AD ASTRA
INFORMATION SYSTEMS

Platinum Analytics End-User Training

Strategic Solutions Consulting
Ad Astra Information Systems™, L.L.C

Module 1: Navigating Dashboard Indices

- Logging-in
- Major dashboard indices
- Index “Details”
- Filtering and expanding dashboard datasets

Module 2: Reading Section Candidate Data

- Reading section candidate data columns
- Identifying “top” section candidates

Module 3: Platinum Sandbox Navigation

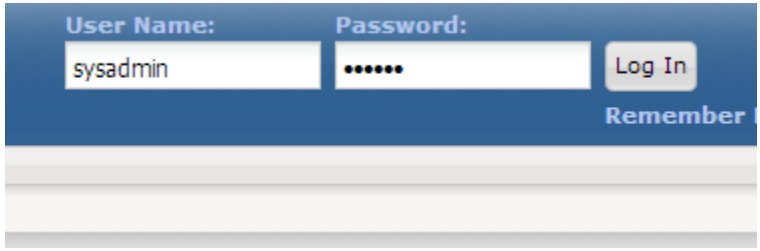
- Getting into the Analytics Sandbox
- Description of Sandbox columns
- Understanding “Projected Seats”

Module 1: Navigating Dashboard Indices

Logging-in

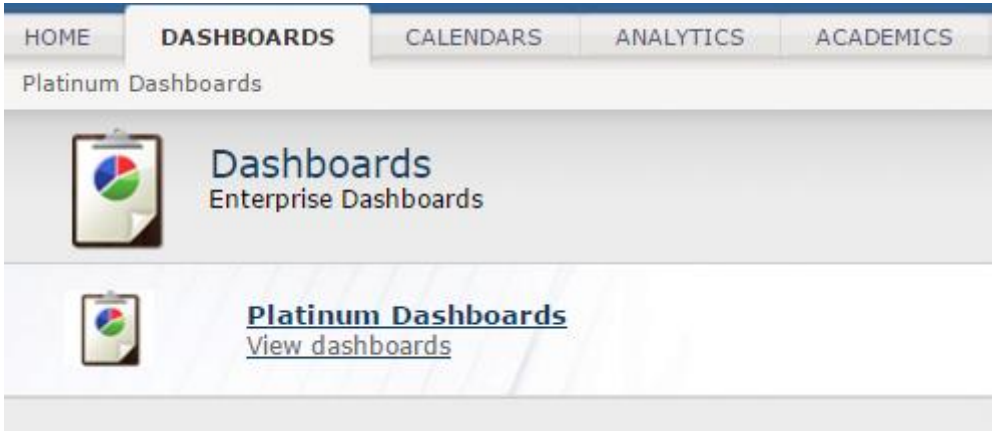
- Use your Astra-issued Platinum Analytics URL to arrive at the main page

- Login to the site with your username. You will be required to reset your password upon login.



Getting to the Dashboards

- Navigate to the “Dashboards” tab within the Platinum Analytics tool and you will find yourself on the home page.

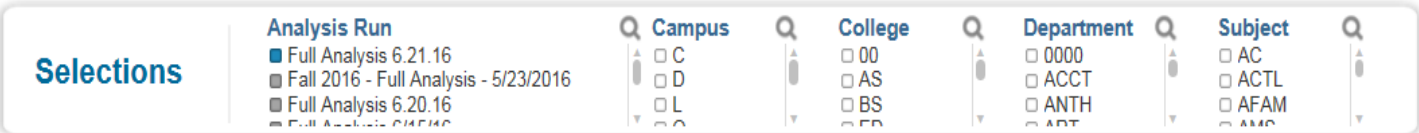


Major Dashboard Indices

- Your Dashboard HOME PAGE will be comprised of the following major indices:
  - **Enrollment Ratio**: Course enrollment divided by course enrollment capacity (or max enrollment)
  - **Balanced Course Ratio:** Percentage of overall courses whose Enrollment Ratio falls between 70-95%
  - **Overloaded Course Ratio:** Percentage of overall courses whose Enrollment Ratio is above 95%
  - **Underutilized Course Ratio:** Percentage of overall courses whose Enrollment Ratio is below 70%
  - **Top Success Candidates:** Percentage of all courses whose addition ("Student Success") candidates are top candidates
  - **Top Efficiency Candidates:** Percentage of all courses whose reduction or elimination ("Efficiency") candidates are top candidates

Major Dashboard Indices

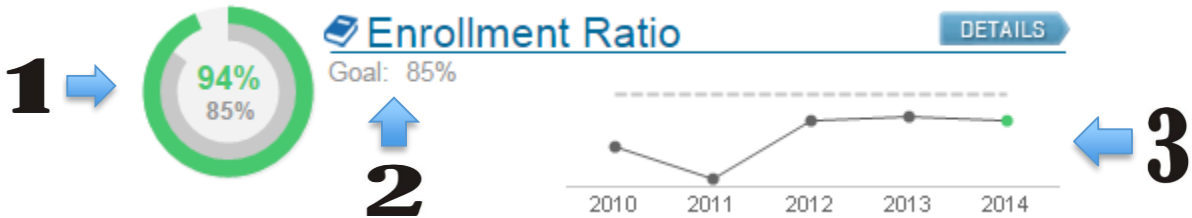
- Across the top of the Dashboard HOME PAGE, you will note a “Selections” box that allows you to immediately begin filtering your results according to several key areas:



- Filtering types include:
  - **Analysis Run**: Segment according to the time and type of data run executed
  - **Campus**: Segment according to specific institutional campuses (**Note that “online” is typically its own campus)
  - **College**: Segment according to various academic colleges, departments, or divisions as identified by your institution
  - **Department:** Segment according to specific academic departments
  - **Subject**: Segment according to specific academic subjects

Major Dashboard Indices

- Each of the six indices will be highlighted according to various data measurements. The following will give you an idea of how to read each:



- Key Data Measurements
  - **#1:** This is the total course measurement for each index. Green indicates the institution is at or exceeding goal, red indicates continued opportunity.
  - **#2**: This is the goal that Ad Astra has for institutional clients. You will note that same goal just below the actual percentage at #1.
  - **#3:** This is a historical snapshot of the institution's progress within each ratio. The ratio at time of analysis is tracked across five years and the goal as outlined in #2 can be referenced via the dotted gray line. (Note that if you hover over each dot on the timeline, the actual percentage will appear.)

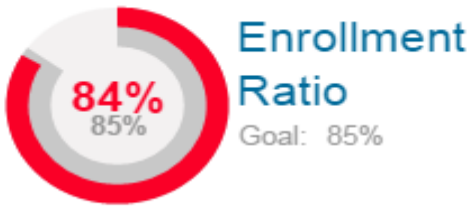
Index “Details”

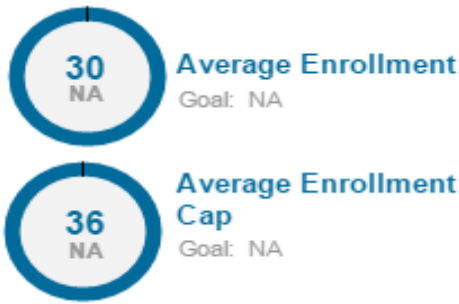
- Each of the six indices will have a “DETAILS” tab that will provide access to all related data within each ratio. Simply click on the tab to gain access to this information.

Index “Details” – Enrollment Ratio

- Once you click through the “DETAILS” home page, you’ll notice immediately that the each ratio is broken down into segments in the top left corner. Examples include:

Enrollment Ratio Index



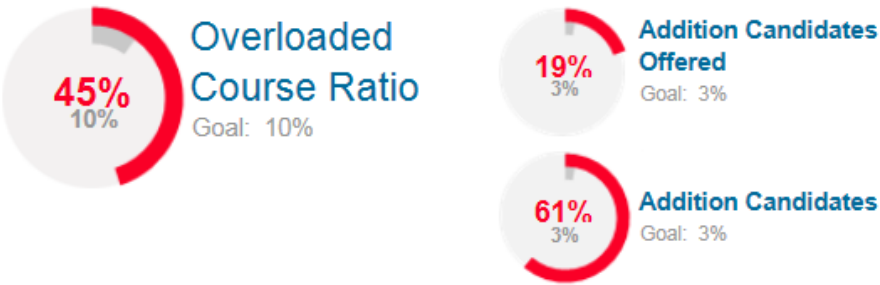


- The overall Enrollment Ratio is broken down to illustrate how “Average Enrollment” and “Average Enrollment Cap” result in this percentage.

Index “Details” – Overloaded and Underutilized

- Once you click through the “DETAILS” home page, you’ll notice immediately that each ratio is broken down into segments in the top left corner. Examples include:

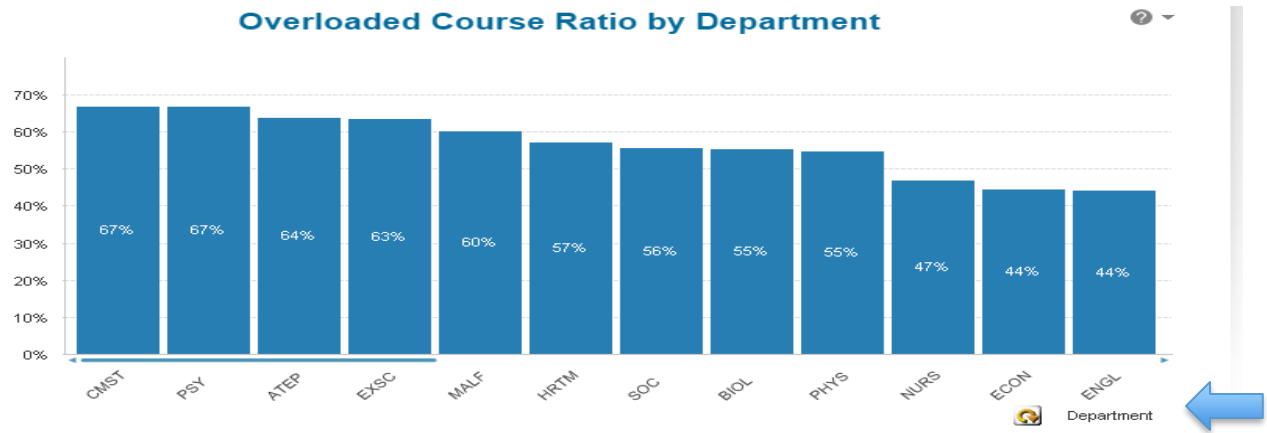
Overloaded and Underutilized Indices



- The Course Ratio is broken down into “Candidates Offered” and “Candidates.” The distinction between the two is that those sections “Offered” are those that will be available for registration in the upcoming analysis term.

Index “Details” – Data Expansion

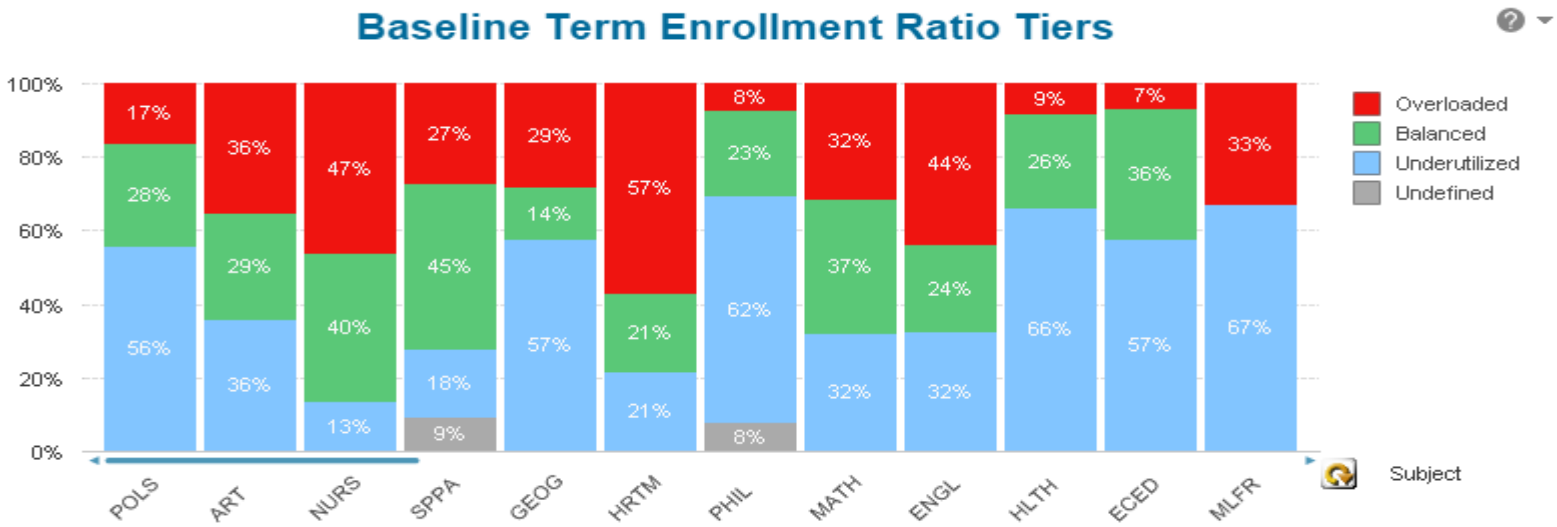
- Expanding data sets within Platinum Analytics is a great way to break down general datasets and view institutional course data through more specific lenses. Below is an example:



- Utilizing the highlighted cycle object, your institution can right-click and sort by:
  - **Subject**
  - **Course**
  - **Department**
  - **College**
  - **Division**

Index “Details” – Data Expansion

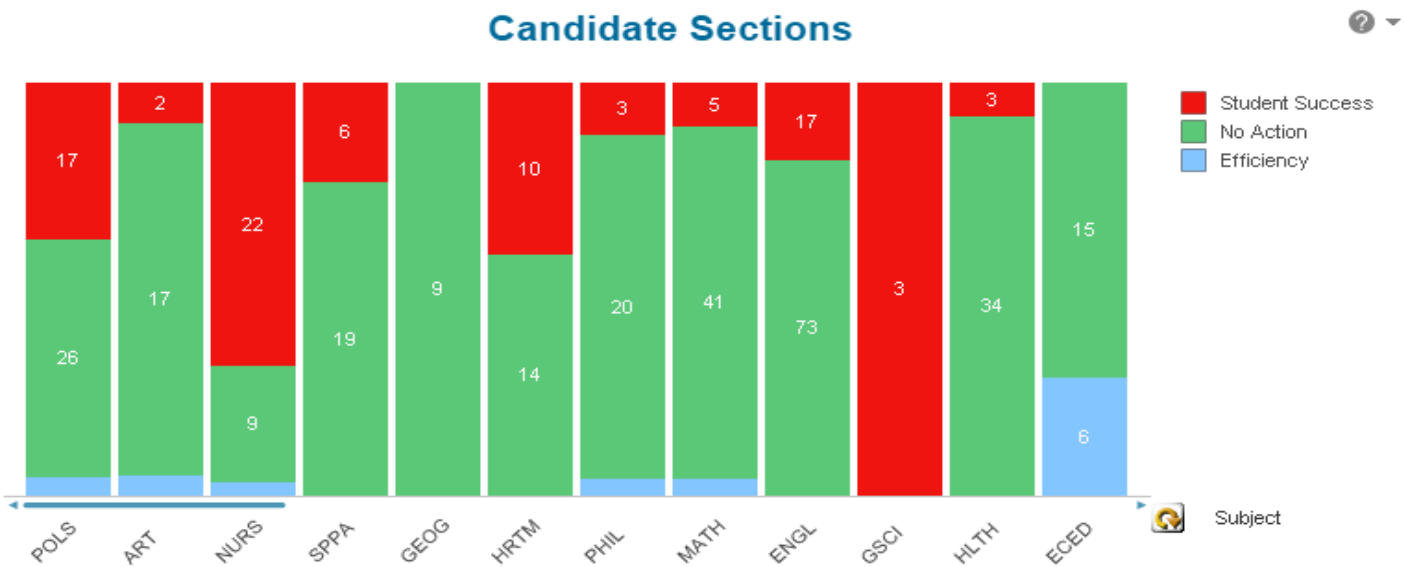
- Our second expanded data set allows your institution to see how each category of data is broken down into “Enrollment Ratio Tiers”—overloaded, underutilized or balanced.



- Again, you are able to sort into one of five categories using the cycle object.

Index “Details” – Data Expansion

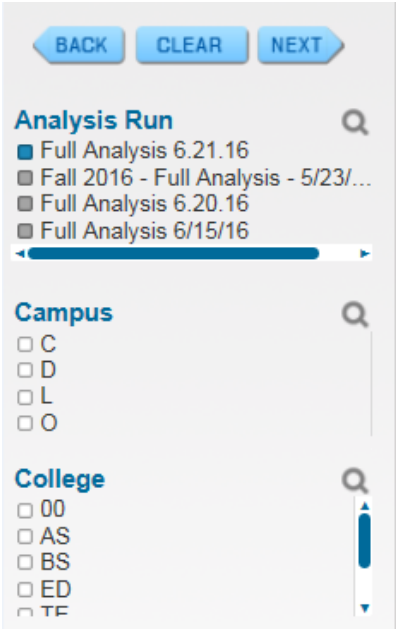
- Finally, our expansion feature breaks down specified data sets into total candidate section numbers.

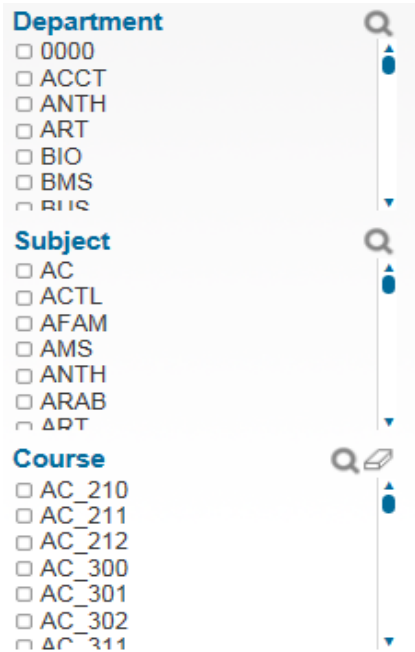


- Note that “Student Success” and “Addition” candidates are interchangeable, as are “Efficiency” and “Reduction or Elimination” candidates.

Index “Details” – Data Filtering

- Data filtering is another way in which your institution can get access to specific data. To access this feature, utilize filters along the left hand side of the DETAILS home page. (NOTE: Use the CLEAR button to remove all active filters.)





Module 2: Reading Section Candidate Data

Section Candidate Data Columns

- Below the three major data graphs, you will find a “Candidate Summary.” The major data columns that comprise this summary are as follows:
  - **Sections Offered**: The total number of sections offered in a specified segment of courses.
  - **Top Student Success Candidates:** Sections where additional need is validated from all four areas of our data analysis: predictive, program, historical and baseline.
  - **All Student Success Candidates:** Total number of addition section candidates, top candidate or otherwise
  - **Top Efficiency Candidates:** Those section candidates where reduction or elimination is validated from all four areas of our data analysis: predictive, program, historical and baseline.
  - **All Efficiency Candidates:** Total number of reduction and/or elimination section candidates, top candidate or otherwise

Section Candidate Data Columns

Candidate Summary

Department 2	Sections Offered	Top Student Success Candidates 1	Top Student Success %	All Student Success Candidates	All Student Success %	Top Efficiency Candidates	Top Efficiency %	All Efficiency Candidates	All Efficiency %
POLS	28	12	42.86%	17	60.71%	0	0.00%	2	7.14%
ART	18	2	11.11%	2	11.11%	0	0.00%	1	5.56%
NURS	36	22	61.11%	22	61.11%	0	0.00%	1	2.78%
SPPA	22	5	22.73%	6	27.27%	0	0.00%	0	0.00%
GEOG	8	1	12.50%	1	12.50%	0	0.00%	0	0.00%
HRTM	16	10	62.50%	10	62.50%	0	0.00%	0	0.00%
PHIL	21	2	9.52%	3	14.29%	0	0.00%	1	4.76%

- **#1**: Of the 17 success candidates in this institutional example, you'll notice that 12 are considered "top candidates." We would encourage this institution to look closely at Success Candidates that are strongly validated.
- **#2**: Very similar to our previous indices, you have the ability to sort this data by subject, college, course, department and division.

Course Detail Data Columns

- The final data table within the DETAILS home page covers specific course details. This is an extremely valuable dataset in that it details all candidate section data into course by course data listings. The major data columns that comprise this summary are as follows:

  - **Course/Dept/Campus**: In these columns, the course displayed will be categorized accordingly
  - **Category:** Double-clicking on this column header will allow you categorize according to those you are, or are not, offering in the analysis term
  - **Candidate Sections:** The number in this column represents the total number of courses we recommend you should add or reduce based upon data analysis
  - **Analysis Term Sections Offered:** The number in this column represents the total number of courses you are already planning on offering in the analysis term
  - **Analysis Term Sections Needed:** This number (often not a whole number) represents how many courses we recommend you offer in the upcoming term.
  - **Analysis Term Seats Offered/Needed:** These two columns break the “Sections” columns up into seats to give you a clearer indication of what to offer.
  - **Baseline Enrollment Ratio:** This is the Enrollment Ratio for the previous like term in that particular course.
  - **Baseline Avg Enroll/Cap:** This is the breakdown of how the previous Enrollment Ratio was calculated

Course Detail Data Columns

Student Success Candidates - Course Details

Success Efficiency 4

CL	Course	Dept	Campus	Category	Candidate Sections	Anly Term Sections Offered	Anly Term Sections Needed	Anly Term Seats Offered	Anly Term Seats Needed	Baseline Enroll Ratio	Baseline Avg Enroll	Baseline Avg Enroll Cap
	ATEP_330	ATEP	M	Addition (Offer...	1	2	2.87	60	86	121.67%	37	30
	BIOL_495	BIOL	M	Addition (Offer...	2	6	[illegible]	90	120	125.56%	19	15
	CHEM_371	CH...	M	Addition (Offer...	1	1	[illegible]	14	33	242.86%	34	14
	CHEM_493	CH...	M	Addition (Offer...	1	1	[illegible]	0	2	-------	1	0
	EXSC_431	EXSC	M	Addition (Offer...	1	1	[illegible]	40	69	155.00%	62	40
	EXSC_451	EXSC	M	Addition (Offer...	1	3	3.80	60	76	111.67%	22	20
	EXSC_453	EXSC	M	Addition (Offer...	1	3	3.75	60	75	113.33%	23	20
	EXSC_524	EXSC	M	Addition (Offer...	1	1	1.80	20	36	180.00%	36	20
	EXSC_528	EXSC	M	Addition (Offer...	1	1	1.75	20	35	175.00%	35	20
	HRTM_491	HR...	M	Addition (Offer...	2	2	4.00	15	32	226.67%	17	8
	NURS_214	NU...	M	Addition (Offer...	1	5	5.50	42	44	102.38%	9	8
	NURS_312	NU...	M	Addition (Offer...	1	4	4.88	32	39	106.25%	9	8

- **#1**: This particular institution has organized the "Category" so that courses they are offering in the analysis term are brought to the top of the list.
- **#2**: In the analysis term, this institution is offering 2 sections of ATEP_330, but we recommend they offer 1 additional section.
- **#3:** Based upon the analysis outlined in the columns, to the right, we recommend adding .87 (or 1) additional section of ATEP_330
- **#4:** By clicking on this toggle, this institution could switch between Success and Efficiency candidates. They are currently looking only at Success Candidates, hence the "Addition" recommendations throughout.

Module 3: Platinum Sandbox Navigation

Getting to the Sandbox

- If you click through to Sandboxes, the list of all your existing sandboxes will come up.
- Note that is important you make sure you are looking at the appropriate Sandbox
  - **Historical Analysis**: Analysis ONLY consisting of historical data
  - **Full Analysis**: Analysis comprised of historical, program and predictive data

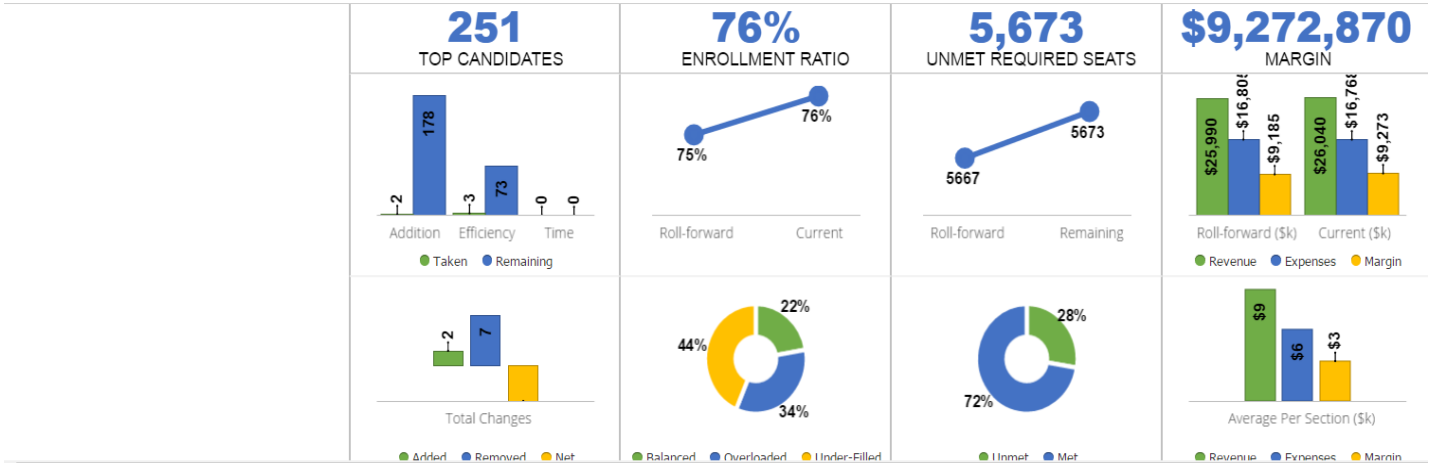
Sandbox List

New

	Name	Type	Analysis Term	Status	User
	SPA 2	Student Progress Analy...	201710	Completed	sysadmin
	SPA Run	Student Progress Analy...	201710	Completed	sysadmin
	Fall 2016 - Full Analysis - 5/23/2016 - fix 7	Analysis Run	201710	Completed	sysadmin
	Fall 2016 - Full Analysis - 5/23/2016	Analysis Run	201710	Completed	sysadmin

Sandbox Main Page

- Once in the sandbox, the first thing you'll note is a suite of dashboards across the top and a list of "top candidate" recommendations across the bottom.



		Subject	Cours..	Title	Seats	Sections	Sections Need..	Candidates	Candidate Typ...	Campus	Seats Need...	Required Sea...	Met Req. Seats
	Accept	EDT	315	Ed Tech in Sec Schl Classroom	42	3	1.4	1	Reduction	C	19	0	0
	Accept	BMS	113	Lab Exper-Biomolecular Sci	60	3	7.2	4	Addition	C	143	67	13

Sandbox Dashboard Metrics

- Across the top of the sandbox, our dashboard metrics are designed to interact with potential decisions you make as you tweak the schedule. As you “Accept” the recommended changes, you will see these metrics shift to reflect these changes. The metrics are as follows:

  - **Top Candidates**: The highest-impact positive change candidates (addition, reduction, elimination), displayed as number of sections. Users should consider accepting these recommendations to improve the efficiency and margin of the academic schedule.
  - **Enrollment Ratio:** Average enrollment divided by average course enrollment cap (last like term).
  - **Unmet Required Seats:** The number of seats needed in required courses that are not currently offered in the analysis term. Note: This value is a number of seats, not students. One student could have more than one required seat counted in this number.
  - **Margin:** This final metric measures the financial “margin” of the courses within the sandbox, as measured by the delta between revenues (tuition rates per credit hour and expenses (instructor type cost).

Sandbox Data Columns

- As you look down at the course/section recommendations, you will note the following columns:
  - **Subject/Course/Title/Seats/Sections**: These first five columns are a straightforward summary of what you plan to offer according to the roll-forward schedule
  - **Sections Needed:** This number is the calculated number of sections we recommend you should be offering according to the analysis results.
  - **Candidates:** This number is the total amount of additional or reduced sections we recommend you should offer according to the analysis results.
  - **Candidate Type:** This column indicates the type of candidate each recommendation is—addition, reduction, elimination, or no action.
  - **Campus:** This column indicates on which campus the section candidate is held.
  - **Seats Needed:** This column tallies the total number of seats we recommend are needed according to the analysis results.

Note: All columns are moveable, left or right, by clicking and dragging. The first 7 columns are static for your convenience.

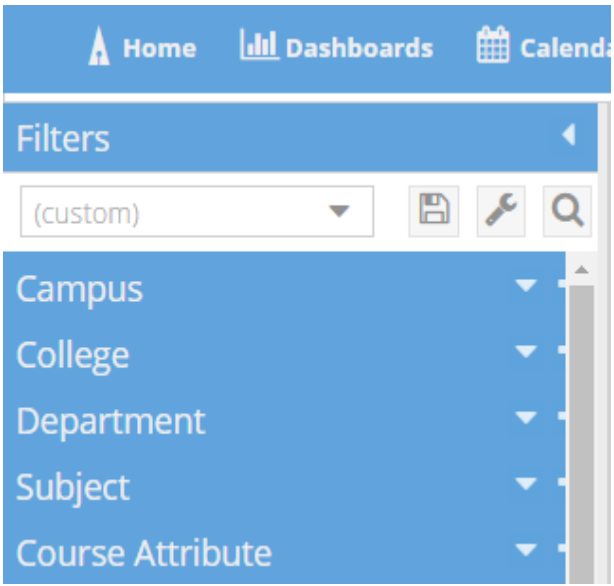
Sandbox Data Columns - continued

- As you look down at the course/section recommendations, you will note the following columns:
  - **Required Seats**: This column tallies the total subset number of “seats needed” that correspond to 100% core course requirements for students.
  - **Met Required Seats:** This column calculates, by total number of seats, the extent to which the current schedule meets core course requirements for students.
  - **Unmet Required Seats:** This column calculates, by total number of seats, the extent to which the current schedule does NOT meet core course requirements for students.
  - **Capacity/Availability/Section Conflict:** These columns indicate the potential conflicts that will prevent students from getting access to the course.
    - “Capacity” indicates a mismatch between seats offered/seats needed
  - **Revenue/Expense/Margin:** These columns indicate the financial margin status of a course based upon average tuition revenue and average faculty salary figures.
  - **Opportunity:** This column highlights the revenue impact at stake in the context of the courses recommendation.

Note: All columns are moveable, left or right, by clicking and dragging. The first 7 columns are static for your convenience.

Sandbox Main Page – Data Filtering

- There are a few ways in which you can gain easier access to the course data you seek. The following filters will help you navigate.



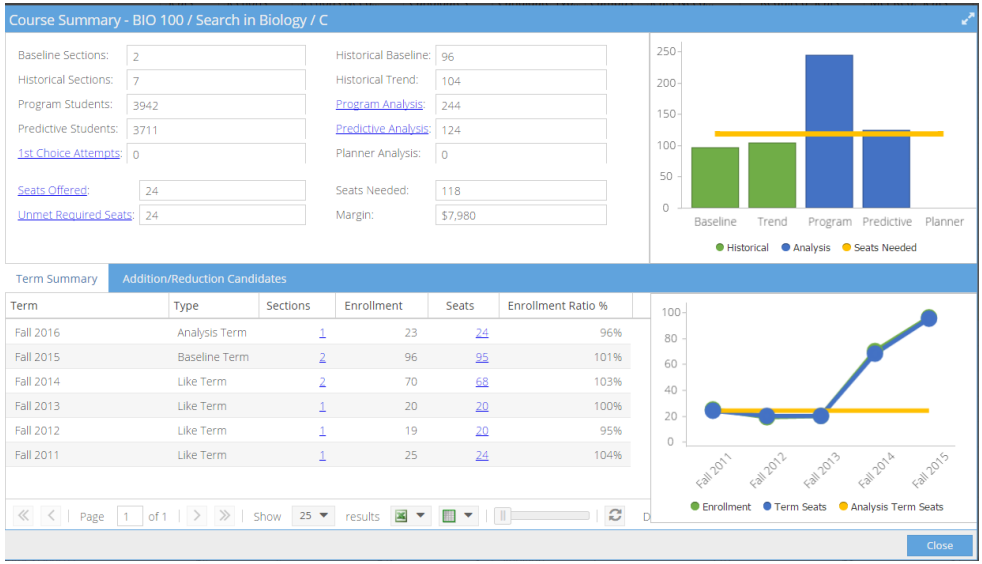
On the left side of the main screen, you can self-select according to:

- Campus, College, Department or Subject
- Previously identified course attributes

Note: Dashboard metrics will adjust to reflect the filtered data.

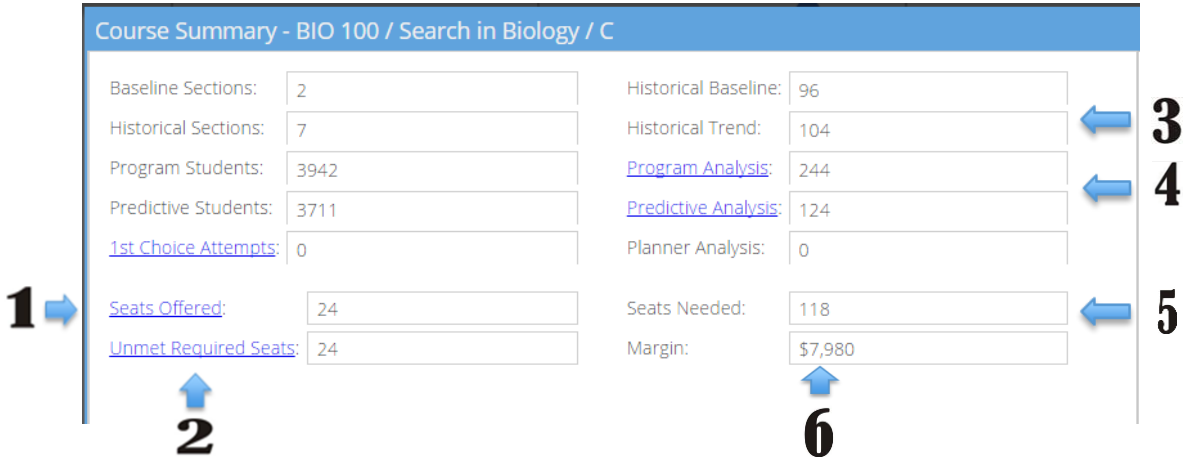
Reading an Analysis Summary

- If you click on any one of the courses within the Sandbox application, you will be directed to an “Analysis Summary” that looks like what you see below:



- The data displayed in the box is a depiction of how we arrived at both the number of seats you are offering and the number our data analysis indicates is the total Seats Needed.

Reading an Analysis Summary – Course Summary



#1: The number of seats currently offered in the Analysis Term is 24.
#2: If the institution were to move forward with current seats offered, they would be short of meeting core student requirements in this course by 24 seats.
#3: This institution offered 96 seats in the baseline term. Looking back five years, this course has seen an overall upward enrollment trajectory, hence the 104 seat recommendation for the analysis term.
#4: There are 244 students who are eligible to take the course and have it as some requirement. 124 students would LIKELY take the course when running predictive analysis.
#5: Based upon weighting all analysis types, we believe this institution should be offering 118 total seats.
#6: If the institution were to run the course as is (with 24 seats), the analysis projects a +$7,980 margin between faculty costs and tuition revenue garnered from enrolled students in the course.

Reading an Analysis Summary – Term Summary

Term	Type	Sections	Enrollment	Seats	Enrollment Ratio %
Fall 2016	Analysis Term	1	23	24	96%
Fall 2015	Baseline Term	2	96	95	101%
Fall 2014	Like Term	2	70	68	103%
Fall 2013	Like Term	1	20	20	100%
Fall 2012	Like Term	1	19	20	95%
Fall 2011	Like Term	1	25	24	104%

1 ⇨ ⇦ 2

- The “term summary” for each course in the analysis will highlight the historical trend of that course for all the historical like terms accounted for in the analysis (Max: Five like terms)
  - **#1**: In this example, Fall 2015 is the baseline term. (Most recent like term)
  - **#2**: The enrollment ratio in the baseline term was 101%

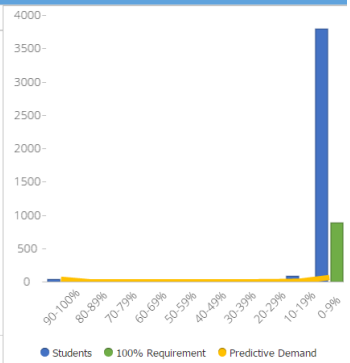
**Note that if you click through the hyperlink in the “Sections” or “Seats” tab, you can gather the section details of each section offered.*

Reading an Analysis Summary – Students

Program Demand | Predictive Demand | Demand by Requirement | Students by Program | Students by Major

Range	Predictive Demand	Students	100% Requirement
90-100%	40	40	1
80-89%	0	0	0
70-79%	0	0	0
60-69%	1	1	0
50-59%	2	3	0
40-49%	1	2	2
30-39%	1	4	1
20-29%	4	15	2
10-19%	10	82	31
0-9%	65	3795	883
Totals	124	3942	920

Page 1 of 1 | Show 25 results



- Clicking on the highlighted "Program/Predictive Analysis" links opens a breakdown of students analyzed for that course. These tabs segment the analyzed students by:
  - Overall probability of their enrollment in the course
  - "Demand by Requirement," defined by connection to the course within the degree audit
  - Program in which the students are enrolled
  - Major in which the students are enrolled

    **Note from this view, you can click into the "Students" column for a student-by-student breakdown of course enrollment probability.*

Ongoing Tips and Tricks

- As you continue to utilize the Platinum Analytics product, please remember the tips below to help guide your navigation:
  - If needed, the “HELP” tab in the top right corner will address most questions. Within the HELP feature, refer to “Analytics” and “Dashboards” sub-tabs for the most pertinent information.
  - You can refresh your memory of most terms defined in this presentation by simply hovering over the term within the application. The definition should appear for your convenience.
  - By clicking on the circular “?” icon next to most indices, you can print, sent to Excel, or export most findings.

AD ASTRA
INFORMATION SYSTEMS

Platinum Analytics End-User Training

Strategic Solutions Consulting
Ad Astra Information Systems™, L.L.C