Setting-Up and Using EIS

Crafton Hills College Office of Research and Planning Training Document for EIS (Executive Information System)

Working with EIS (Executive Information System)

The following document illustrates how the San Bernardino Community College District Executive Information System (EIS) can be used to inform decision-making and planning for enrollment management. Specifically, this document provides step-by-step instructions for how to access EIS for the first time, how to set-up EIS on the user's desktop, and how to customize EIS to provide information that is specific to a Division.

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Accessing EIS for the First Time

1. Click on the following link or copy and paste it into the URL window: http://csb-sharep-01/EIS/Pages/Default.aspx.

Or

Browse to the following link
- Go to the CHC ORP Web Site www.craftonhills.edu/research
- Click on EIS (Executive Information System - CHC Intranet Only)

2. Click on the Excel Icon to the left of the "EIS Excel Sections Workbook." Currently, this is the only workbook that the CHC ORP has worked with and that contains methodologically sound information that has been verified over time. The information from this workbook is what is used to generate three of the tables in planning and program review for each discipline.

3. After the workbook is clicked on, the following Excel spreadsheet will open. You can click on the worksheets listed in below to become familiar with what is available. However, the one that we will be working with is the labeled "Section Efficiency." Click on "Section Efficiency."

EIS Section Workbook - contains these worksheets with Section Data:

SectionCnts	Section counts by status, location and reporting year.
FTES by Term	FTES by division, dept and term.
CensusTotals	Census Totals (Enrollment, FTES) with Res/NonRes subtotals.
StuPerformance	Student Performance measures (grades) for program review.
Section Efficiency	Section efficiency measures for program review.
LoadCompare	Faculty load comparsion with section load.
AM Totals	Totals by accounting method.
Dictionary	Description of fields used in this section workbook
DivCodes	Division and Department Codes

EIS
Section
Workbook

To pick a worksheet in this workbook, click a tab along the bottom.
These worksheets are intended as starting points for your investigation.
If you'd like to see more detail about a category, such as a division:
Double click on the row name (for example, "VPE" in the "DivisionSec" column).
When the "Show Detail" box appears, pick a field like
"SubjectSec", "CourseNameSec" or "DeptSec" to select the type of detail you'd like to see.
One way to return to the original display is click "Edit" on the standard toolbar, then "Undo".

If you'd like to see more detail about a cell, within a table:
Double click on the cell. For example, double click on a section count, such as "6" sections.
A new worksheet showing detailed information about the sections is created.
This is called "drilling down".

If you'd like to change the categories you're viewing, you can "drag and drop".
For example, on the "FTES by Term" worksheet, to view by division instead of accounting method:
First position your cursor on "DivisionSec", then drag and drop it near "Accounting Method"
Wait for the table to be recalculated - this may take a couple minutes.
Similarly, you can drag "Accounting Method" from its position as a category
and drop it to the position where "DivisionSec" was.

Note the date each RptYr was last updated.
(RptYr 2001=Sections ending 7/1/00-6/30/01)

#Sections		Colleges	
RptYr	WareDate	C	V
2000	5/22/2002	1,730	4,097
2001	5/22/2002	1,661	3,874
2002	7/16/2002	1,643	3,796
2003	11/18/2002	1,550	3,596

To refresh: position cursor in table above,
Right Click: "Refresh Data"

Legend:
Total Student Contact Hours (TSCH) calculation depends on the section's accounting method:

DC	Daily Census	TSCH = CensusEnr * Contact Hours
DI	Daily Independent	TSCH = CensusEnr * Units * TLM
WI	Weekly Independent	TSCH = CensusEnr * Units * TLM
WK	Weekly Census	TSCH = CensusEnr * Contact Hours * TLM/DTL
PA	Positive Attendance	TSCH = Actual posted hours
		PA, if no hours posted: TSCH = Total Students * Contact Hours * PA Estimator (.85)
		CensusEnr, before census date, estimated using current enrollment.

FTES = TSCH/525   WSCH (Weekly Student Contact Hours) = TSCH / TLM
District Term Length (DTL) = 18   Term Length Multiplier (TLM) = 17.5

Contents / SectionCnts / FTES by Term / CensusTotals / StuPerformance / SectionEfficiency / LoadCompare / AM Totals / Dictionary / Codes

4. After clicking on "Section Efficiency" the following worksheet opens. The information in this worksheet is old and not current until you refresh it. You will need to refresh the information every time you open the worksheet.

Section Efficiency

Census subtotals for Resident/Non-Resident students are shown on "CensusTotals" worksheet.
"LoadCompare" worksheet compares FacLoad with SecLoad.

CollegeSec	V
LocationSec	(All)
RptYear	(All)
RptEstimate	(All)
TermSec	2001FA
Accounting	(All)
StatusSec	(All)

Report year depends on Section's End Date,
Census Totals (Enrollment, FTES) estimated until census date or PA posted
If section ended, "EnrActive" is final enrollment.
PA sections do not have a true Census Date, exclude from %Retention?
Made Sections = Status "A" or "P"

DIV	DeptSec	#Sec	Units	Cap	EnrBeg	EnrMax	EnrCenTot	EnrActiv	FtesTotal	WSCH	FacLoad	WSch/FacLc	%Retent
VADM		7	8.0	195	97	118	103	95	4.15	125	0.67	185.84	92%
VBUS		135	374.0	4,161	3,412	3,951	3,569	2,901	406.81	12,204	26.46	461.23	81%
VCMJ		58	157.7	3,695	3,031	3,062	3,044	3,023	226.47	6,794	14.23	477.45	99%
VHEA		90	274.3	2,775	2,261	2,465	2,311	2,046	318.69	9,561	31.92	299.52	89%
VHUM		313	1,021.5	8,735	7,874	9,120	8,112	6,306	1,026.67	30,800	69.89	440.70	78%
VLRS		50	45.0	2,024	1,008	1,158	1,086	934	47.40	1,422	2.22	640.51	86%
VPE		99	152.0	3,675	2,425	3,043	2,801	2,226	339.29	10,179	17.53	580.64	79%
VSCI		345	1,059.5	9,211	7,495	8,627	7,568	5,552	987.80	29,634	61.65	480.68	73%
VSOC		179	526.0	5,978	5,350	6,092	5,503	4,374	549.56	16,487	30.67	537.56	79%
VTEC		166	564.5	2,853	1,840	2,355	2,242	1,982	402.17	12,065	31.79	379.53	88%
VWRK		82	234.0	1,150	340	401	346	234	37.50	1,125	2.77	406.14	
Grand Total		1524	4,416.5	44,452	35,133	40,392	36,685	29,673	4,346.50	130,395	289.8	449.95	81%

5. To refresh the information in the worksheet so that it is current as of yesterday evening, right mouse click on the bottom right cell (i.e. 81%), and click refresh.
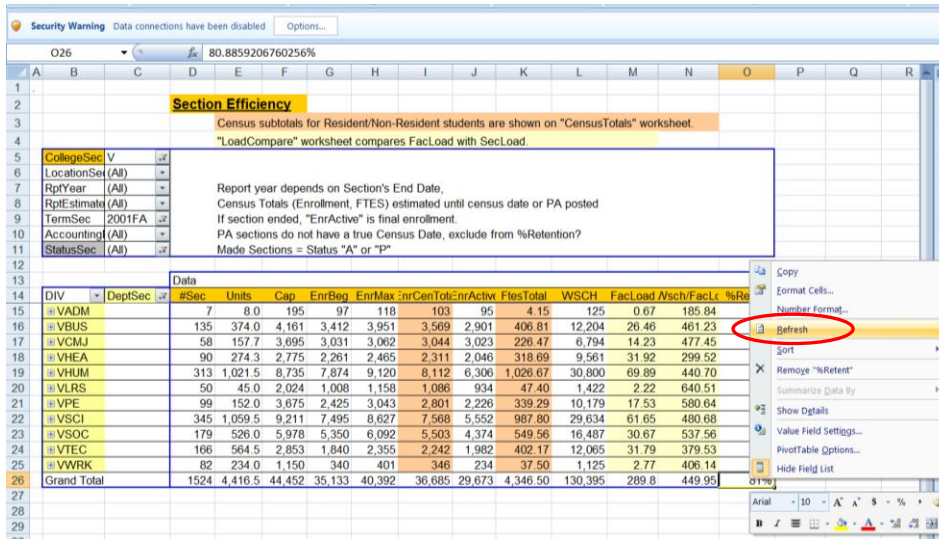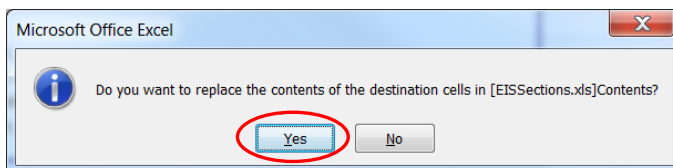

6. After clicking on "refresh" the following security notice comes up, click OK.
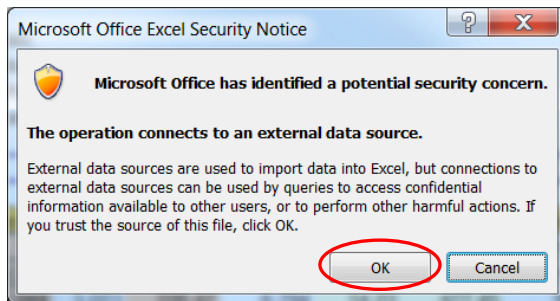
"Oh no, what will I do now?"

7. The next window will ask if you want to replace the contents of the destination cells, click "Yes."

Setting-Up EIS

1. Under "CollegeSec" choose "C" for Crafton

2. Under "StatusSec" make sure that only active ("A") sections are chosen and de-select cancelled ("C"), pending ("P"), and sections on ("H"). There may be reasons to include cancelled, pending, or sections that are on hold, depending on what you are doing. You can always go back and check these again.

3. In the Pivot Table Field List remove DIV and DeptSec from Row Labels (Click on and drag into the "Choose fields to add to report" window.)

Click on and drag to the "Choose fields to add to report" Window
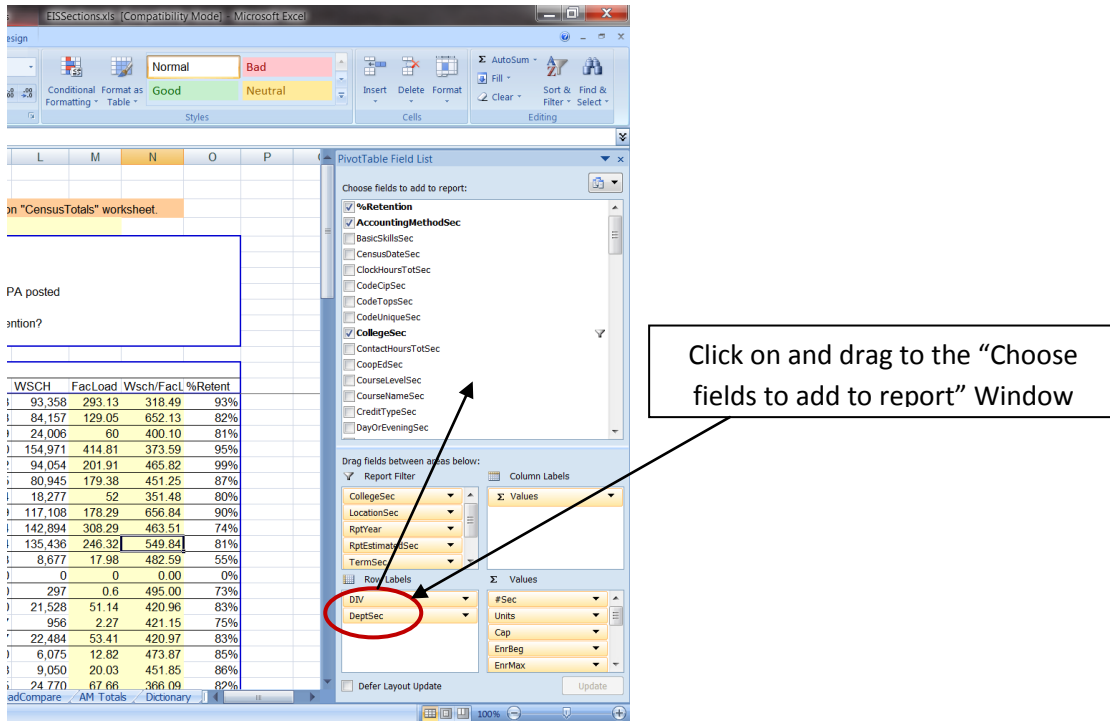
4. From the "Choose fields to add to report" window click on and drag TermSec to Row Labels
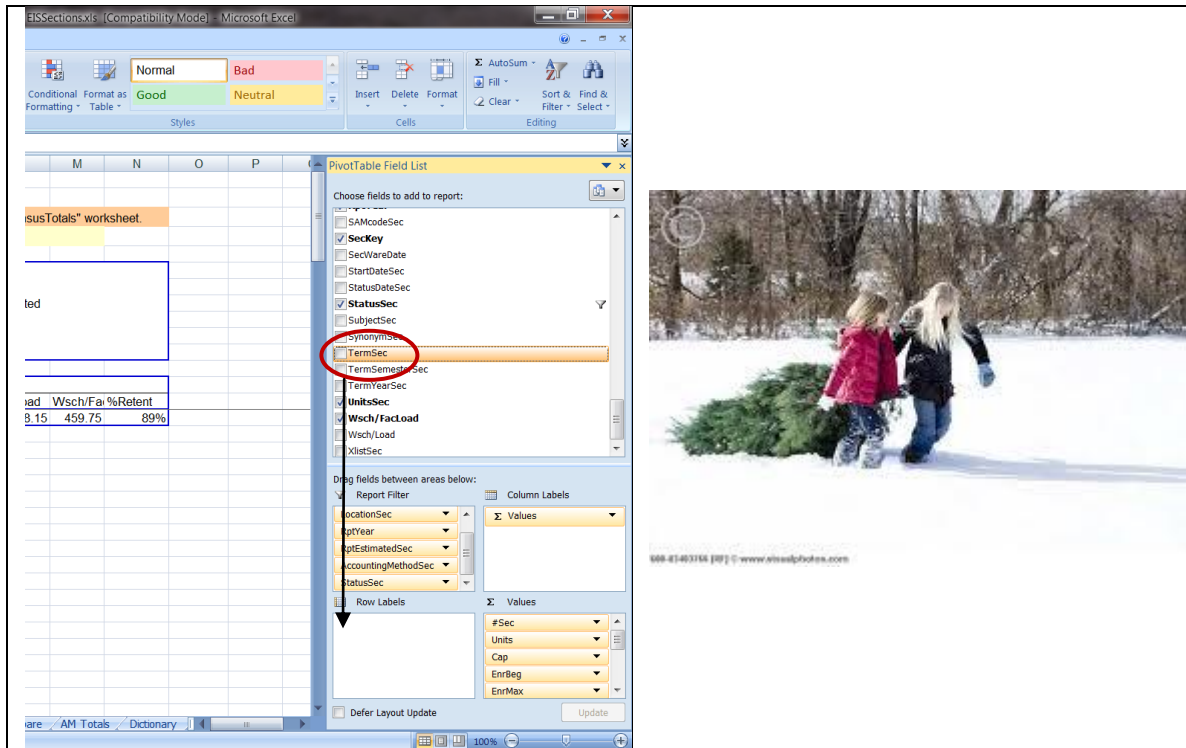
5. From the "Choose fields to add to report" window find TermSemesterSec and TermYearSec and drag each field into the "Report Filter" window.

6. Under TermSemesterSec on the left choose the appropriate term: FA for fall, SM for summer, or SP for spring. In this case FA for Fall.

7. Click on TermYearSec on the left select multiple terms and deselect all of the WF, PC, and CS terms.
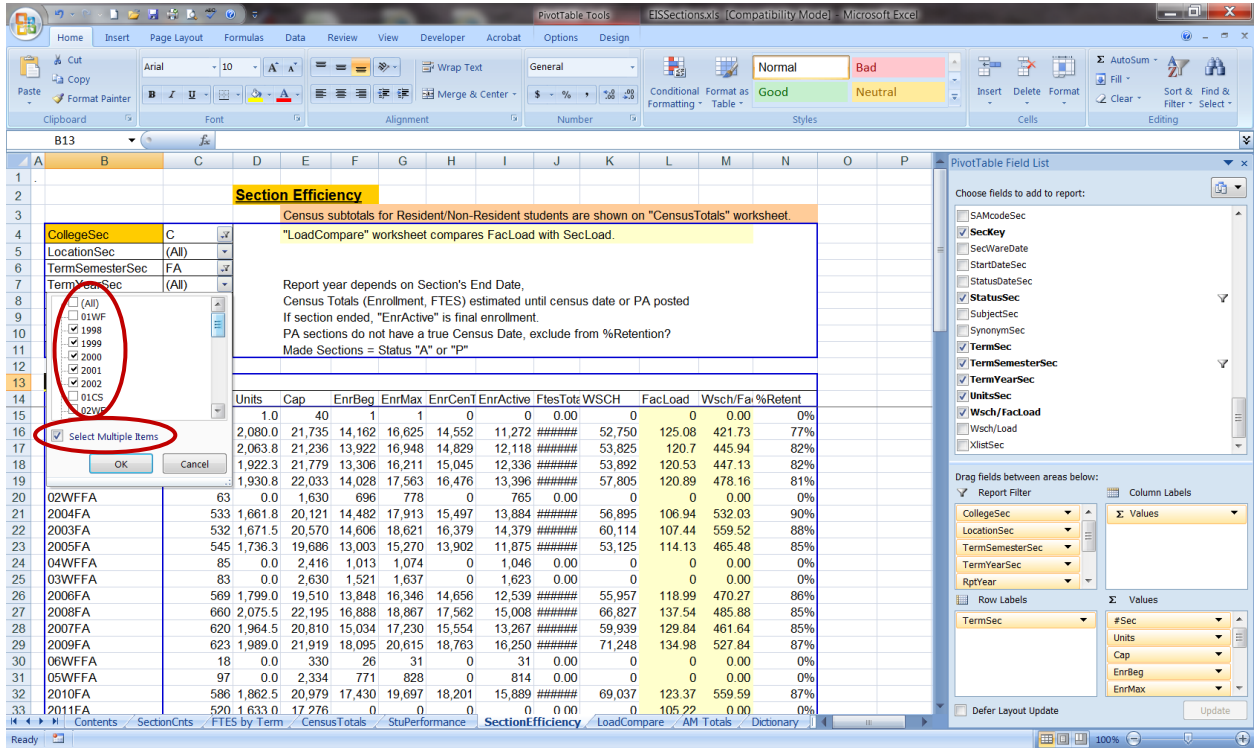

8. You are left with the enrollment section information for the current and prior fall semesters (see below).
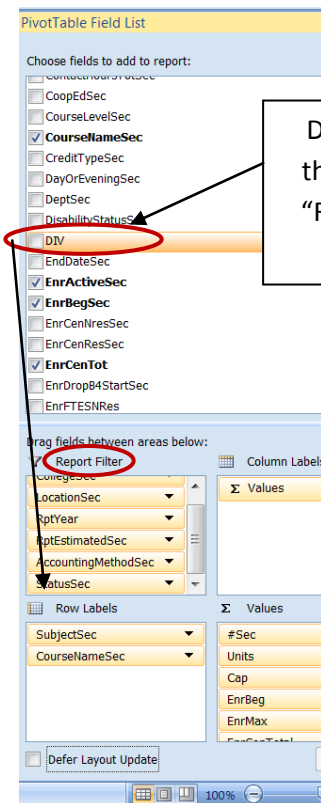
CollegeSec	C		"LoadCompare" worksheet compares FacLoad with SecLoad.									
LocationSec	(All)											
RptYear	(All)											
RptEstimatedSec	(All)		Report year depends on Section's End Date,									
AccountingMethodSe	(All)		Census Totals (Enrollment, FTES) estimated until census date or PA posted									
StatusSec	(All)		If section ended, "EnrActive" is final enrollment.									
TermSemesterSec	FA		PA sections do not have a true Census Date, exclude from %Retention?									
TermYearSec	(All)		Made Sections = Status "A" or "P"									
	Data											
TermSec	#Sec	Units	Cap	EnrBeg	EnrMax	EnrCenT	EnrActive	FtesTotal	WSCH	FacLoad	Wsch/Fa	%Retent
1999FA	721	2,080.0	21,735	14,162	16,625	14,552	11,272	1,758.32	52,750	125.08	421.73	77%
2000FA	723	2,063.8	21,236	13,922	16,948	14,829	12,118	1,794.18	53,825	120.7	445.94	82%
2001FA	660	1,922.3	21,779	13,306	16,211	15,045	12,336	1,796.41	53,892	120.53	447.13	82%
2002FA	639	1,930.8	22,033	14,028	17,563	16,476	13,396	1,926.83	57,805	120.89	478.16	81%
2003FA	532	1,671.5	20,570	14,606	18,621	16,379	14,379	2,003.81	60,114	107.44	559.52	88%
2004FA	533	1,661.8	20,121	14,482	17,913	15,497	13,884	1,896.51	56,895	106.94	532.03	90%
2005FA	545	1,736.3	19,686	13,003	15,270	13,902	11,875	1,770.85	53,125	114.13	465.48	85%
2006FA	569	1,799.0	19,510	13,848	16,346	14,656	12,539	1,865.24	55,957	118.99	470.27	86%
2007FA	620	1,964.5	20,810	15,034	17,230	15,554	13,267	1,997.97	59,939	129.84	461.64	85%
2008FA	660	2,075.5	22,195	16,888	18,867	17,562	15,008	2,227.58	66,827	137.54	485.88	85%
2009FA	623	1,989.0	21,919	18,095	20,615	18,763	16,250	2,374.92	71,248	134.98	527.84	87%
2010FA	587	1,863.5	21,012	17,463	19,733	18,237	15,923	2,305.91	69,177	123.44	560.41	87%
2011FA	542	1,714.0	19,078	15,549	17,962	16,587	14,818	2,027.49	60,825	112.76	539.42	89%
2012FA	551	1,739.0	19,229	0	0	0	0	0.00	0	109.35	0.00	0%
Grand Total	8505	26,210.8	290,913	194,386	229,904	208,039	177,065	25,746.02	772,381	1682.61	459.04	85%

9. Save this on your Desktop by clicking on the save icon, or by clicking File and Save. In the future you do not have to set this up again. All you need to do is to refresh it each time you open the file. You can work from this file now to set-up the same file for spring and summer.
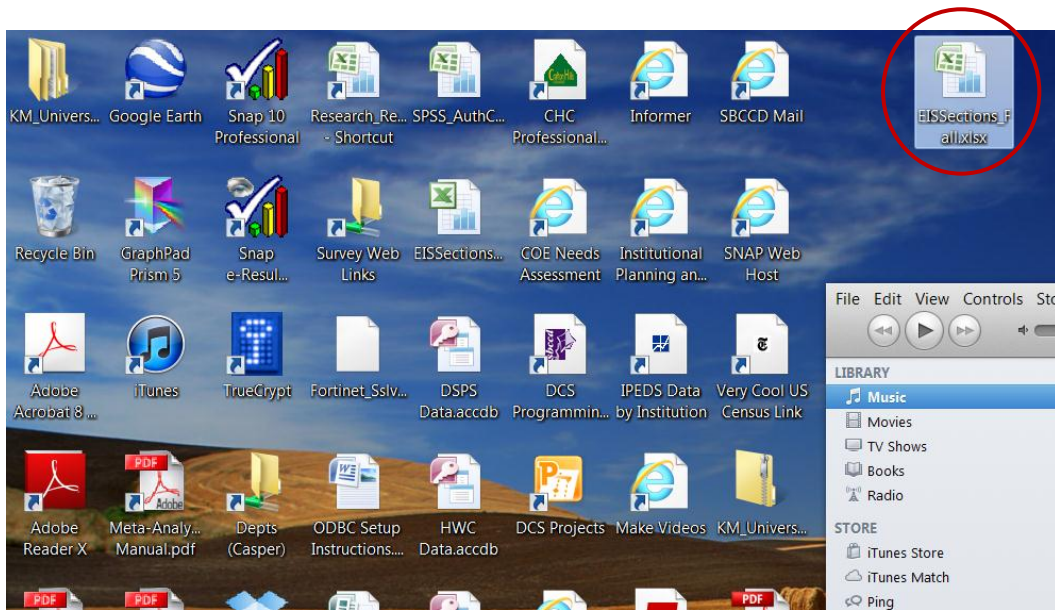
What if I want to look at the section information for courses in my Division only?

1. As an illustration, the Math, English, Reading, and Instructional Support will be used to illustrate how to set-up the section information for a specific division. First, drag the "DIV" field from the "Choose fields to add to report" window to the "Report Filter" window.

When you are done it will look like the following:

Drag "DIV" so that it is in the "Report Filter" window.
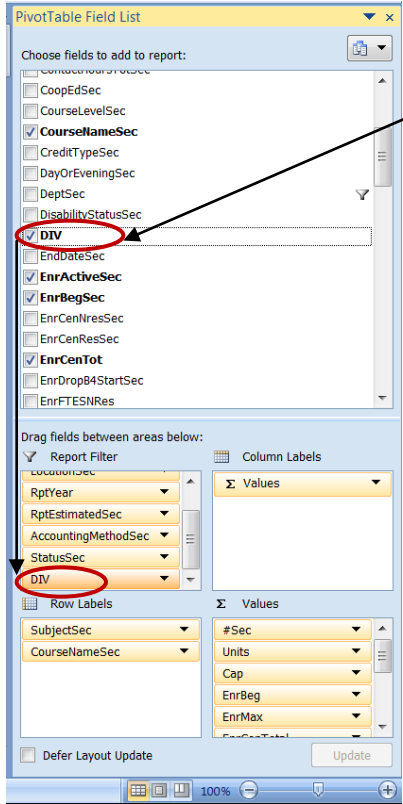
Drag "DIV" so that it is in the "Report Filter" window.

2. Next, click on "DIV," click on "Select Multiple Items," and choose the departments in your division. For the MERIS division choose CENRG for English and Reading, CMATH for math, and CTTRC for CHC and Library courses.

3. It is most likely that we are not interested in looking at this information for all of the fall semesters, and are probably interested in the current term only. However, you can play around with the views and move variables around. **You cannot mess up any of the data**.

   Accordingly, let's remove the "TermSemesterSec" and "TermYearSec" fields from the "Report Filter" window by dragging them into the "Choose fields to add to report" window.

   Next, let's drag the "TermSec" field from the "Row Labels" window to the "Report Filter" window. Finally, drag the "CourseNameSec" into the "Row Labels" window and "SubjectSec" from the "Choose fields to add to report" window to the "Row Labels" window. Make sure that "SubjectSec is above "CourseNameSec."

"Please, not more dragging."
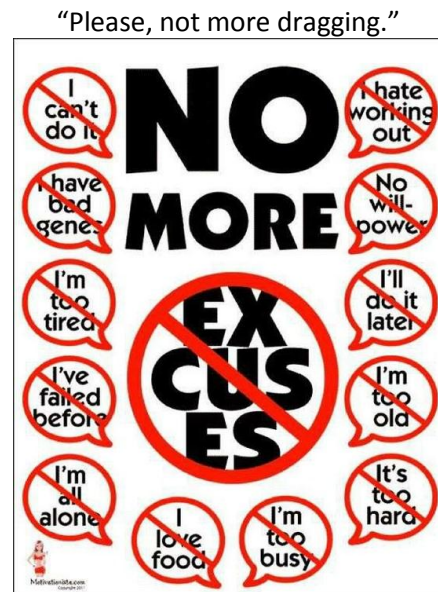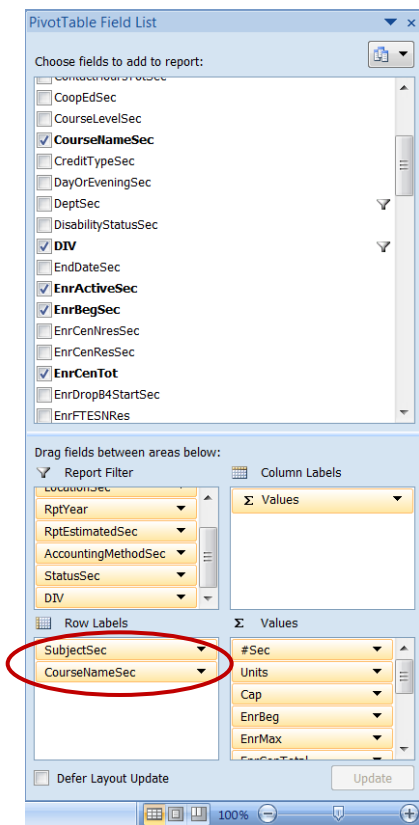
4. Now you can look at the number of active sections, enrollments, FTES, and WSCH/FacLoad ratio for the courses in your division. In addition, you can also add the "SynonymSec" field to the "Row Labels" window to examine enrollments by section.

SubjectSec	CourseName	Data #Sec	Units	Cap	EnrBeg	EnrMax	EnrCenTot	EnrActive	FtesTotal	WSCH	FacLoad	Wsch/FacL	%Retent
⊟CHC	CHC-090X4	1	2.0	25	24	26	25	24	1.55	46	0.13	357.14	96%
	CHC-099X4	6	6.0	165	160	188	176	165	5.87	176	0.42	419.05	94%
	CHC-100	1	3.0	25	24	30	25	20	2.50	75	0.2	375.00	80%
CHC Total		8	11.0	215	208	244	226	209	9.91	297	0.75	396.57	92%
⊟ENGL	ENGL-015	15	60.0	375	384	429	399	338	53.20	1,596	4.05	394.07	85%
	ENGL-101	24	96.0	594	606	664	621	525	82.80	2,484	6.48	383.33	85%
	ENGL-101H	4	16.0	8	2	3	2	2	0.27	8	0	0.00	100%
	ENGL-102	12	48.0	300	314	356	324	289	43.20	1,296	3.24	400.00	89%
	ENGL-102H	2	8.0	5	5	5	5	5	0.67	20	0	0.00	100%
	ENGL-109	1	3.0	65	22	22	20	19	2.00	60	0	0.00	95%
	ENGL-127X4	1	3.0	30	12	18	17	17	5.10	153	0.43	355.81	100%
	ENGL-152	2	8.0	50	48	55	50	36	6.67	200	0.54	370.37	72%
	ENGL-155	1	3.0	25	22	23	15	15	1.43	43	0.2	214.29	100%
	ENGL-155H	1	3.0	5	2	2	2	2	0.19	6	0	0.00	100%
	ENGL-232	1	3.0	30	31	32	31	30	3.10	93	0.2	465.00	97%
	ENGL-250	1	3.0	30	29	31	26	25	2.60	78	0.2	390.00	96%
	ENGL-261	1	3.0	30	26	26	17	15	1.62	49	0.2	242.86	88%
	ENGL-914	7	28.0	175	174	190	183	152	27.52	825	1.89	436.75	83%
ENGL Total		73	285.0	1,722	1,677	1,856	1,712	1,470	230.35	6,911	17.43	396.48	86%
⊟LRC	LRC-900X4	7	0.0	7,000	1,186	1,205	1,191	1,173	0.00	0	0	0.00	98%
	LRC-907	1	0.5	75	19	45	28	40	1.97	59	0.07	845.71	143%
	LRC-920	1	2.0	25	6	8	6	4	0.40	12	0.13	92.31	67%
	LRC-925X4	2	1.5	130	15	21	16	17	1.32	40	0.21	188.21	106%
	LRC-960X4	2	2.0	60	34	42	42	38	4.34	130	0.28	464.76	90%
LRC Total		13	6.0	7,290	1,260	1,321	1,283	1,272	8.03	241	0.69	349.07	99%
⊟MATH	MATH-090	10	40.0	340	357	398	373	302	51.34	1,540	2.7	570.47	81%
	MATH-090B	1	1.5	35	19	19	18	18	1.12	34	0.12	280.29	100%
	MATH-090C	1	1.0	35	16	19	16	18	0.98	29	0.1	292.57	113%
	MATH-095	15	60.0	520	533	616	581	463	80.51	2,415	4.05	596.35	80%
	MATH-095B	1	1.5	35	16	16	14	14	1.57	47	0.14	337.30	100%
	MATH-095C	1	1.5	35	14	15	15	15	1.51	45	0.14	323.81	100%
	MATH-102	8	32.0	260	278	323	292	238	38.75	1,163	2.16	538.20	82%
	MATH-103	3	12.0	105	105	127	117	78	15.60	468	0.81	577.78	67%
	MATH-108	3	12.0	125	92	117	111	101	14.80	444	0.27	1644.44	91%
	MATH-115	1	3.0	35	36	40	38	36	3.80	114	0.2	570.00	95%
	MATH-160	2	8.0	70	51	55	51	46	6.80	204	0.54	377.78	90%
	MATH-250	2	8.0	70	58	62	61	49	8.13	244	0.54	451.85	80%
	MATH-251	2	8.0	70	43	46	44	34	5.87	176	0.54	325.93	77%

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5. Remember that you can save the excel spreadsheet on your desktop and open it at any time. All you need to do is refresh it each time you open it.

Tips and Tricks

Selecting Cases that Can Also be Viewed

If the user wants to select records in the Report Filter and also be able to view them at the same time, the user will need to first move the field to the "Report Filter" window, select the types of records that the user wants to view, and move the records back to either the Row or Column Labels window.
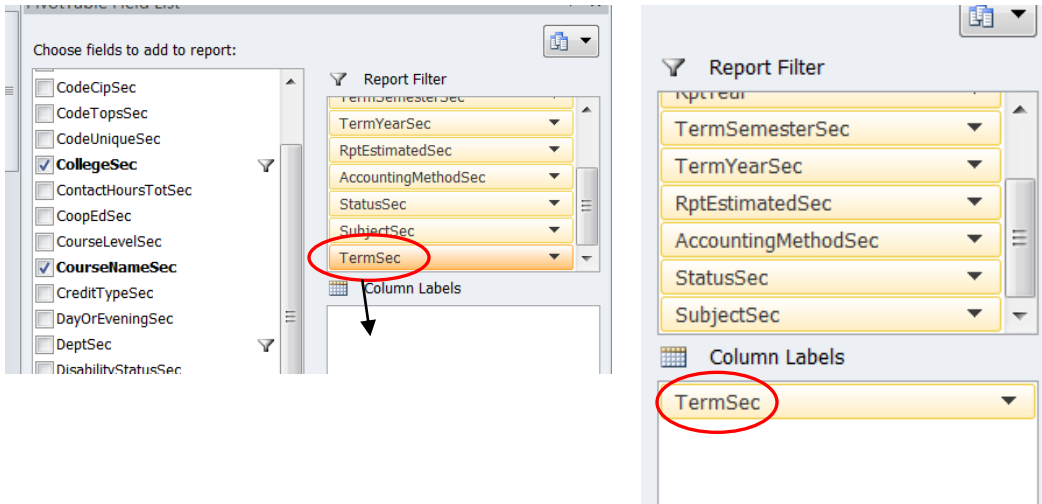
1. What if the user wanted to see both the Fall 2011 and Fall 2012 terms in the Columns window? First drag the "TermSec" field into the Report Filter window.
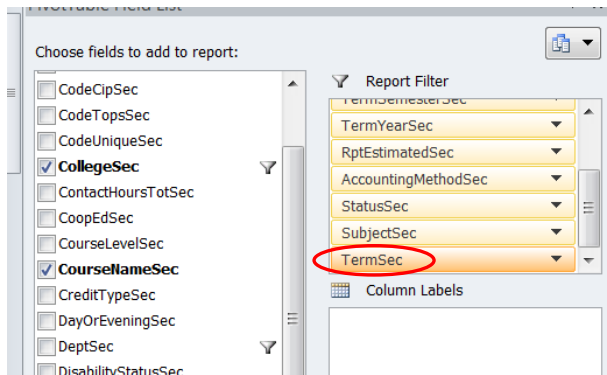
2. Click on the drop down window for "TermSec," click on "Select Multiple Terms," uncheck "All," and check Fall 2011 and Fall 2012.
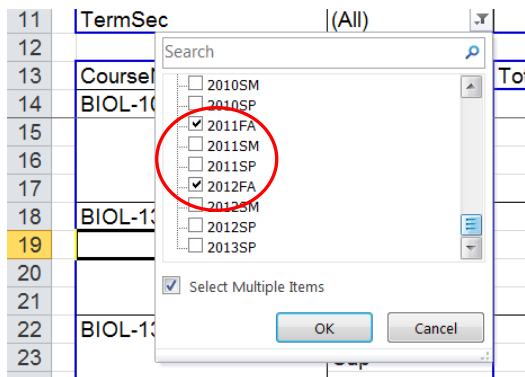
3. Drag the "TermSec" field from the Report Filter window to the Column Labels window.

4. The user can now view the two selected terms in the columns.

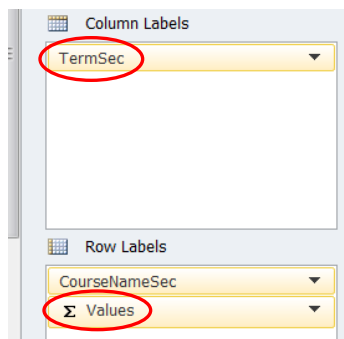| CourseNameSec	Data	TermSec		
		2011FA	2012FA	Grand Total
BIOL-100	#Sec	7	7	14
	Cap	224	217	441
	EnrCenTotal	225	224	449
	%Retent	91%	100%	95%

Moving Values to Rows and the Term to Columns

If the user wanted to examine the number of sections offered in each term for the last two terms and read the information from left to right rather than scrolling down, the user will need to move the calculated values to the columns.

1. When trying to plan section offerings it might be easier to view information from term to term so that the user can see the sections from term to term without having to scroll down.

   Here the user has to scroll down to see how many sections of ANAT-101 were offered in Fall 2012.

TermSec	CourseNameS	Data #Sec	Cap	EnrCenTotal	%Retent
2011FA	ANAT-101	6	192	198	80%
	ANAT-150	5	160	160	71%
	ANAT-151	2	64	67	93%
	ANAT-159X4	1	5	5	100%
	BIOL-100	7	224	225	91%
	BIOL-130	2	48	37	92%
	CHEM-101	6	180	176	91%
	CHEM-102	1	24	21	95%
	CHEM-150	2	36	36	92%
	CHEM-151	2	36	37	95%
	CHEM-212	1	20	23	70%
	PHYSIC-100	4	56	56	80%
	PHYSIC-110	4	16	15	73%
	PHYSIC-200	4	16	19	42%
2011FA Total		47	1,077	1,075	84%

2. If we move the section, cap, census, and retention data to the Row Labels and the Term to the Column labels changes over time might be easier to identify. Drag the "Values" to the "Row Labels window and the "TermSec" field to the Column Labels window.

3. Now the user can see the section and enrollment information over time by course without having to scroll down.

CourseNameSec	Data	TermSec 2011FA	2012FA	Grand Total
ANAT-101	#Sec	6	6	12
	Cap	192	192	384
	EnrCenTotal	198	190	388
	%Retent	80%	100%	90%