



Retention Data Center

Users Guide

For Additional information or questions, contact:
StudentSuccessTech@RuffaloNL.com

[Video Tutorials](#)

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Preparing to Setup your Survey Administration

How do I get started?

My suggestion would be that you start by reviewing our Retention Data Center “[How To](#)” button and watch the “Overview Video”.

Once you have a basic “lay of the land”, you can customize your survey. Once your survey is setup with your preferences, you are sent to launch the survey

Optional – Preloading a student file with first name, last name, student ID, email address, date of birth and potentially grouping fields (this file can actually be uploaded at any time and is not required at all if you wish).

Do you have best practices for implementing the survey?

Yes, we have a webpage dedicated to additional information regarding this. It can be found [here](#).



How do you login to your Retention Data Center account?

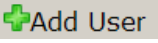


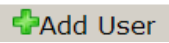
To access the Retention Data Center, Log In at our Web site, www.ruffalonl.com/myRuffaloNL, and access your myRuffaloNL account. If you haven’t received myRuffaloNL access information in a separate e-mail or if you have forgotten your password, click “Forgot your login.” Enter your email address and your password will be sent to you instantly. Once logged in, select Retention Data Center from the box titled myApplications.

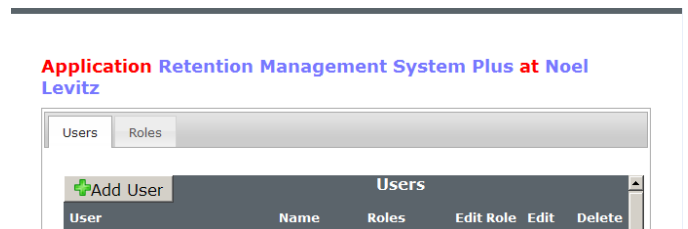
Can my colleagues access our Retention Data Center account?

You may create accounts for as many colleagues as you need to access the Retention Data Center. Their accounts login information will be their email address and a password that you assign. You can ask the user to request their password at www.ruffaloNL.com by selecting ‘forgot my login’ and entering their email address. Once logged in with their email address and password, they can change their password if needed.

To give access to colleagues:

1. Select 
2. Select 

-  - Grant access to the Data Center.
 -  - Remove access to the Data Center.
 -  - Edit the record or change the assigned role.
3. Select 





4. Confirm user is not already in the drop down menu 'Assign Existing User'. This is an indication the person already has established a myRuffaloNL.com account. If found, select the name and assign a role (outlined below). If not found, use *Create New User* or *Upload Users from File* for multiple entries. Once the users account is created, the user can login with their email address and password. If not provided with a copy of their password, they can simply select forgot my login at www.ruffaloNL.com and a copy of their password will be sent to them.

Create New User

E-mail

Password

Comments

First Name

Last Name

To Create New User

1. Complete the following fields in the box presented:

User Name: user e-mail address
Password: default password (change recommended)
Comments: brief note about entry (optional)
First Name: user first name
Last Name: user last name
 Select Role: *Select only one* of the roles identified below

2. Select Role: Select only one of the roles identified below
3. Save your work.

The user can now access the Retention Data Center through their secured myRuffaloNL account by logging in at <https://client.ruffalonl.com>. If password for user is unknown they can select "Forgot my Login" and a password is sent to the e-mail address on file.

Upload Users from file

1. Create File (typically created in excel) and save as Windows CSV (comma separated/comma delimited). The file format is as follows (if you do not wish to provide a comment, leave the column blank):

Column(if using excel)	Field	Max Length	Format	Record Verification
A	User E-mail	60	Required - This will be the user's Login ID. Must be a valid e-mail address.	✓
B	Default Password	50	Required - Alphanumeric and special characters allowed.	✓
C	User First Name	100	Required	✓
D	User Last Name	100	Required	✓
E	Comments	255	Optional	
F	Role	255	Required - options include: Coordinator, Global Advisor, Limited Advisor, Global Data Analyst, Limited Data Analyst, Technical Coordinator.	✓

2. Browse to your saved file and select Upload

What do the different Roles mean for myRuffaloNL accounts?

When asked what roles you should assign your users to, I ask:

1. Do you want them to have access to everything in the Retention Data Center?
 - a. If Yes, then Coordinator (Note, if you are restricting access of some users so they only see subsets of students and not all, but you want someone to have access to ALL students, you will want to assign them as Coordinator)
 - b. If No, as the next two questions
2. Do you want them to have access restricted students (students that indicate 'no' they don't want to share their results with anyone other than the coordinator on the final question of the survey).
 - a. If Yes, then Global
 - b. If No, then Limited
3. Do you want them to have access to the Coordinator Report, Export Data, and Summary Results?
 - a. If Yes, then Data Analyst
 - b. If No, the Advisor

	Dashboard	Access can be limited	Restricted Reports	Student Report	Advisor/Counselor Report	Coordinator Report	Summary Reports	E-mail Student	Edit Student Profile	Advisor Notes	Export Data	Import Data	Survey Creation/Modification	Configuration button
Purchaser	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Coordinator	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Global Data Analyst	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			
Limited Data Analyst	✓	✓		✓	✓		✓	✓	✓	✓	✓			
Global Advisor	✓	✓	✓	✓	✓	✓		✓	✓	✓				
Limited Advisor	✓	✓		✓	✓			✓	✓	✓				
Technical Coordinator	✓										✓	✓		

How can I change my survey end date?

If you need to update your end date, you will need to contact StudentSuccessTech@RuffaloNL.com. We cannot push your end date past 3/31/20XX unless we receive a new order for the next year.

How long does the College Student Inventory survey take to complete?

Form B: Approximately 20 minutes
Form C: Approximately 15 minutes

Does the survey require additional programming on our end?

No additional programming is needed. You might consider adding the URL link as a favorite for easy student access, but no programming is needed.

The survey is compatible with all major web browsers.

Reports do not generate well on mobile devices. I would suggest using a desktop when accessing reports from the Retention Data Center.

Student access to the survey is done via a URL link. You can use a standard survey URL or personal URL link (PURL). Neither of which require any programming in order for the student to use.

Note, this information is available in the document titled: System Requirements and security

Can I customize with our logo?

Yes, in the upper right corners of the Retention Data Center, click on the “Configurations” → Survey Theme button. You can browse to your image, adjust the color banners on the survey and select Apply Theme. If you don’t like the outcome, just try again.

Notes: an image file must be in the format of JPEG, TIFF, PNG that is not wider than 231 pixels and not higher than 65 pixels.

Can I change standard items on the survey?

No, you cannot change standard items on the survey. This includes the demographics on the login page. They cannot be changed. We also cannot modify the order of the survey questions. All custom question will appear after all standard items are complete.

Are all questions on the survey mandatory?

All questions on the survey are mandatory. With the exception of the two items listed below:

- Student ID and phone number on the login screen
- Parent’s education on the demographics portion of the survey.

Note: The survey does not indicate these are not mandatory and it cannot be noted on the survey. You can mention it in your email or modify the text on the login screen that appears after Student ID or Email Address.

The text I used is: Please note, on the demographics portion of the survey, there are two questions related to your parent’s education. If either of these questions do not apply to you, you may leave them blank and proceed.

Please enter the following information:

First Name:	<input type="text" value="Preview"/>
Middle Initial:	<input type="text"/>
Last Name:	<input type="text" value="Student"/>
Student Identification Number:	<input type="text" value="A123456"/>
Date of Birth:	<input type="text" value="Jul"/> <input type="text" value="21"/> <input type="text" value="1996"/>
Gender:	<input type="text" value="Female"/>
Email Address:	<input type="text" value="preview@institution.edu"/> <p><small>Please note, on the demographics portion of the survey, there are two questions related to your mother/fathers education. If either of these questions do not apply to you, you may leave them blank and proceed.</small></p>

Setting up your Survey Administration

How do I setup my survey?

You do not setup your survey. In order to have access to a survey, an [order](#) will need placed. If you have already ordered for the year, reach-out to StudentSuccessTech@RuffaloNL.com and let us know you need an additional survey setup.

Once your order is processed, you should expect your survey details in the next week or so. At that point, you can customize your survey.

How can I customize my survey?

Report Access: Select if students have access to their report upon survey completion.

Grouping fields: Grouping students with demographical fields provides additional sorting and filtering opportunities beyond what is collected through the standard items of the surveys.

Up to 5 categories can be used; commonly used are Academic Advisor, FYE Instructor, Residence Hall, Indicated Major, etc.

Limited access to others on campus: This allows you the ability to designate others on campus for access to specific groups of student records (outlined above) with limited access to areas of the Retention Data Center and reports available for students.

Survey entry page: Allows you to request specific information for Id and e-mail. Example: “Please enter your 7 character student Id here. (W234567)” or “Enter your university.edu address here”.

Custom Questions: You can have approximately 50 total questions in your account for the life of your account. These are multiple choice questions and require a response from your student. They appear at the end of the survey, after the standard items. You can provide as many response options as necessary to create a rating scale (1 Strongly Agree – 7 Strongly Disagree) to a Yes/No question. Custom questions are also filterable and exportable for further analysis. Once used, custom questions CANNOT be modified as it will affect historical data.

Student Report narrative text: Up to 1,000 characters (500 for SYSA) can be inserted as the first paragraph of each of the categories.

Confirmation Email: Upon completing the survey, students will receive an automatic email. You can customize the contents of this email message.

How do I update my grouping fields?

Your five grouping fields can be updated/populated in three different ways (these options can be combined to use multiple methods).

1. You can have them appear as a dropdown menu on the login page of the survey for students to respond to. In the survey setup wizard (SURVEYS button → Edit Survey):
 - Select the number of grouping fields you wish to use (maximum of 5)
 - Select Next
 - Check 'show on survey'
 - Update the "Display Name" by clicking on and typing in the field box
 - Add the new Survey response options in 'Survey Response Options'
 - Check to 'include in survey' in 'Survey Response Options'
 - Be sure to add an option of "Unknown, Other, or N/A" if needed.

Item	Field Name	Display Name (for this survey)	Show on Survey?	Assigned Security	Configuration Action
1	Custom Grouping 1	Major	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Survey Response Options
2	Custom Grouping 2	Advisor	<input type="checkbox"/>	<input type="checkbox"/>	Survey Response Options

2. You can upload the grouping assignment in a student file (either prior to administration, during your administration or after your administration) (yes- you can upload as many times as you need). See [Uploading Student Records](#) for more information.
3. You can manually update them on the STUDENTS tab using the check boxes or edit student tab.

Additional notes:

- these options can be combined to use multiple methods
- no more than 5 grouping fields can be used (you might consider using custom questions)
- the 'Assigned Security' check box only needs selected if you have individuals that you want to login to the Retention Data Center, but should only see a subset of students. The subset of students must be indicated by a grouping field and the user will need a login. See the section titled '[I only want my advisors to see their advisees](#)' for more information.
- if you update reports after they have previously been generated, you may need to reach out to StudentSuccessTech@RuffaloNL.com to have the report regenerated with the newly uploaded data.

How do I add custom questions?

You can add multiple choice questions in which a student would select one response to your survey. The questions appear at the end of the survey and appear on the Advisors/Counselor and Coordinator Report as well as the Custom Question Export.

Our suggestion is that you only use 5-10 custom questions to each of your surveys. You have a total of 50 questions for the entire life of your institutions Retention Data Center account. Once used custom questions cannot be modified as it will affect historical data.

For sample custom questions, see the document found in our [How To](#) documentation.

Adding custom questions to a survey is a two part process:

1. Adding the questions to your account
2. Checking to include the specific questions in your survey setup

Adding custom questions to your account

Start in the upper right corner at

CONFIGURATION

1. Click Configure Custom Questions
 - The page displays questions already created and provides a button to add more. Responses to existing questions can be reviewed by hovering over the information button.
 - Questions that have been used previously in survey administrations become locked and cannot be edited; this maintains them for future use and reporting purposes. Once used, a new question must be created to make edit. If questions need removed from your master list, notify StudentSuccessTech@RuffaloNL.com
2. Add a question by clicking **Create Custom Question**
3. Enter your question in the Question Text box provided. A question label is required and will not appear on the survey, but will be used as the label in the export of student responses.

QUESTION TEXT: As students will view on the survey.
Enter your question here...

QUESTION LABEL: Represents the header row in exported data.
Short descriptor

ANSWERS: Add a row for each response from which students can select.

Item	Answer Text	Actions
•	Response one...	✖
•	Response two...	✖
•	Etc...	✖

Add a row

4. Enter responses for your students to select from. Click Add a row as needed for the number of responses required.
5. Click SAVE and the question will become part of your master list.

Things to consider:

- Use the Edit or Delete buttons to make changes to new questions.

Responding to custom questions is required; consider adding 'Don't know', 'Not sure', 'Unknown'

IMPORTANT: To include question(s) in your survey be sure to return to SURVEYS and Edit Survey to include new additions to you choice of custom questions.

Adding Custom Questions to your survey

Once your custom questions are added to your account, you need to add them to your survey administration. To add the questions to your survey administration:

1. Go to the SURVEYS button within the Retention Data Center
2. Select Edit Survey in the dropdown menu found on the right
3. Proceed to the page titled "Include Custom Questions" by selecting the Next button
4. Select "Yes", you want to include custom questions

5. Select Next
6. Use the checkbox to select the questions you wish to include in this survey administration
7. Select Next

Inactivating your historical custom questions

As previously noted, you can have a total of 100 questions in your account. Of those 100, only 50 can be active. If you inactive a question, it is not available for selection in your survey setup. To inactivate questions:

1. Go to the CONFIGURATIONS button in the upper right corner of the Retention Data Center
2. Select Configure Custom Question
3. Click on the ACTIVE/INACTIVE button found on the far right
4. Select Update State

How do I administer the survey?

Once your survey is setup, you will have a standard survey link. You can distribute this links in a computer lab, as a classroom assignment, in orientation or via email invitation. If you need this link, you can find it at the Retention Data Center, under the SURVEYS button by selecting “Survey Summary or Print Survey Invitation” from the dropdown found on the right of your survey administration.

If you wish to send email invitation from the Retention Data Center to your students, you have that option as well. In order to do this, you will need to upload a student file prior to survey launch. For more information about any of these options, let us know.

You can also distribute the students Personal URL (PURL) locally as well. Once you have uploaded a student data file, you can retrieve their personal URL links with the Export Data Function (Survey Link). This link can be emailed locally, posted on a portal or provided via other methods.

How do I get my survey URL?

1. Login to the Retention Data Center
2. Select the SURVEYS button
3. Using the dropdown menu on the right of your current/new administration, select survey summary or print survey invitation.

Can I download my students' Personal URL links?

After a student file has been uploaded or students have entered the survey, you can download your student's Personal URL links. To do this:

1. Login to the Retention Data Center
2. Select the EXPORT DATA button
3. Confirm your “Survey View” is set to the correct set of students
4. Select Add a New Template
5. Scroll through the list and move “Survey Link” from the left to the right
6. Select Export
7. Select Export Now

How do I upload a student file?

It is not required that you upload a student file. It can be helpful to track those that have not completed the survey. And if you plan on sending invitation emails to students from the Retention Data Center, a file upload is required.

To upload a student file, create an excel file starting with our template.

1. Copy and paste your data into our template.
If possible, you should always include ID, Email Address, DOB, and name.
If you don't have information for other fields, leave the column blank with the header row in place. Remember, you define your 5 grouping fields, the sample template is just an example of what could be used.
2. **Verify that none of your columns have a comma (semi-colon are fine) if saving as a CSV.**
3. Double check that last name is in column K and there is a header all the way to column N
4. Confirm all fields match the "requirements" found in the Student Access File Details button
5. Open your Retention Data Center account
6. Upload within the Import Data button of the Retention Data Center (note, the dropdown menu should say Student Access File).

More information regarding the specifics of your import file can be found under the IMPORT DATA of the Retention Data Center.

Student File Format

In order to upload a student file, the file must be in the following format and saved as Windows CSV (comma separated/comma delimited).

Column (if using excel)	Field	Min Length	Max Length	Format	Record Verification
A	Student ID	1	100	Required	✓
B	Student E-mail	1	60	Required - Must be a valid e-mail address	✓

What do I do with an upload error (Unsupported file type)?

If you receive an error when uploading your student file and the file did not successfully upload. Check the following items:

1. Are you using the template? Try pasting your data directly into this document and then upload.
2. Is the column format matching the notes in the "Student Access File Details"? If not, please update.
3. Do any of your columns have commas if you are saving on the CSV? If so, they will need to be removed.

If that doesn't resolve the issue, contact StudentSuccessTech@RuffaloNL.com with a screenshot of your student file for reference.

If you receive an error when uploading your student file and some of your records were successfully loaded. If you open the file of errors, it will indicate why the records did not load. You



may correct the errors and reload just those records (quicker) or your entire file. Whichever you prefer.

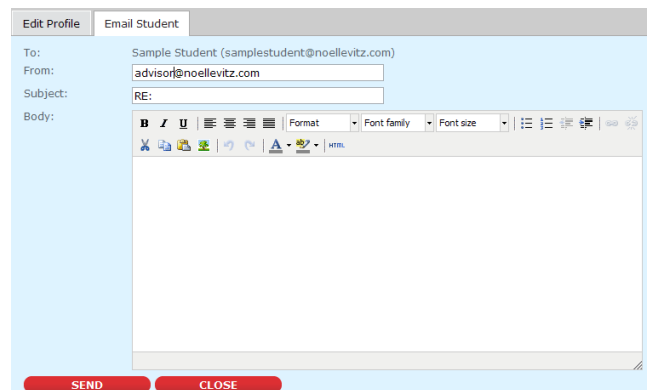
How do I email invitations to my survey recipients?

The e-mail communication tool allows you to send messages to individual students or to a group of students. All emailing is done under the STUDENTS button.

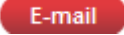
If you have not done so already, you need to allow RNL to send emails on your behalf. We can do this individually (one email address at a time) or for your entire domain (@institution.edu). In order to start this process, provide us with your IT Department contact name and email address at StudentSuccessTech@RuffaloNL.com. We also suggest that you give the IT contact a heads up that we will be reaching out. Our IT team will then follow-up with the contact provided and complete the needed steps.

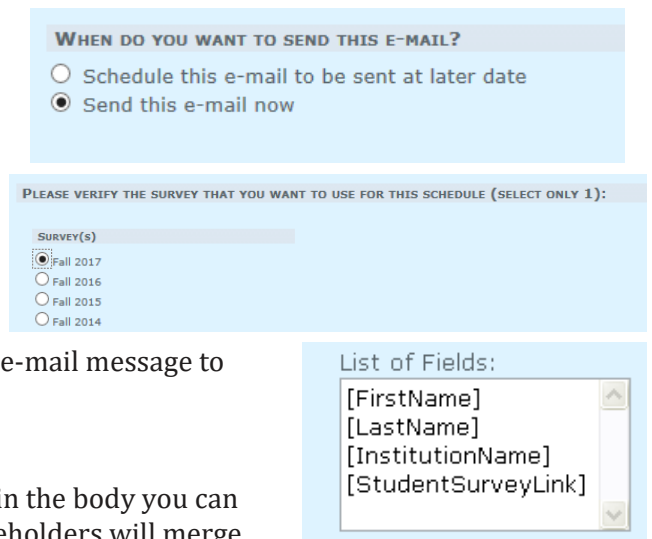
E-mailing One Student

1. Select  under Actions and the student information page will appear.
2. Select the E-mail Student Tab.
3. Complete the following fields:
 - a. *From:* E-mail address of the sender.
 - b. *Subject:* Subject line of the e-mail.
 - c. *Body:* The content of your message.
4. Select 



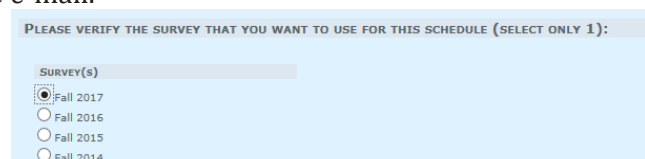
E-mailing a Group of Students - NOW

1. Use the survey view and/or filtering options to select the group of students you want to e-mail (the check boxes do not work).
2. Select 
3. Select "Send this e-mail now" and select **Next**.
4. Confirm the student count and select **Next**.
5. Complete the following fields:
 - a. *Template Name:* Select from the drop down menu of predefined templates or create your own template by naming the e-mail message to save and use now and/or at a later date.
 - b. *From:* E-mail address of sender.
 - c. *Subject:* Subject line of e-mail.
 - d. *Body:* The content of your message. Within the body you can copy from the "List of Fields." These placeholders will merge student-specific information into the content of your message. Select **Next**.
6. **Send Preview** for final review or **Send** the e-mail.



E-mailing a Group of Students - SCHEDULE

1. Select 



2. Select “Schedule this e-mail to be sent at a later date” and select **Next**.
3. Select the survey administration for the message and select **Next**.
4. Confirm your filter is set appropriately (if you only want the reminder/message sent to not complete students, be sure the filter **ONLY** includes Not Complete)

WHEN DO YOU WANT TO SEND THIS E-MAIL?

Schedule this e-mail to be sent at later date

Send this e-mail now

- a. Note, if you are coming back through to modify you message, be sure to select ‘New Filter’. The system does not like when you select Previously Saved Filter.
5. Complete the following fields:
 - a. Start Date: Date you want e-mails to begin.
 - b. End Date: Date you want e-mails to end.
 - c. Select the day(s) of the week to be sent.

PLEASE SELECT:

Previously Saved Student List

STUDENT COUNT	FILTER NAME	SURVEY NAME	SURVEY STATUS
237	Saved Filter	Fall 2017	Not Completed

Student List

STUDENT COUNT	FILTER NAME	SURVEY NAME	SURVEY STATUS
237	---	Fall 2017	Not Completed

6. Complete e-mail fields
 - a. *Template Name*: Select from the drop down menu of predefined templates or create your own template by naming the e-mail message to save and use now and/or at a later date.
 - b. *From*: E-mail address of sender.
 - c. *Subject*: Subject line of e-mail.
 - d. *Body*: The content of your message. Within the body you can copy from the “List of Fields.” These placeholders will merge student-specific information into the content of your message. Select **Next**.

PLEASE SPECIFY YOUR SCHEDULE:

When to start and end the e-mail

Start Date:

End Date:

Days of the week to send e-mail

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

7. Send Preview for final review or Save the scheduled message.

Note, if you received an error, see step #4 (don’t use previously saved messages).

How do I edit my scheduled emails?

If you go back through the email wizard and update the dates (to today), the email will no longer be sent as previously scheduled. The updates will overwrite the previously saved schedule.

Do I have to send email messages?

No, you do not. Many campuses just use their survey URL and distribute it locally.

Why am I receiving an error when updating an email?

If you are attempting to save a previously scheduled email but are receiving an error that looks like:

ERROR: Object reference not set to an instance of an object.

“Typically” this occurs when you select the ‘previously’ saved filter.

On this step, make sure the second one is checked.

Send E-mails to Filtered Students ✕

PLEASE SELECT:

Previously Saved Student List

STUDENT COUNT	FILTER NAME	SURVEY NAME	SURVEY STATUS	Restricted Students Included
519	Saved Filter	Fall 2016	Not Completed	

Student List

STUDENT COUNT	FILTER NAME	SURVEY NAME	SURVEY STATUS	Restricted Students Included
519	---	Fall 2016	Not Completed	

No, don't continue. Go to Filters to select a different list of students.

BACK
NEXT

Can I restrict who sees students?

If you only want your advisors to see their advisees (this applies to any colleagues that you only want to have access to a subset of students and not all. You can “assign security”).

Step 1: Add the grouping responses ([discussed above](#))

Step 2: Create logins for each advisor ([discussed above](#))

Configurations – User Administration area of the Retention Data Center

Step 3: Tie the advisors login to their grouping response

If you only want your advisors to see their advisees (this applies to any colleagues that you only want to have access to a subset of students and not all. You can “assign security”).

This is the step in which you tie the RNL logins to their designated grouping response.

1. Go to the SURVEYS button in the Retention Data Center
2. Select –Edit Survey- from the dropdown menu on the right of your survey administration.
3. Select Next Three times
4. If it is not already checked, make sure “Assigned Security’ is checked for the field with the designated grouping responses.



5. Select Next
6. Open up the field name
7. Open up each grouping response by clicking on Assign Users
8. Check the appropriate individuals to have access to that grouping response.

Select a Grouping Field and assign users:

▼ Advisor			
Item	Assigned	Response Option	Actions
1		Advisor One	Assign Users
▶ Major			
▶ Residence Hall			
▶ Course Section			

▼ Advisor

Item	Assigned	Response Option	Actions
1		COB	Assign Users
2	✓	Dodson-Tibbs; Donna	Assign Users
3	✓	Gonzales; Mercedes	Assign Users
4	✓	Holloway; Laura	Assign Users
5	✓	Johnson; Reginald	Assign Users
6	✓	Jones; Trevor	Assign Users
7	✓	Nicholson-Preuss; Mari	Assign Users
8	✓	Nutt; Zack	Assign Users
9	✓	Reckelhoff; Lori	Assign Users
10	✓	Sabido; Thalina	Assign Users
11	✓	Thomason; Rita	Assign Users
12		Truffan	Assign Users

How do I 'start' my survey?

Once your survey is setup and customized as you wish, you are set to launch. To launch the survey, distribute your survey URL (either locally or via emails from the Retention Data Center).

How do I change my end date?

Changing your end date is very simple. To change your end date,

1. Login to the Retention Data Center
2. Select the SURVEYS button
3. Select Edit Survey from the dropdown menu on the right of your prospective survey
4. Enter an updated end date
5. Select Next

Can I preview my survey?

Yes, you may use the preview survey options by:

1. Go to the SURVEYS button
2. Select Preview Survey from the dropdown menu

Or if you wish to complete the actual survey, you may do so. Let us know when you have completed the survey and we can have your survey responses removed.

I loaded a student file and gave students the generic link. What is going to happen?

Your students will be asked to enter their information on the login screen of the survey. Once they enter their information, the database will use its matching criteria to see if it matches any students in the system. If it matches, the student will match. If it doesn't match a new record will be created. To match, a record needs to match with one of the following:

- Last Name, DOB, Student ID
- DOB, StudentID
- FirstName, LastName, StudentID
- Email, StudentID
- Last name, DOB, Email
- DOB, Email,
- Lastname, FirstName, Email

- Lastname, Firstname, DOB

Post Survey Administration

My students have completed the survey, what do I do now?

Once your students have completed the survey, you can login to the Retention Data Center and pull reports, export data, pull summary reports, do your analysis, share your results with others on campus and start you student conversations.

Note, you can pull reports at any time. Not all students need to be completed in order to begin pulling reports.

Additional resources for [“reviewing your results”](#) and [“sharing your results”](#) can be found on the web.

How do I get my students reports?

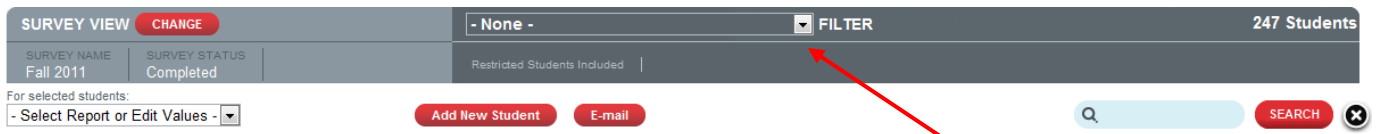
You will be able to view, print, or save individual reports or sets of reports as students complete the survey. Summary results and exportable data will also be available. You also have the ability to retrieve filtered sets of students for report retrieval, summary reports or outreach.

For more information pulling reports (both individual and summary reports), within the [How To](#) button of the Retention Data Center, see the documents titled: Report Retrieval with Summary Results.

How can I filter my student records?

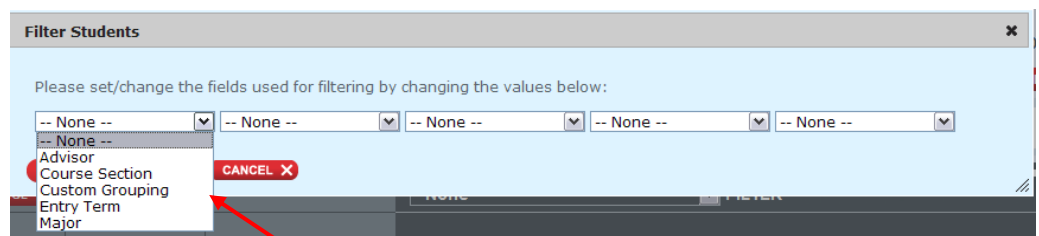
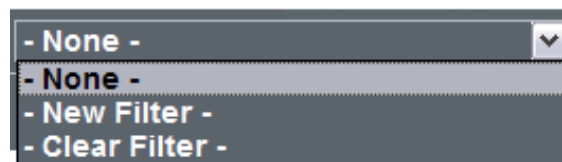
Filtering students allows you to view groups of students with specific criteria you identify.

Create a new filter, use an existing filter, or clear an applied filter at the drop-down menu provided.



Creating a New Filter

1. Select - New Filter – from the Filter Dropdown Menu (found on the STUDENTS Button, EXPORT DATA button, or SUMMARY RESULTS button) .
2. Select the field(s) for the filter using the drop down menus. Combinations of data fields may be applied by using multiple drop downs.



Note – if the dropdown menus do not appear, click [Select/Change Fields](#)

3. Select

SAVE

Selected fields will present a range selection. Where multiple fields are selected a student record must fall into the range of all selections to appear on the list.

4. Enter or select the range.

5. Enter a name in the *Save the Filter* to save for future use (optional).

6. Select

APPLY FILTER ▶

Turn off a filter by selecting **Clear Filter** from the drop-down menu.

Delete a saved filter: Select **myFILTERS** in the upper right-hand corner of the data center


How can I export my student data?

Generate an exportable file with data fields from the assessment results. Use existing templates or create your own combination.


To Export Data:

1. Change Survey View or Filter to the set of student records you want to view.
2. Select the preferred export. You can select from:
 - a. Raw Survey Export: Raw data are the numbered self-reported responses of each student.


- b. Translated Survey Export: Translated data are the scales calculated from student responses and the labeled responses representing the response choice of each student.
 - c. Custom Question Export: Export the question and responses to any custom questions. Includes numbered response and text of response.
 - d. Partner Export: Export a file that can easily be imported into databases such as Hobson's Retain or Starfish that partner with Noel-Levitz.
 - e. Advisor Notes: Export each student and the advising notes associated to the student record.
 - f. Create your own file (by selecting add a new Template): allows for creating a file with selected data fields.
 - g. Legacy Partner Export: Export a file that can easily be imported into databases such as Hobson's Retain or Starfish that partner with Ruffalo Noel-Levitz prior to August 2012.
 - h. Combined Mid Year Raw Export (if applicable): contains both the CSI and MYSA raw data (raw responses to each question).
 - i. Combined Mid Year Translated Export (if applicable): contains both the CSI and MYSA translated data (scale scores).
3. Select a file format of choice (Excel, CSV, etc.)

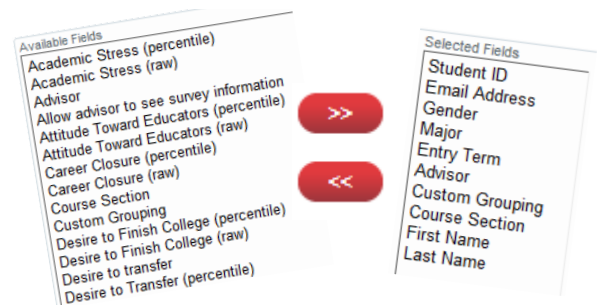


File Export Format


 4. Select

To Add a New Template or create your own export with only specified fields.

- 
1. Select
 2. Select and move fields by using the arrow buttons. The list in Selected Fields will be included in your export.
 3. Move the selected fields up and down by use the arrows.



Can we input our data into our Learning Management System (LMS)?

This includes Starfish/Hobsons Retain/Noro...

Yes, you can. You really have two options for this.

1. The PDF copies of the advisor reports – this would require you two manually login to a secure FTP site that we have created for you where your reports would be posted by StudentID.
2. Exporting and Importing data – using the 'partner export' template found in the Retention Data Center, you can export the standard data and import into your LMS system.
 - a. Note, if you have a 'homegrown' LMS system, you will need to create the function to import the data and you can export whatever data you would like.

To request a secure FTP site, email StudentSuccessTech@RuffaloNL.com indicating which report you would like post (student report, advisor/counselor report or coordinator report).

Note, prior to uploading, you will want to remove any students that have indicated their reports are 'restricted'.

If a client has used the SFTP site in the past, new reports should automatically be posted there.

Additional information found in: Starfish Retention Solutions Integration at the HOW TO button of the Retention Data Center.

What resources do have for Advisors?

We have several resources for your advisors. This includes the Advisors Guide as well as all the documents found at: [Reviewing Results with Students](#)

This includes, but is not limited to:

- a. Report Retrieval instructions for pulling reports from the Retention Data Center
- b. Overview Documents
- c. Conversation Starters
- d. Worksheets and Assignments
- e. Referral Form
- f. Student Contract for Next Steps
- g. Emailing Students (from the Retention Data Center)

Are trainings available?

Yes, we do offer trainings. We offer trainings for using the Retention Data Center as well as trainings on using your data..

For more information regarding the data trainings, [contact us](#) with a basic message about what questions you have.

Additionally, Retention Data Center tutorial videos are available for your review at any time.

<https://fast.wistia.com/embed/channel/p709mf3zld>

Do you have best practices on using the data?

Yes, we do. We have several webpages to help you out with this. They can be found within your Client Communities.

Specifically, the following pages might be helpful in this process:

- [Reviewing Results with Students](#)
- [Sharing RMS Results on Your Campus](#)

Can a student finish a survey they previously started?

If a student started the survey, but has not finished, they should be able to log back in and complete the survey. They can login using:

1. The original survey link – if they do this, they will be asked to enter their login information but once completed, they should pick up where they left off
2. Their personal URL link – you can send them an email using the ‘action’ item on the far right of their name on the STUDENTS button of the Retention Data Center. If you include the merge field of [StudentSurveyLink] their personal URL link will be merged in when the student receives the email.

Can a student retake the survey?

Yes, a student can have their results reset. Email StudentSuccessTech@RuffaloNL.com with the student's first name, last name, email address and student ID. Once I have this information, I can submit a ticket for their record to be reset.

The only other way for a student to retake the assessment (without being reset), is for the student to enter enough of their information incorrectly on the login page of the survey. Because if they enter the same information, the system will recognize they already exist and not allow them to take it again.

Note, this could take several weeks to complete.

Can a student be “unrestricted”?

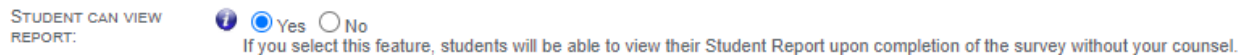
If a student has given consent to un-restrict their report, email StudentSuccessTech@RuffaloNL.com with the student's first name, last name, email address and student ID. RNL admin can update this record.

How can I delete a completed student record?

Yes, with your confirmation, we can make the update. Email StudentSuccessTech@RuffaloNL.com with the student's first name, last name, email address and student ID. RNL admin can update this record.

Can a student get their results after completing the survey?

Yes, a student can retrieve their reports assuming in the survey Wizard, the question asking if students are allowed to see their results is noted as “yes”.



Assuming this is the case:

If the student has already completed the survey and clicks on their personal URL, they can click on a button that indicates “view student report”.

If they have already completed the survey and then click on the general URL, they will be asked to enter their login information. Assuming ENOUGH of the information entered on this screen matches their completed record, once they hit ‘take survey’ they will be prompted to have a copy of their results sent to the original email used when taking the survey.

Can I email students their results?

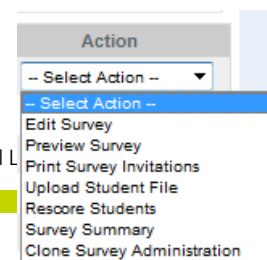
The email communication tool allows you to send students a link in which they can access their results (there is no direct attachment to the email).

In order for students to receive their Student Report the survey status must be **ACTIVE** and set to **YES** to allow students to view their results.

Step 1: Confirm that your survey is still open and student can view their report.

Begin at 

7. Select **-Edit Survey-** from the drop



down menu of the survey you wish to adjust.

8. Make sure the End date is appropriately adjusted for your students to have adequate time.
9. Confirm survey setting 'Student Can View Report' is set to **Yes**.

Note: moving forward, any student that completes the survey with this link will immediately see their results.

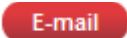
10. Select Next (with one click of the Next button your changes are saved).

You are now ready to e-mail your students.

Step 2: Emailing a Group of Students

From Dashboard select the COMPLETED students, or at STUDENTS use the red CHANGE button and/or *filter options* to identify your group of students.

Note: The student count identified in the gray toolbar will be the group receiving the email. Once identified:

1. From STUDENTS, select 
2. Click "Send this e-mail now", click Next.
3. Confirm the filter and student count, click Next.
4. Complete the following fields:

Template Name: Select from the drop down menu of pre-defined templates or create your own template.

From: Email address of sender.

Subject: Subject line of email.

Body: The content of your message. Within the body copy from the "List of Fields." These placeholders merge student-specific information into the content of your message. Make sure your message includes [StudentSurveyLink] exactly as presented here as the merge field that will present the personal URL for students to access their results, click **Next**.

5. Send Preview for final review. (Click Back if updates are needed, or...)
6. Send Email.

Important: Please share this IP address with your network team and be sure that e-mails from the Retention Data Center are not being blocked: 72.50.228.113 with a domain name of ruffalonl.com

Can I pull a summary report of only a subset of my students?

Yes, but you must be able to filter to that subset of students using either: Grouping field responses, custom questions, demographic responses or report outcomes. If you wish to use one of your grouping fields that isn't already present you must add them by:

1. Adding the response options to your survey setup (be sure to check and include them in the survey) and then manually re-assign the students
2. Upload a student file with the new grouping fields assigned.

WHEN DO YOU WANT TO SEND THIS E-MAIL?

- Schedule this e-mail to be sent at later date
- Send this e-mail now

The student must be assigned the grouping field in order to filter to them.

How do I access old data?

Yes, the data is still present in your Retention Data Center account. You can no longer see it on the DASHBOARD, but if you simply go to the SURVEYS button and select the red CHANGE button, you should see the survey administrations you are referring to.

Note – moving forward, we will be archiving data that is more than 5 years old.

Where can I find a hard copy of the survey to print?

Email StudentSuccessTech@RuffaloNL.com for a hard copy of the survey.

How can I schedule time to chat with the RNL team?

Feel free to [contact our team](#) with a basic message about what you are looking for. We are happy to schedule a time to chat or answer any questions you might have.