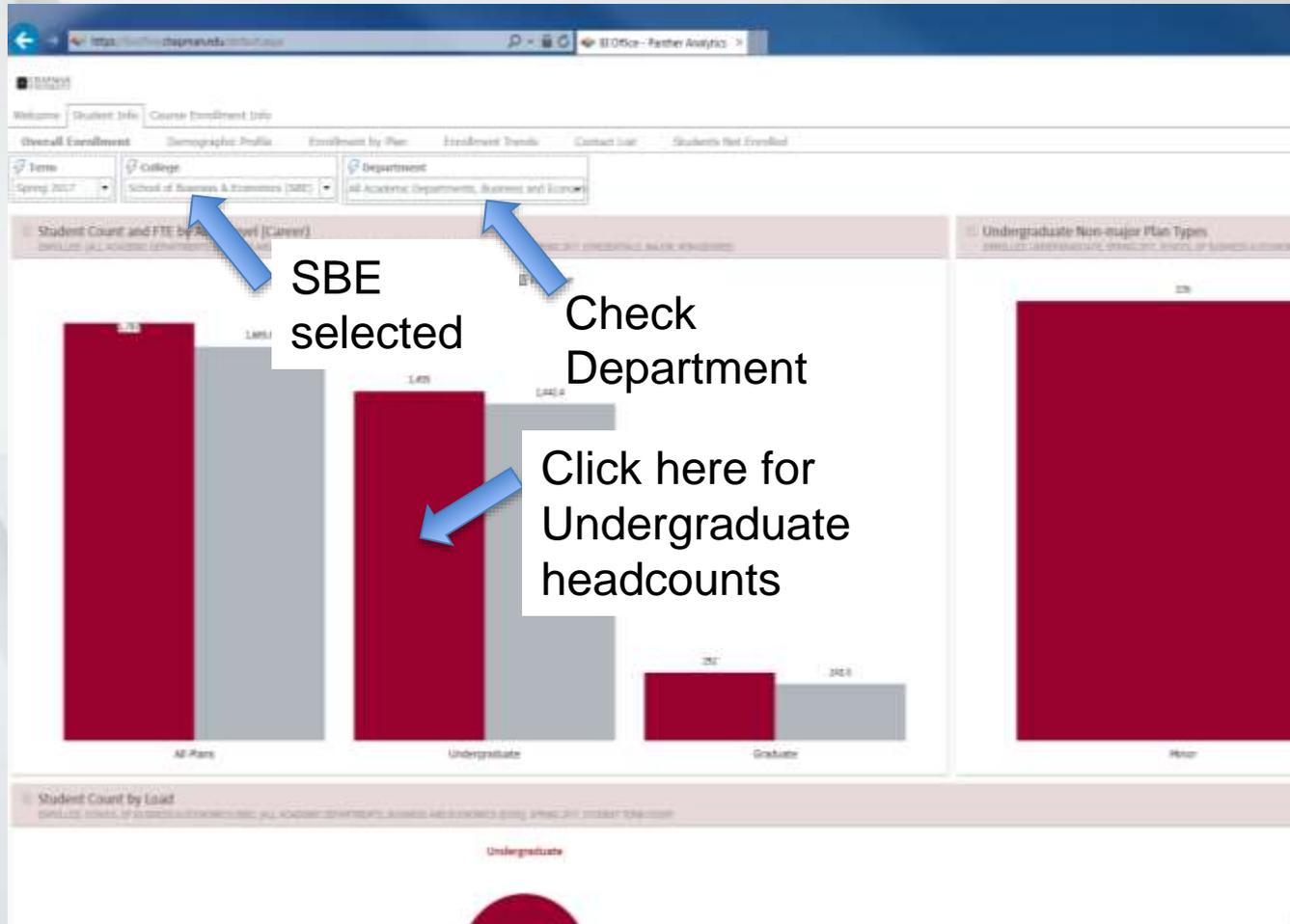
Key Feature and Rule #2, the “Reset Button”



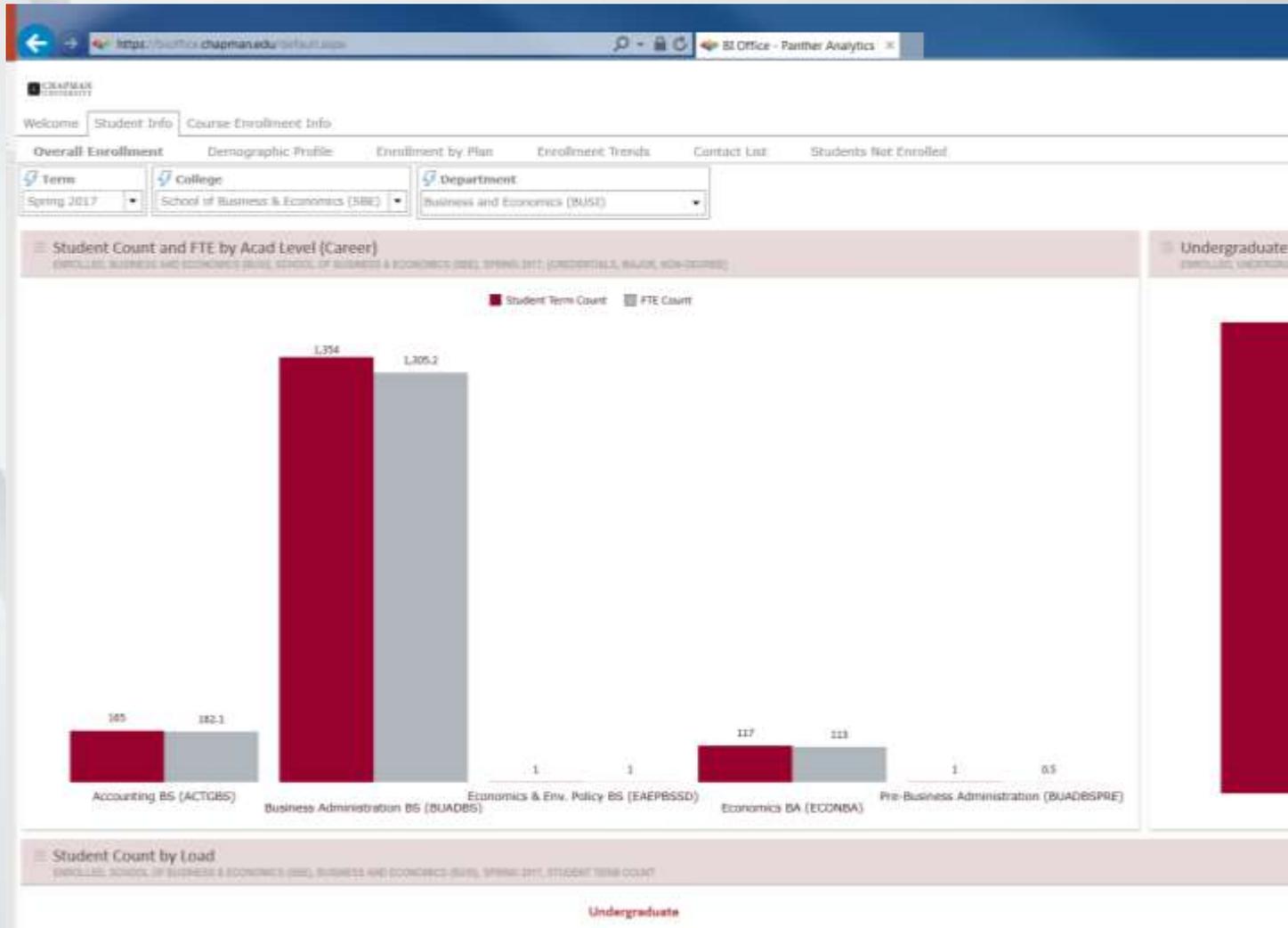
Practice 1: Drilling Down

- Student Data Tab → Overall Enrollment Link
- Select the current term (e.g., Spring 18), a college and department you are interested in
- Find the bar with the undergraduate student term count
- Now click on the bar....what happened?
- Try clicking again...what happened now?

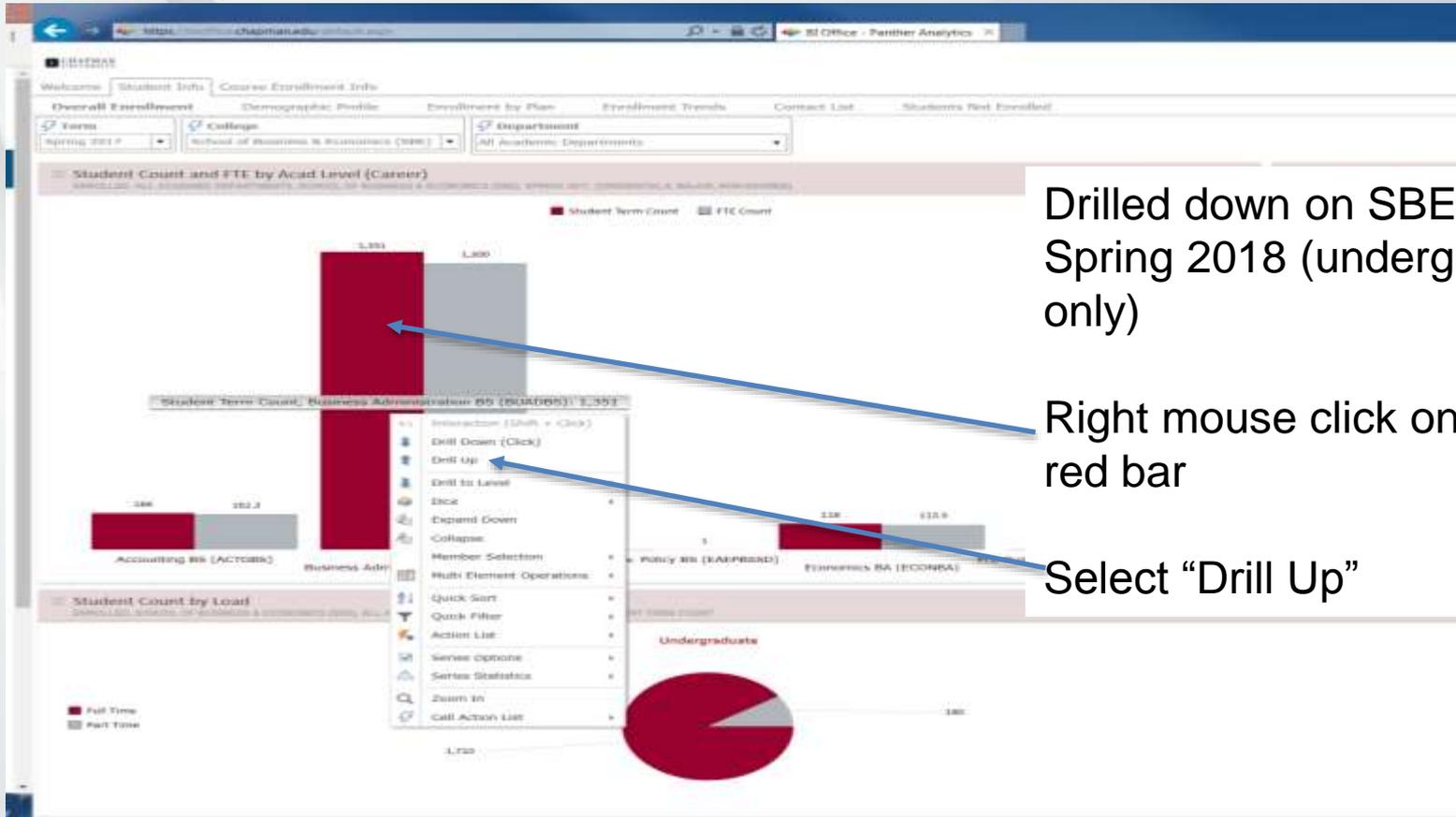
Drill Down illustration for College SBE



After a few clicks.....



Practice 1A: Drilling Up

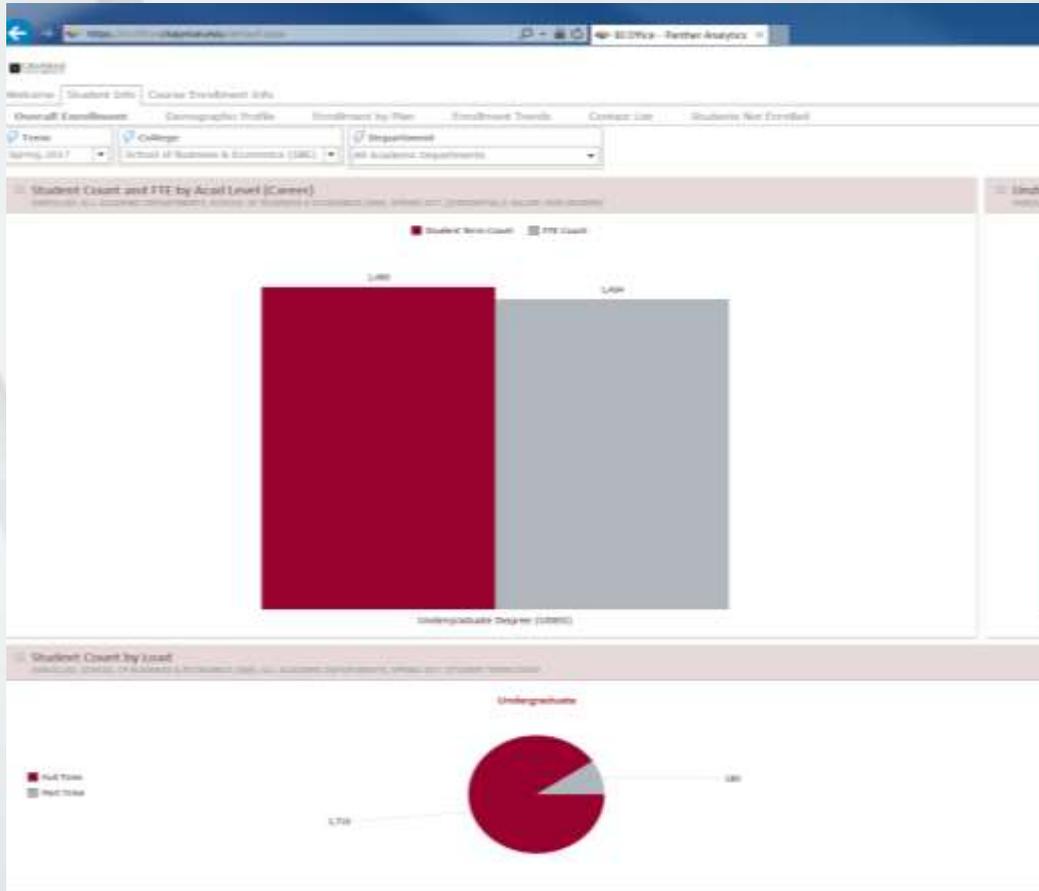


Drilled down on SBE in Spring 2018 (undergrad only)

Right mouse click on red bar

Select "Drill Up"

After drilling up.....



All majors in SBE undergrad program now combined into a single box

Note drilling up does not necessarily return you to where you started drilling down from.....

Don't forget that one can always use the "reset" button....

Practice 2: Obtaining a List of Students

- You've drilled down to the level of interest, now you want to get a list of those students....
- Right mouse click on a bar or a number
 - The icon should change slightly
- Choose “Cell Action List”
- Choose one of the “Student Term Drill” options
- And... what happens?

Practice 2 (con't): Obtaining a List of Students

- Go to Enrollment by Plan report
- Choose the current term, Schmid College, Chemistry department and majors
 - How many majors are there?
- Now right click on the senior Chemistry majors and select “Cell Action List”
 - What happens?

Current Majors in the Chemistry Dept.

Double majors are included in the counts for each of their majors below. The subtotals, however, count each student only once.

Career	Plan/Descriptor	Plan	Academic Level				Grand Totals
			Freshman	Sophomore	Junior	Senior	
		All Plans	25	22	17	30	98
Undergraduate	Chemistry	Sochemistry I5 (SOCHS)	1				1
		Sochemistry Molecular So BS (SOCHBS)	24	14	13	27	78
		Chemistry BS (CHEMS)	4	8	4	3	19

Right Click Here

Using Cell Action List

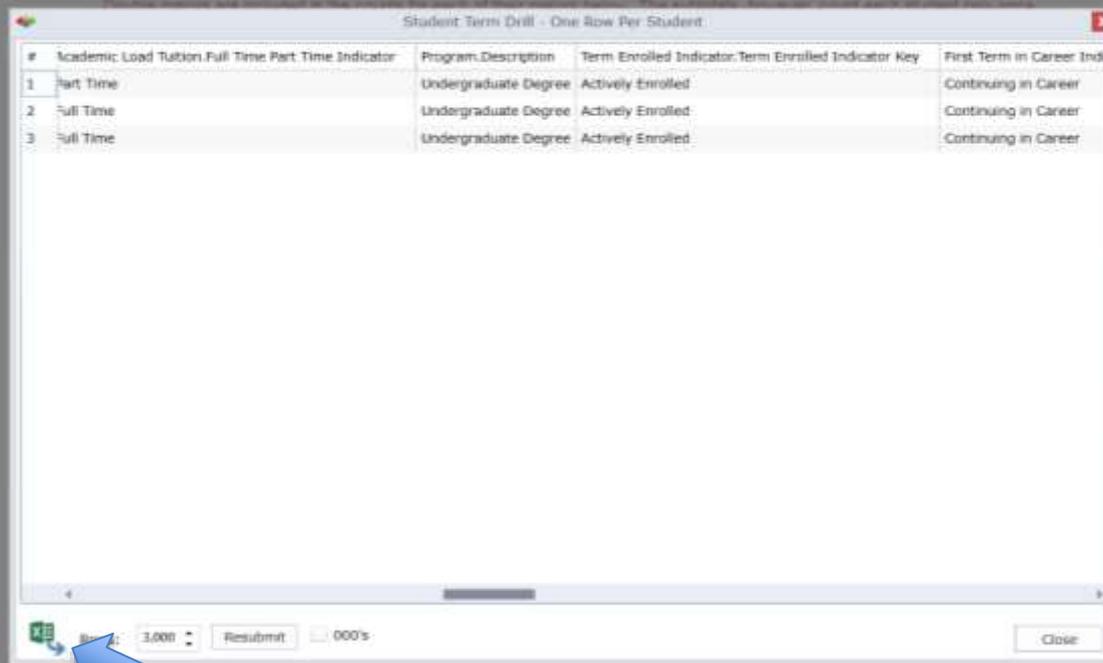
Academic Level					
	Freshman	Sophomore	Junior	Senior	Grand Totals
	29	22	17	30	98
	1				1
(MBBS)	24	14	13	27	78
	4	8	4	3	19

Context menu options:

- Zoom In
- Cell Action List
 - Student Term Drill - One Row Per Plan
 - Student Term Drill - One Row Per Student
 - Student Term Drill - Plan plus Additional Plan

Select This Option (try the others...)

Cell Action List → One Row per Student Results:



#	Academic Load	Tuition	Full Time	Part Time	Indicator	Program Description	Term Enrolled	Indicator	Term Enrolled	Indicator Key	First Term in Career	Indicator
1	Part Time					Undergraduate Degree	Actively Enrolled				Continuing in Career	
2	Full Time					Undergraduate Degree	Actively Enrolled				Continuing in Career	
3	Full Time					Undergraduate Degree	Actively Enrolled				Continuing in Career	

Convert to .csv
(Excel compatible)

Practice 3: Using the “Interaction” Feature

- You’re looking at the course enrollments and doing your best to manage wait lists
 - You’re in the “waitlist analysis” report, “course enrollment info” tab
 - Example uses “Spring 18”, “SBE”, “All Academic Departments”
- Note the waitlist total for MGSC 207, “Intro to Business Analytics”
 - Who are these students on the waitlist?

Waitlist Report, Spring 18, SBE

1. Select the term, college, and department.
 2. In the first report below, right click on the course title (NOT the class number). Then select "interactor". This will populate the live-level reports.

Class Number	Section	Section Status	Waitlist Size	Section Count	Prerequisite Count	Section Capacity	Waitlist Size (Last Update Refreshed)
ACCT 212	Intro to Financial Acg	Active (L)	0	6	257	215	0
ACCT 213	Intro to Managerial Accounting	Active (L)	0	7	333	307	30
BAE 211	Legal Environment of Business	Active (L)	0	6	334	308	3
BAE 475	Business Policies and Plan	Active (L)	0	6	336	319	19
ECEN 240	Principles of Microeconomics	Active (L)	3	11	374	307	0
ECEN 301	Principles of Macroeconomics	Active (L)	0	6	333	344	17
FIN 337	The Financial System	Active (L)	0	2	19	60	7
FIN 337	Financial Management	Active (L)	0	5	194	206	0
FIN 337	Intermediate Financial Mgmt	Active (L)	0	2	51	51	0
FIN 490	Special Topics in Finance	Active (L)	0	1	10	11	0
ISBMT 318	Management of Organizations	Active (L)	0	5	252	275	26
ISBMT 490	Special Topics in Management	Active (L)	0	2	52	67	20
MAIS 201	Intro to Business Analytics	Active (L)	27	11	391	310	11
MAIS 209	Intro Business Statistics	Active (L)	2	4	145	148	0
MAIS 301	Management Information Systems	Active (L)	1	5	135	179	24
MAIS 360	Manufacturing & Operational Mgmt	Active (L)	0	4	135	140	5

Waitlisted Sections by Course

Waitlisted Students by Course

Grid Area: The query contains no results.

Waitlisted numbers of students are here

Using the “Interaction” Feature

1. Select the term, college, and department.
2. In the first report below, right click on the course title (NOT the class number). Then select "Interaction". This will populate the two lower reports.

Course Number	Course	Section Status	Section Total	Section Count
ACTG 230	Intro to Financial Acctg	Active (A)	8	8
ACTG 231	Intro to Managerial Accounting	Active (A)	5	5
BAIS 215	Legal Environment of Business	Active (A)	2	2
BAIS 475	Business Psychology	Active (A)	2	2
ECOM 200	Principles of Microeconomics	Active (A)	5	5
ECOM 205	Principles of Macroeconomics	Active (A)	7	7
FIN 407	The Financial System	Active (A)	1	1
FIN 317	Financial Management	Active (A)	2	2
FIN 327	Intermediate Financial Mgmt	Active (A)	2	2
FIN 496	Special Topics in Finance	Active (A)	1	1
MGMT 318	Management of Organizations	Active (A)	5	5
MGMT 326	Special Topics in Management	Active (A)	1	1
MISC 207	Intro to Business	Active (A)	27	27
MISC 209	Intro Business	Active (A)	2	2
MISC 300	Management	Active (A)	3	3
MISC 346	Production & Operations	Active (A)	1	1

Right mouse click on the name of the class

Then select interaction

Interacting Report (con't)

Further Analytics For Internal Use Only

Alerts: Class Schedule, Class Schedule Overview, Waitlist Analysis

Term: Spring 2017 | College: School of Business & Accounting (SBA) | Department: All Academic Departments

1. Select the term, college, and department.
 2. In the first report below, right click on the course title (NOT the class number). Then select "Interactions". This will populate the two lower reports.

Class Number	Course	Section Status	Section Type	Section Count	Enrolled Total	Section Capacity	Open Seats (Not Open by System Override)
ABTS 210	ABTS in Financial Accounting	Active (S)	A	0	117	120	3
ABTS 211	ABTS in Managerial Accounting	Active (S)	A	0	117	120	3
BAE 210	Legal Environment of Business	Active (S)	A	0	124	120	4
BAE 211	Business Writing for Inter Bus	Active (S)	A	0	124	120	4
ISM 210	Principles of Information Systems	Active (S)	A	10	116	120	4
ISM 211	Principles of Information Systems	Active (S)	A	0	120	120	0
ISM 212	The Internet System	Active (S)	A	0	16	40	24
ISM 213	Application Management	Active (S)	A	0	124	120	4
ISM 214	Intermediate Financial Accounting	Active (S)	A	0	16	16	0
ISM 215	Special Topics in Finance	Active (S)	A	0	12	12	0
ISM 216	Management of Organizations	Active (S)	A	0	120	120	0
ISM 217	Special Topics in Management	Active (S)	A	0	12	12	0
ISM 218	Special Topics in Management	Active (S)	A	0	12	12	0
ISM 219	Special Topics in Management	Active (S)	A	0	12	12	0
ISM 220	Special Topics in Management	Active (S)	A	0	12	12	0
ISM 221	Special Topics in Management	Active (S)	A	0	12	12	0
ISM 222	Special Topics in Management	Active (S)	A	0	12	12	0
ISM 223	Special Topics in Management	Active (S)	A	0	12	12	0
ISM 224	Special Topics in Management	Active (S)	A	0	12	12	0
ISM 225	Special Topics in Management	Active (S)	A	0	12	12	0
ISM 226	Special Topics in Management	Active (S)	A	0	12	12	0
ISM 227	Special Topics in Management	Active (S)	A	0	12	12	0
ISM 228	Special Topics in Management	Active (S)	A	0	12	12	0
ISM 229	Special Topics in Management	Active (S)	A	0	12	12	0
ISM 230	Special Topics in Management	Active (S)	A	0	12	12	0

Waitlisted Sections by Course

Class Number	Waitlist Count	Waitlist
ABTS 210	18	12
ABTS 211	18	0
ABTS 212	27	0
ABTS 213	14	0
ABTS 214	18	0
ABTS 215	14	0
ABTS 216	14	0
ABTS 217	14	0
ABTS 218	14	0
ABTS 219	14	0
ABTS 220	14	0
ABTS 221	14	0
ABTS 222	14	0
ABTS 223	14	0
ABTS 224	14	0
ABTS 225	14	0
ABTS 226	14	0
ABTS 227	14	0
ABTS 228	14	0
ABTS 229	14	0
ABTS 230	14	0

Waitlisted Students by Course

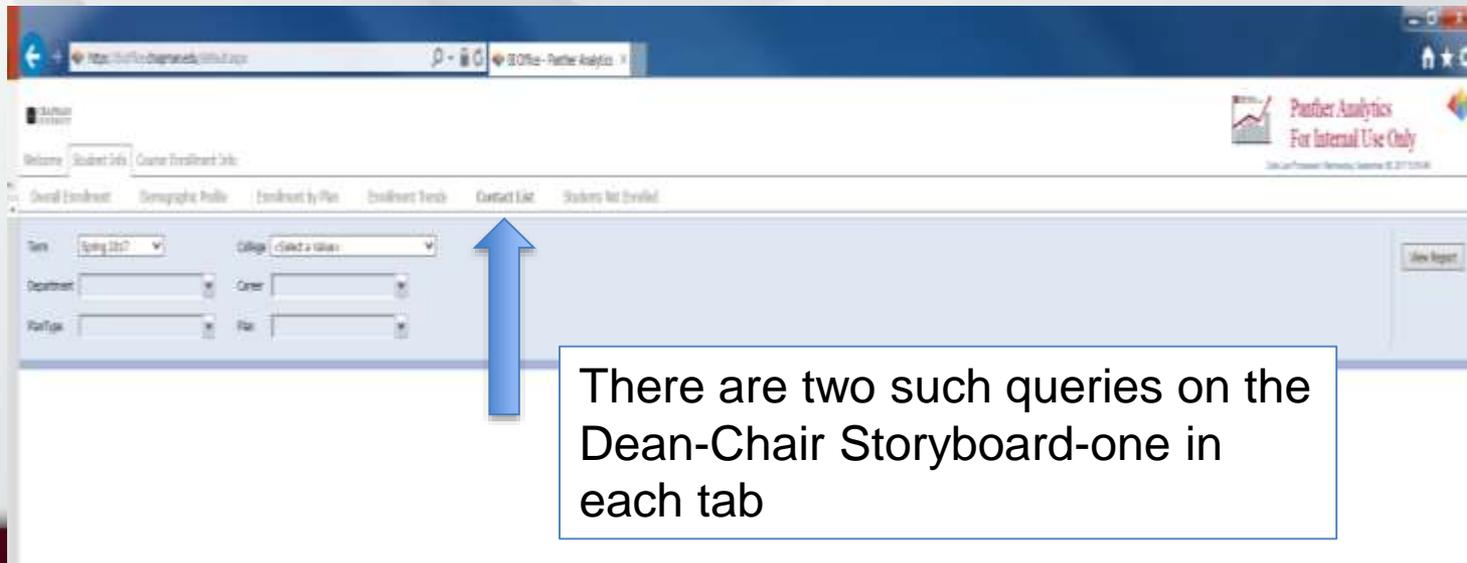
Section	Waitlist Count	Waitlist Count	Waitlist Count
Section 001 (2017181)	18	12	12
Section 002 (2017182)	18	0	0
Section 003 (2017183)	27	0	0
Section 004 (2017184)	14	0	0
Section 005 (2017185)	18	0	0
Section 006 (2017186)	14	0	0
Section 007 (2017187)	14	0	0
Section 008 (2017188)	14	0	0
Section 009 (2017189)	14	0	0
Section 010 (2017190)	14	0	0
Section 011 (2017191)	14	0	0
Section 012 (2017192)	14	0	0
Section 013 (2017193)	14	0	0
Section 014 (2017194)	14	0	0
Section 015 (2017195)	14	0	0
Section 016 (2017196)	14	0	0
Section 017 (2017197)	14	0	0
Section 018 (2017198)	14	0	0
Section 019 (2017199)	14	0	0
Section 020 (2017200)	14	0	0

Sections of the course and waitlists populate here

Practice 4:

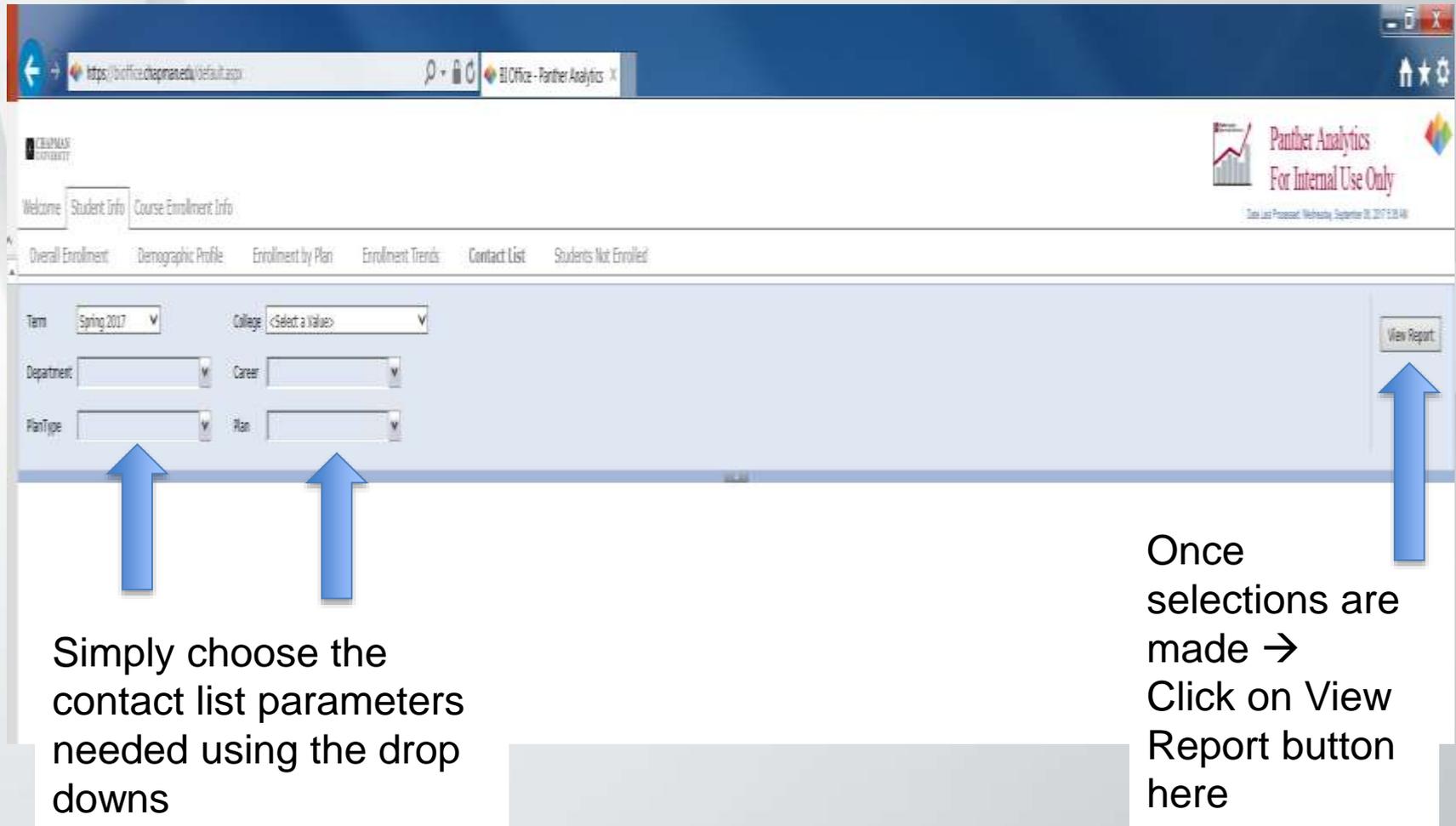
Using the SSRS Reports

- SSRS = SQL Server Reporting Services
 - This is a static query to the data warehouse for some information
 - These queries are fast and easy, but not as flexible



There are two such queries on the Dean-Chair Storyboard-one in each tab

Contact List Report



The screenshot shows a web browser window with the URL <https://bionline.chapman.edu/default.aspx>. The page title is "BI Office - Panther Analytics". The navigation menu includes "Overall Enrollment", "Demographic Profile", "Enrollment by Plan", "Enrollment Trends", "Contact List", and "Students Not Enrolled". The "Contact List" tab is active. The form contains several dropdown menus: "Term" (set to "Spring 2017"), "College" (set to "<Select a Value>"), "Department", "Career", "Plan Type", and "Plan". A "View Report" button is located on the right side of the form. Three blue arrows point to the "Term", "College", and "View Report" elements. A text box at the bottom left explains the purpose of the dropdowns, and another text box at the bottom right explains the purpose of the "View Report" button.

Simply choose the contact list parameters needed using the drop downs

Once selections are made → Click on View Report button here

Contact List Report

Overall Enrollment Demographic Profile Enrollment by Plan Enrollment Trends Contact List Students Not Enrolled

Term: Fall 2017 College: School of Business & Economics (SBE)
Department: Business and Economics (BUSI) Career: Undergraduate
Plan Type: MAJ Plan: Accounting BS (ACTGBS)

View Report

Student Contact List

Report Run Time: 9/6/2017 7:44:11 AM
Number of rows returned: 151
Term: Fall 2017
College: School of Business & Economics (SBE)
Department: BUSI
Career: UGRD
Plan Type: MAJ
Plan: ACTGBS

FERPA Hold	Student ID	Student	Last Name	First Name	College	Department	Career	Academic Lvl	Majors	Subplans	Minors	Clusters	Email	Admit Type	Start Term (Prog)	Term Status	Term Reg Cred	Expected Grad Term	AP G
------------	------------	---------	-----------	------------	---------	------------	--------	--------------	--------	----------	--------	----------	-------	------------	-------------------	-------------	---------------	--------------------	------

To save the report-use this button

Report meta-data is here

The report looks like this → there will be 151 rows of data below the headers shown above

Don't forget to treat the data as if it is a strategic asset! 😊

Time to Do your Homework!

- See if you can answer the business questions
 - 10 question handout
- If you get stuck raise your hand....someone will come to help
- We will discuss the answers in a few minutes

Need help?

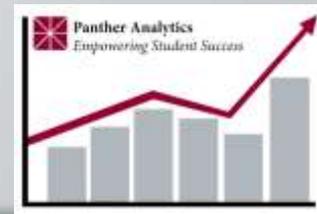
Want something new?

- Use the service desk!
 - Service Desk email is: servicedesk@chapman.edu
 - Service Desk phone is: x6600 or 714-997-6600
- Use Panther Analytics help directly
 - Email: pantheranalytics@chapman.edu
 - Phone: 714-516-5506
- Remember: We are all learning as we go!
 - We will do our best to address your queries as fast as possible-you should at least get an acknowledgement within 24 hours during the week

Panther Analytics Training

Part 2 Summary

- We all know how to login, navigate and find the different reports in Panther Analytics
- We practiced and discussed the results found from using Panther Analytics to answer business questions
- We discussed opportunities and issues with Panther Analytics
- We are aware of value of our data and the security issues
- We will abide by good data handling policies



Feedback/Comments?



Congratulations!

