Retention Data Center

Users Guide

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

Contents

Preparing to Setup your Survey Administration

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.

Note, you will be assigning each user a 'role'. This role determines what aspects of the Retention Data Center they have access to.

For more information regarding creating accounts or Retention Data Center 'roles', see the document titled myRuffaloNL Accounts at the HOW TO button of the Retention Data Center.

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	✓										✓	✓		

What needs to be completed prior to your administration starting?

• Your survey must be setup and customized with your preferences.

• 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 at your client community's account under the Retention Management System Plus – Implementing your Survey section.

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

Form A: Approximately 45 minutes
Form B: Approximately 20 minutes
Form C: Approximately 15 minutes

Does the survey require additional programming on our end? What browsers do you accept? Is the survey mobile compatible?

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

We suggest using Internet Explorer (IE) with the Data Center (no students use the Data Center).

The survey is compatible with: mobile devices, IE 10 and 11, Chrome, Firefox and Safari. We do not promise to be compatible with Bing.

Reports do not generate well on mobile devices. I do not suggest using a mobile device for this.

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.

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 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 mother/fathers 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:	Preview
Middle Initial:	
Last Name:	Student
Student Identification Number:	A123456
Date of Birth:	Jul ▾ 21 ▾ 1996 ▾
Gender:	Female ▾
Email Address:	preview@institution.edu

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.

Setting up your Survey Administration

How do I setup my survey?

The steps to set your survey up, depend on if you have previously administered the online survey in the past or if this is your first time. If this is a new survey for you, please reference the survey setup documents (CSI, MYSA and SYSA) found at the HOW TO button of the Retention Data Center.

If you have administered the survey before, survey setup is quite simple because you can clone your last survey administration. To clone your last survey administration:

1. Login to the Retention Data Center
2. Go to the SURVEYS button
3. Use the dropdown menu on the far right of your last administration and select –Clone Survey Administration-
4. Change the survey name (Example: Fall YYYY CSI). *Be sure to remove the word clone.*
5. Select Clone Survey
6. Use the dropdown menu on the far right of your newly created administration and select – Edit Survey
   a. Be sure to update the end date, expected student count and review all other details. Remember, it copied everything that you did last time. If it all applies, you should be good!

Note – your end date can be changed at any time by using the –Edit Survey- option found in the dropdown menu found in the SURVEYS button of the Retention Data Center.

If you would like additional information on cloning your administration, the document titled – Survey Setup – Clone Previous Survey, found in the How To… button should be helpful.

How can I customize my survey?

Grouping fields: These are the 5 options you have to assign students to various groups. Examples include, but are not limited to: Major, Advisor, Sport, Residence Hall, or Instructor. These can be added directly at the SURVEYS Survey Editor and treated like a drop down list for students to select from or loaded as part of a student file at the IMPORT DATA function. Your current grouping fields are:

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.

How do I update my grouping fields?

Your five grouping fields can be updated/populated in three different ways (yes, there are only five):

- You can have them appear as a dropdown menu on the login page of the survey for students to respond to
- Checking 'show on survey'
- Add the new Survey response options in 'Survey Response Options'
- Check to 'include in survey' in 'Survey Response Options'

To create more than one group of students within a set, or batch, each group display name must be configured separately. Group display names will appear on individual student reports, Advisor/Counselor Reports, and Coordinator Rep

Item	Field Name	Display Name (for this survey)		Show on Survey?	Assigned Security
1	Custom Grouping 1	Major	Change Display Name	☑	☐
2	Custom Grouping 2	Advisor	Change Display Name	☐	☑
3	Custom Grouping 3	Mentor Community	Change Display Name	☐	☐
4	Custom Grouping 4	Service Learning/Teaching Circle	Change Display Name	☐	☑
5	Custom Grouping 5	UHD Seminar	Change Display Name	☐	☐

1. You an upload them 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 to)
2. You can manually update them on the STUDENTS tab using the check boxes or edit student tab.

Note – 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' on page 12 for more information.

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

If you would like additional information the How To document with samples may be helpful.

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.

Do I need to 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.

How do I upload a student file?

To upload a student file, create an excel file with the following information.
Note, fields in red are required. If you don't have something, leave the column blank. Also, you define your 5 grouping fields, the list below is simply an example of what you might be using.

A	B	C	D	E	F	G	H	I	J	K	L
Stude nt ID	Email Address	Date of Birth	Gend er (M/F)	Group ing Field	Group ing Field	Group ing Field	Group ing Field	Group ing Field	First Name	Last Name	Stude nt Status

123456	123456@univ.edu	01/01/2001	F	Accounting	Smith	Section 1	Grundy Hall	Student Athlete	Courtney	Greene	Military/Veteran

Once your file is created:

1. **Verify that none of your columns have a comma (semi-colon are fine)**
2. Save the file as CSV (comma delimited) and
3. Open your Retention Data Center account in Internet Explorer
4. Upload within the Import Data button of the Retention Data Center (note, the dropdown menu should say Student Access File).

When uploading, I received an error that says 'Unsupported file type - Please choose a CSV file to upload.' What does that mean?

You probably have a column with a comma. Remove the comma from your file. Add the header row to your file and save as a .CSV file.

I uploaded my recipient file, but received errors. What do the errors mean? What do I do next?

The successful 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 setup my emails to be sent to my survey recipients?

Once your student file is loaded, you can click on the 'incomplete' survey count from the DASHBOARD and go to the STUDENTS button. From there click on the red EMAIL button. Don't be afraid of this button. Go through the prompts responding as you should. Prior to actually sending the message, you will be able to send yourself a preview and you will be asked to confirm that you would actually like to send the email.

Note: you cannot pre-save messages. They will automatically save in your templates once you send the message but before then you can't login and add a message as a template.

If you want to schedule an email, you will have the option to schedule the same message to be sent re-occurring during a given time period (example each Tuesday from 08/01-8/31).

Note: The check boxes do not work for the email function. The email function is driven specifically off of the 'survey view' so in order to only email a subpopulation, you must filter to the subset of students.

For more information, see Emailing Students in the HOW TO button of the Retention Data Center. Also email templates can be found here for your review.

I clicked the 'send email' button and nothing happened or I didn't receive my email.

If you clicked the send email button and nothing happened. You might try switching internet browsers. We suggest using Internet Explorer with the Retention Data Center.

If you received notification that yes, your email was sent, let the RNL Support Team take a look at our email database and see what we can see.

I have emails that are automatically scheduled to be sent, how do I stop them?

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.

I am attempting to 'save' a previously scheduled email but am receiving an error message. What do I do?

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					

I only want my 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. What do I do?

Step 1: Add the grouping responses (discussed above)

This can either be done as part of a student file upload-(each student assigned a different advisor) or in the survey setup process you can manually add each advisors name.

Step 2: Create logins for each advisor

Configurations – User Administration area of the Retention Data Center

Step 3: Tie the advisors login to their grouping response

This is part of the survey setup and appears after the 'secure access' field is checked for the advisor grouping field.

Select a Grouping Field and assign users:

▸ Advisor

▸ Service Learning/Teaching Circle

▾ 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

Additional information can be found in: Securing Access of campus colleagues

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.

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 on this, within the How To… button of the Retention Data Center, see the documents titled: Report Retrieval with Summary Results, Filtering Student Records or Exporting Data.

Can we input our data into our Learning Management System (LMS)? Specifically 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. The Retention Data Center trainings are complimentary, but there is a fee for the data trainings. With that said, you are always welcome to call and ask any questions you might have.

For more information regarding the data trainings, email Brandi.Phillips@RuffaloNL.com.

To schedule a time for a Retention Data Center review/training, email StudentSuccessTech@RuffaloNL.com with three times that you would be available.

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 retake the assessment?

When sending emails from the RDC, if you use the designed merge field for the Student Survey URL link ([StudentSurveyLink]), each student will receive their personal URL. When they click on the link, their login information will be pre-populated and all they need to do is confirm that it is correct.

If you send an email locally, we are assuming you will be sending the general/standard survey URL. If the student click on this link they will be asked to enter their login information and then proceed to the survey.

If the student has already completed the survey and clicks on their personal URL, they will be prompted that they have already completed the survey. 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 that they have already completed the survey. If they enter enough of the information incorrectly, they could potentially retake the survey.

I had a student start the survey, but they didn't complete it. What can I do?

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.

I had a student complete the survey, but they want to retake the assessment?

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.

Note, this could take several weeks to complete.

I have a student with a 'restricted report' but have been given consent to un-restrict their report. Can you update the student's record?

Yes, with your confirmation, we can make the update. Email RMS.Tech@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 removed from the restricted list.

Note, this could take several weeks to complete.

How can I delete a completed student record?

Yes, with your confirmation, we can make the update. Email RMS.Tech@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 removed.

Note, this could take several weeks to complete.

Can I email students their results?

Yes, you can. But it requires that your survey is open and you change the survey status to 'yes' students can see their survey results. After that option is changed, any student that completes the survey will receive their results immediately.

Additional information found in: Emailing Students their results at the HOW TO button of the Retention Data Center.

I have update grouping fields and need the updates to be reflected on the reports. How can I regenerate the reports?

We can request for your reports to be regenerated on our end. Email StudentSuccessTech@Ruffalonl.com requesting your reports be regenerated for a specified survey administration. We will then have the reports regenerated.

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.

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

We have old survey administrations that I can't see. Do you still have the 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.

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

From the Dashboard, click on link 'Interpreting Your Results'. Here you can find your survey type and find Survey Samples. The PDF version is the best option for printing and reviewing questions.

What if I want to speak with someone on best practices for implementing the survey, interpreting my results, or using my results?

Feel free to email or call our team. Mari Normyle and Brandi Phillips are happy to schedule a time to chat or answer any questions you might have.