

Now that we have selected a comparison institution, we can continue our analysis and explore how to create custom comparison groups.

The Customize DFR function of the Use the Data Portal is organized by steps indicated by separate tabs on the screen. We have already completed step one, where we identified our comparison institution. We now move on to step two, data report. As we complete each step, the next step becomes active and a summary of the selections are identified.

We can see that East Stroudsburg University of Pennsylvania is set as our comparison institution. Note that you can always return to previous steps and make a change. To return to step one, click on the tab for that step, or click on the change button across from My Comparison Institution. Since we wish to keep East Stroudsburg as our comparison institution, we'll click on step two, data report.

Steps must be completed sequentially. You cannot move forward to the next step until you've made a selection for the current step. For example, since we've not made a selection for step two, step three is shaded and not active. We'll select Create a Custom Data Feedback Report as our data report type and move forward to step three, identifying your comparison group. This adds our data report type to the summary of our analysis. A comparison group may include between one and 100 schools, although a size of 10 to 30 institutions is recommended. If the group contains fewer than five schools, data for some variables may be excluded from the report.

Three methods are available for selecting institutions to include in your comparison group. First, you can select institutions by typing institution names one at a time. You may also select institutions by groups. The by groups option includes three techniques for group selection. The first, EZ Group, allows you to create your own selection criteria based on a limited set of IPEDS variables.

The second technique, Automatic Group, includes automatically generated comparison groups created by NCES based on characteristics of the comparison institution, such as Carnegie classification, control and level of institution, degree granting status, title four status, state or region code. The third technique, Saved Group, is only available for institutions that have previously submitted a custom comparison group for the creation of their data feedback report. The final method for creating a comparison group is to upload a list of institutions saved from a previous session. We'll demonstrate how to upload a file after we highlight the Automatic Group feature.

The automatically generated group may or may not be appropriate for your analysis. Nevertheless, it is a quick way to define a comparison group so you can practice using the customized DFR and its features. The automatically generated comparison group for East Stroudsburg University of Pennsylvania contains 31 schools.

Before we proceed, let's review the list of institutions in our comparison group and make some adjustments to the list. Scroll down to review the names of institutions in your comparison group. Since our list has 31 institutions, we have two pages. To review the second page, click on the link for page two. To modify the list, click on the modify button. Then, remove names from the list using the check boxes and links provided. For example, we can remove California State University San Marcos by first clicking on the modify button. Then, checking the box next to Virginia State University and clicking the link to remove selected. We now have 29 institutions in our comparison group.

If we notice an institution that is missing, we can add it to our comparison group list. Click on By Names or Unit IDs. Next, type in the name of the institution to add. For example, Bloomsburg University of Pennsylvania. When the name and unit ID appears, click the link or the school name, and the institution is added. We now have 30 institutions in our comparison group.

Again, click the link to download our data feedback report this time using our custom comparison group. Now you can select the PDF icon for the year of data you would like to download, or you can select an institution from the dropdown menu and the PDF icons appear for that institution. Click on any one of these links to view, print, or download the report. When we are finished, we'll close the window to return to our analysis.

Finally, we'll demonstrate how to use the Upload a File feature mentioned earlier in the video. To do this, we'll first show you how to download your custom list, then how to upload it in a new session. In this example, we'll say that East Stroudsburg University of Pennsylvania wants to compare itself to the other 4-year public institutions located in Pennsylvania, with an enrollment between 5,000 - 9,999. This gives us the 10 additional institutions you see on screen. To save this list of institutions for future reports, select Main Menu, then Create, Save, or Upload Institutions. After you select it, you'll have the option to export your list. When you export it, the extension is .uid, and can be opened with Notepad.

To upload a list, we'll return to the screen with only East Stroudsburg University of Pennsylvania as our selected institution. Next, we'll choose to Upload a file. You'll be prompted to log in, and after logging in, you'll need to select the file for upload. Once you select the file and upload it, the list you saved in a previous session will appear, and you can use the remaining steps in this tutorial in the same way we'll continue to demonstrate with our Automatic Group selections from the previous screens.

For more information on the material presented in this tutorial, please contact the IPEDS help desk.

[end video 2]