

Shortcut: Create, Save, or Upload institutions

This chapter contains detailed instructions for making, changing, and saving a list of institutions to use when creating a data file or report in the IPEDS Data Center.

A wide range of customizable reports and analytical tools are available for data use in the IPEDS Use the Data. This section will also show how to save and upload the saved institutions for subsequent data center sessions. The steps for completing each task are explained in greater detail in later chapters of this user manual. It is important to note that regardless of which task you choose, the first step in creating any data file or report within the Data Center is to select the institutions that you want to compare or evaluate.

Step 1: Getting Started

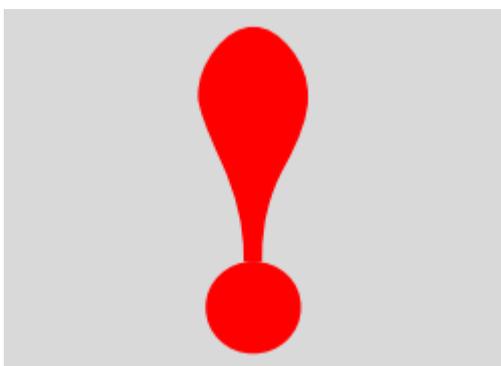
To get started creating an institution group select a task from the **Main Menu** . If you would like to create an institution group without going to a task select the Create/Download an institution group, Save, or Upload institutions from the Shortcuts menu.

Creating an institution group can be done in several ways. The methods you choose will depend on your data needs and which report you are creating. It is a good idea to familiarize yourself with each available method (visit the corresponding section or click on the links below to learn more about each):

- By Names or UnitIDs
- Selecting a Comparison Institution
- By Groups
- By Variables
- By Uploading a File

As you select institutions, they will be stored in your My Institutions list for use during your current Data Center session. You can change this list at any time or save it for use in a later session. Visit the additional sections in this chapter listed below for more information or click on the links below to learn more about each:

- Modifying the Institution Group
- Downloading the Institution Group



Critical information

You can reach the institution selection screen by choosing a Main Menu task or by clicking on the **Create, Save, or Upload institutions** shortcut on the home page. When selecting institutions by using the **Create, Save, or Upload institutions** shortcut, the option to download your list will be available

1.1 Selecting by Names or UnitIDs

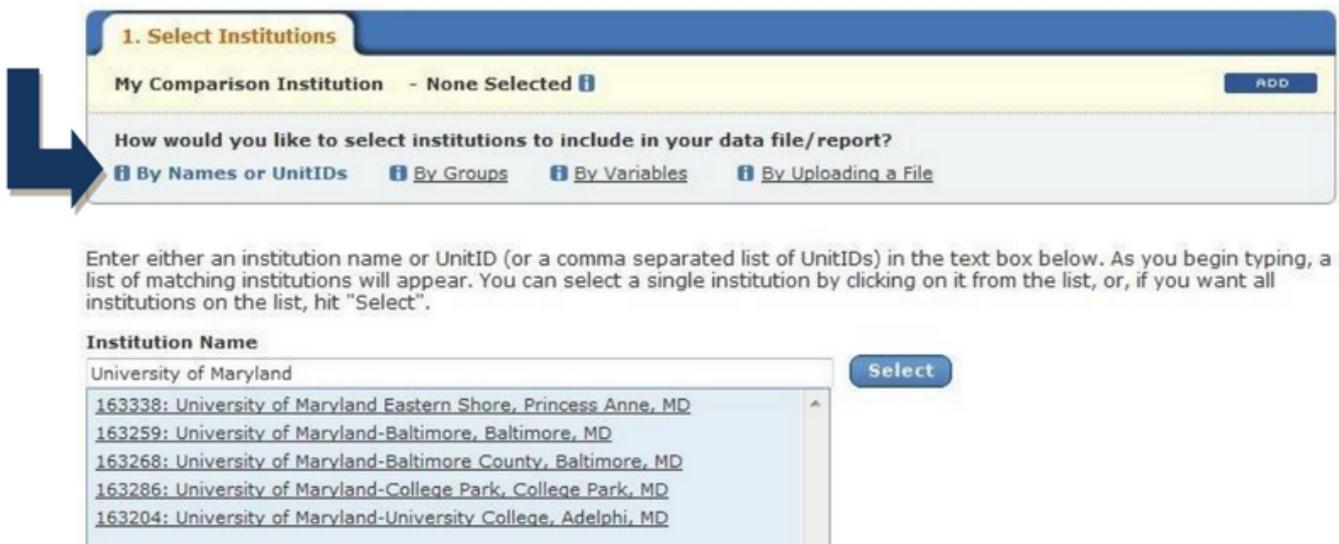
This is the default method of selecting institutions for a data file or report. You can use this option to search for institutions by full or partial Institution Name or UnitID.



Key Terms: UnitID

The unique six (6) digit identifier assigned to all institutions that have submitted data to IPEDS.

Choose this option by clicking on the **By Names or UnitIDs** link from the **Select Institutions** toolbar, as shown in the example below. Type a full name, partial name, or UnitID in the search box provided. Search matches will display in a scrollable list just below the search box.



1. Select Institutions

My Comparison Institution - None Selected **ADD**

How would you like to select institutions to include in your data file/report?

By Names or UnitIDs By Groups By Variables By Uploading a File

Enter either an institution name or UnitID (or a comma separated list of UnitIDs) in the text box below. As you begin typing, a list of matching institutions will appear. You can select a single institution by clicking on it from the list, or, if you want all institutions on the list, hit "Select".

Institution Name

University of Maryland

Select

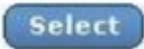
- 163338: University of Maryland Eastern Shore, Princess Anne, MD
- 163259: University of Maryland-Baltimore, Baltimore, MD
- 163268: University of Maryland-Baltimore County, Baltimore, MD
- 163286: University of Maryland-College Park, College Park, MD
- 163204: University of Maryland-University College, Adelphi, MD



Hints & Tips

When searching for institutions by UnitID, you can enter just one UnitID or a list of multiple UnitIDs separated by commas. The latter option will greatly reduce the search time for larger institution groups.

You may select an individual institution by clicking directly on it, as shown below, or choose multiple institutions from

the returned list by clicking on the  button:

Enter either an institution name or UnitID (or a comma separated list of UnitIDs) in the text box below. As you begin typing, a list of matching institutions will appear. You can select a single institution by clicking on it from the list, or, if you want all institutions on the list, hit "Select".

Institution Name

163338: University of Maryland Eastern Shore, Princess Anne, MD

163259: University of Maryland-Baltimore, Baltimore, MD

163268: University of Maryland-Baltimore County, Baltimore, MD

163286: University of Maryland-College Park, College Park, MD

163204: University of Maryland-University College, Adelphi, MD

[Select](#)

When selecting multiple institutions you will be redirected to a confirmation screen, as shown in the example below:

Select institutions to include in your data file/report. After continuing, you will still be able to add additional institutions.

[Continue](#)

Total Institutions Found: 5

[Check All](#) | [Uncheck All](#)

	<u>ID</u>	<u>Institution Name</u>	<u>City</u>	<u>State</u>
<input checked="" type="checkbox"/>	163338	University of Maryland Eastern Shore	Princess Anne	MD
<input type="checkbox"/>	163259	University of Maryland-Baltimore	Baltimore	MD
<input checked="" type="checkbox"/>	163268	University of Maryland-Baltimore County	Baltimore	MD
<input checked="" type="checkbox"/>	163286	University of Maryland-College Park	College Park	MD
<input type="checkbox"/>	163204	University of Maryland-University College	Adelphi	MD

Select the institutions to include in your current report by using the check box next to an institution's ID. You can also click on Check All to select the entire list of institutions or Uncheck All to clear any selections you have made and start again. When you have finished selecting institutions, click Continue to finalize your My Institutions list.



Hints & Tips

To sort the list of institutions, click on the active column headers for Institution Name, City, or State. To sort the list in reverse order, click on the active column header a second time.

The finalized **My Institutions** list will display once you click Continue, and the number of selected institutions will update on the status bar, as shown below.

1. Select Institutions 2. Select Variables 3. Output

My Comparison Institution - None Selected **i** **ADD**

Select Institutions - You have selected 3 institution(s) **VIEW/MODIFY**

How would you like to select institutions to include in your data file/report?

i [By Names or UnitIDs](#) **i** [By Groups](#) **i** [By Variables](#) **i** [By Uploading a File](#)

When you have finished selecting institutions, **CONTINUE** to Step 2 - Select Variables.

My Institutions **MODIFY**

ID	Institution Name	City	State
163338	University of Maryland Eastern Shore	Princess Anne	MD
163268	University of Maryland-Baltimore County	Baltimore	MD
163286	University of Maryland-College Park	College Park	MD

You can add more institutions to this list by clicking on the [By Names or UnitIDs](#) link to search again, or by using one of the other available options from the Select Institutions toolbar. The **VIEW/MODIFY** button on the status bar can be selected at any time to make changes to the list of selected institutions.

When selecting institutions by using the **Create, Save, or Upload institutions** shortcut, you may click on the **EXPORT** button to download your list.

1.2 Selecting a Comparison Institution

A Comparison Institution can be selected for most reports in the Data Center. The chosen Comparison Institution will display highlighted in your report results for easier comparison to its peers.

To select a Comparison Institution for the current task, click the **ADD** button on the Comparison Institution status bar, shown below:

1. Select Institutions 2. Select Variables 3. Output

My Comparison Institution - None Selected **i** **ADD**

Select Institutions - You have selected 8 institution(s) **VIEW/MODIFY**

How would you like to select institutions to include in your data file/report?

i [By Names or UnitIDs](#) **i** [By Groups](#) **i** [By Variables](#) **i** [By Uploading a File](#)

The **Search for new comparison institution** screen will open allowing you to select an institution to compare by searching for the name or UnitID, as shown below. If you have already selected institutions in your Data Center session, you may choose a school from your **My Institutions** list in the lower part of the pop up screen.

1. Select Institutions 2. Select Variables 3. Output

My Comparison Institution - None
Select Institutions - You have selected 8 institution(s)

How would you like to select institutions to include in your data file/report?
 By Names or UnitIDs By Groups

When you have finished selecting institutions, click on the **ADD** button.

My Institutions

ID	Institution Name	City, State	State
134097	Florida State University	Tallahassee, FL	FL
139755	Georgia Institute of Technology-Main Campus	Atlanta, GA	GA
198419	Duke University	Durham, NC	NC
217882	Clemson University	Clemson, SC	SC
199120	University of North Carolina at Chapel Hill	Chapel Hill, NC	NC
199193	North Carolina State University at Raleigh	Raleigh, NC	NC
199847	Wake Forest University	Winston Salem, NC	NC
234076	University of Virginia-Main Campus	Charlottesville, VA	VA

Once a Comparison Institution is selected, it will appear on the status bar at the top of the screen next to **My Comparison Institution**. The **Change and Remove** buttons can be used to edit this selection, as shown below:

1. Select Institutions 2. Select Variables 3. Output

My Comparison Institution - University of Maryland-College Park
Select Institutions - You have selected 8 institution(s)

How would you like to select institutions to include in your data file/report?
 By Names or UnitIDs By Groups By Variables By Uploading a File

1.3 Selecting by Groups

Institution groups may be generated from commonly used characteristics or by using previously determined groups.

To access this option, place your cursor over **By Groups** on the **Select Institutions** toolbar, as shown below:

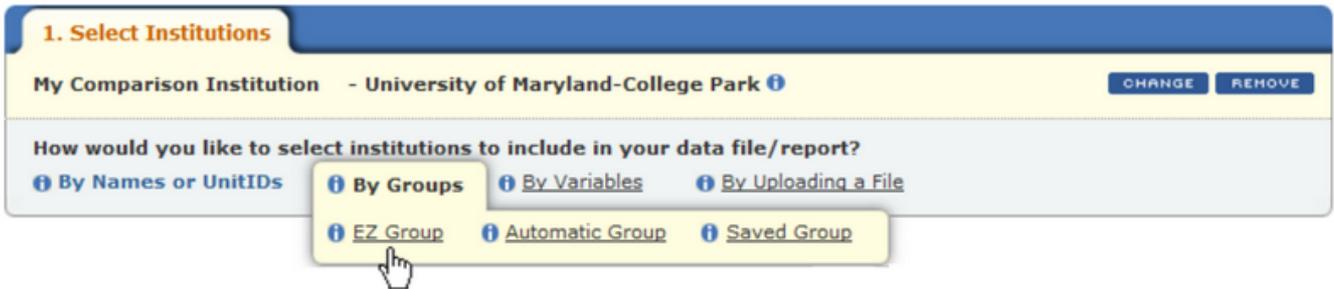
The methods listed below are available for quickly creating an institution group (visit the corresponding section or click on the links below to learn more about each):

- EZ Group
- Automatic Group
- Saved Group

1.3.1 EZ Group

The EZ Group method allows you to quickly create an institution group based on one or more frequently used criteria such as sector of institution, geographic location, or specialized educational mission (e.g. Historically Black College or University, Tribal College, etc.).

To choose this option, place your cursor over the By Groups option then click on EZ Group, as shown below:



Once you have selected EZ Group, the page will refresh to the screen shown below:

1. Select Institutions 2. Select Variables 3. Output

My Comparison Institution - None Selected ⓘ ADD

Select Institutions - You have selected 1 institution(s) VIEW / MODIFY

How would you like to select institutions to include in your data file/report?

By Names or UnitIDs
 By Groups
 By Variables
 By Uploading a File

Data Collection: 2016 [change year]

0 institutions

Clear

Search

Select

- First Look Universe ⓘ
 Title IV participating ⓘ
 U.S. only
 All institutions

Special missions (if any)

- Historically Black College or University
 Tribal College
 Land Grant Institution

Special characteristics

- [State or other jurisdiction](#)
- [Bureau of Economic Analysis \(BEA\) Regions](#)
- [Sector](#)
- [Degree-granting status](#)
- [Highest degree offered](#)
- [Institutional category](#)
- [Carnegie Classification 2015: Basic](#)
- [Degree of urbanization \(Locale\)](#) ⓘ
- [Institution size category](#)
- [Reporting method \(academic/hybrid/program\)](#)
- [Has full-time first-time undergraduates](#)
- [All programs offered completely via distance education](#)

Start by selecting the IPEDS collection year that you would like to use for choosing your institution group. By default, the most recent data year available is selected as the data collection year, as shown below:



Critical information

Changing the year will clear any selections that have already been made. The change year link is not available when creating a Comparison Group within the Customize DFR component. In this case, an EZ Group can only be generated based on the most recent universe year

Choose criteria under **Select or Special missions (if any)** for your institution group by using the checkboxes provided on screen.

Select additional criteria from the list Special Characteristics by clicking on one of the available category links. This will open the list of criteria on screen, as shown in the example below:

Special characteristics

- State or other jurisdiction** 
- [Bureau of Economic Analysis \(BEA\) Regions](#)
- [Sector](#)
- [Degree-granting status](#)
- [Highest degree offered](#)
- [Institutional category](#)
- [Carnegie Classification 2015: Basic](#)
- [Degree of urbanization \(Locale\) !\[\]\(cc729e263f29c0a76fbdc4cfe67fceb0_img.jpg\)](#)
- [Institution size category](#)
- [Reporting method \(academic/hybrid/program\)](#)
- [Has full-time first-time undergraduates](#)
- [All programs offered completely via distance education](#)

Check all | Uncheck all [Close](#)

- Louisiana
- Maine
- Maryland
- Massachusetts
- Michigan
- Minnesota
- Mississippi
- Missouri
- Montana
- Nebraska
- Nevada
- New Hampshire
- New Jersey

Where applicable, click on the  icon to learn more about a specific category. Within each category, you may select the entire list of criteria by clicking **Check All** to or clear any selections you have made and start again by clicking **Uncheck All** . When you are done selecting criteria for a special characteristic, click Close to save your entries.

Any categories that you have selected criteria from will remain highlighted in orange. You may reopen the list of criteria at any time to change your selections.

If you have selected a Comparison Institution for the current report, the characteristics in each category that match the Comparison Institution are highlighted in orange and bolded for easier selection. In addition, a general summary will be present at the top of the screen, as shown below:

University of Maryland-College Park

- IPEDS ID: 163286
- College Park MD (Mid East)
- Public, 4-year
- Degree-granting, primarily baccalaureate or above
- Title IV participating institutions
- Research Universities (very high research activity)
- Enrollment size: 20,000 and above



Key Terms: Comparison Institution

A Comparison Institution, while not required, can be selected for most reports in the Data Center. This feature allows you to highlight an institution in a report and compare its variable values with those of a user-selected or system defined peer group.

As you select various criteria, they will display in the **Criteria Summary** box at the bottom of the screen for your reference, as shown in the example below. In addition, the system will automatically update the number of matching institutions in your potential institution group as you work. This count of institutions matching the selected characteristics will display next to the Clear and Search button, as shown below:

30 institution(s)

Select

- First Look Universe **i** Title IV participating **i** U.S. only All institutions

Special missions (if any)

- Historically Black College or University Tribal College Land Grant Institution

Special characteristics

- [State or other jurisdiction](#)
- [Geographical region](#)
- [Sector](#)
- [Degree-granting status](#)
- [Highest degree offered](#)
- [Institutional category](#)
- [Carnegie Classification 2010: Basic](#)
- [Degree of urbanization \(Locale\) **i**](#)
- [Institution size category](#)
- [Reporting method \(academic/hybrid/program\)](#)
- [Has full-time first-time undergraduates](#)
- [All programs offered completely via distance education](#)

Check all | Uncheck all [Close](#)

- Administrative Unit
- Public, 4-year or above
- Private not-for-profit, 4-year or above
- Private for-profit, 4-year or above
- Public, 2-year
- Private not-for-profit, 2-year
- Private for-profit, 2-year
- Public, less-than 2-year
- Private not-for-profit, less-than 2-year
- Private for-profit, less-than 2-year

Criteria Summary

- **State or other jurisdiction**
Maryland
- **Degree-granting status**
Degree-granting
- **Sector**
Public, 4-year or above; Public, 2-year

Finalize all selections and continue to the **My Institutions** list by clicking **Search** or erase all selections by clicking on the Clear button. If you have already selected/uploaded institutions in this function, or while working in a previous function during the current Data Center session, you will be prompted to 'Combine the two sets and eliminate duplicates', 'Keep only the institutions existing in the two sets', or 'Disregard the previous set and keep this one'.

The list of selected institutions will display on the **My Institutions** screen and the number of selected institutions will update on the status bar. You can add more institutions to this list by clicking on the By Names or UnitIDs link to search again, or by using one of the other available options from the Select Institutions toolbar, as shown below:

1. Select Institutions | 2. Select Variables | 3. Output

My Comparison Institution - University of Maryland-College Park **i**

Select Institutions - You have selected 29 institution(s)

How would you like to select institutions to include in your data file/report?

By Names or UnitIDs By Groups By Variables By Uploading a File

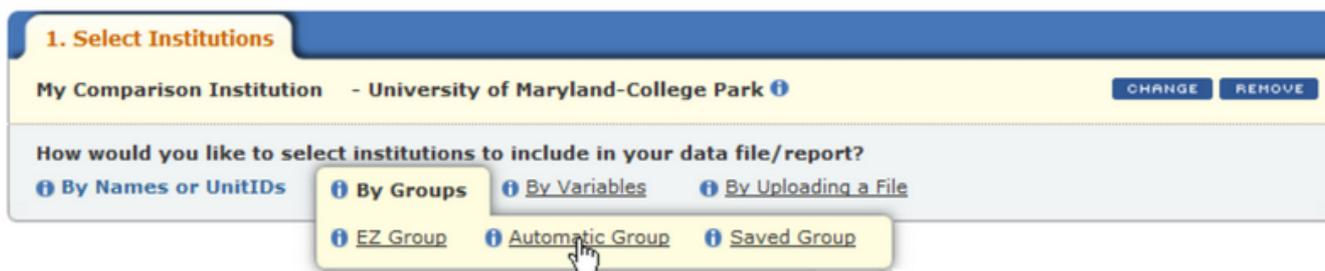
The **VIEW/MODIFY** button on the status bar can be selected at any time to make changes to the list of selected institutions.

When selecting institutions by using the **Create, Save, or Upload institutions** shortcut, you may click on the **EXPORT** button to download your list.

1.3.2 Automatic Group

Use this option to select the automatic peer group for an institution as developed by NCES. The Automatic Group option will be available only after a Comparison Institution for the current task is selected.

To utilize this option, place your cursor over the By Groups option then click on Automatic Group, as shown below:



The system will automatically compile a list of peers for the selected Comparison Institution and add them to the My Institutions list for the current report. If you have already selected/uploaded institutions in this function, or while working in a previous function during the current Data Center session, you will be prompted to 'Combine the two sets and eliminate duplicates', 'Keep only the institutions existing in the two sets', or 'Disregard the previous set and keep this one'.

The list of selected institutions will display on the My Institutions screen and the number of selected institutions will update on the status bar. You can add more institutions to this list by clicking on the By Names or UnitIDs link to search again, or by using one of the other available options from the Select Institutions toolbar, as shown below:



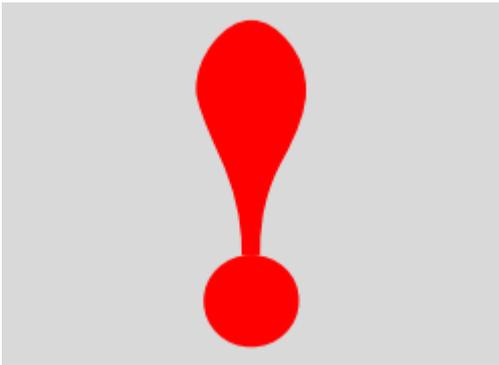
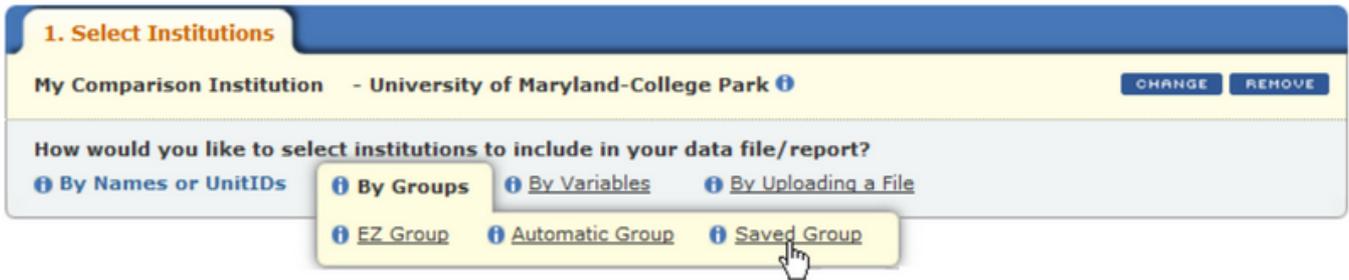
The **VIEW/MODIFY** button on the status bar can be selected at any time to make changes to the list of selected institutions.

When selecting institutions by using the **Create, Save, or Upload institutions** shortcut, you may click on the **EXPORT** button to download your list.

1.3.3 Saved Group

Similar to the **Automatic Group** option, the **Saved Group** option allows you to load a saved institution group for a

selected Comparison Institution defined by the institution itself.

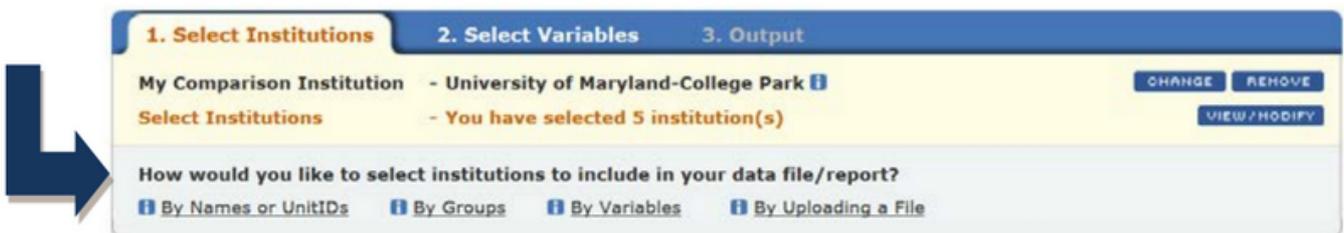


Critical information

Saved Groups are not available for all institutions. If a Saved Group is not available for the specified Comparison Institution, a message will appear prompting you to select another means of creating an institution group

If you have already selected or uploaded institutions in your current Data Center session, you will be prompted to 'Combine the two sets and eliminate duplicates', 'Keep only the institutions existing in the two sets', or 'Disregard the previous set and keep this one'.

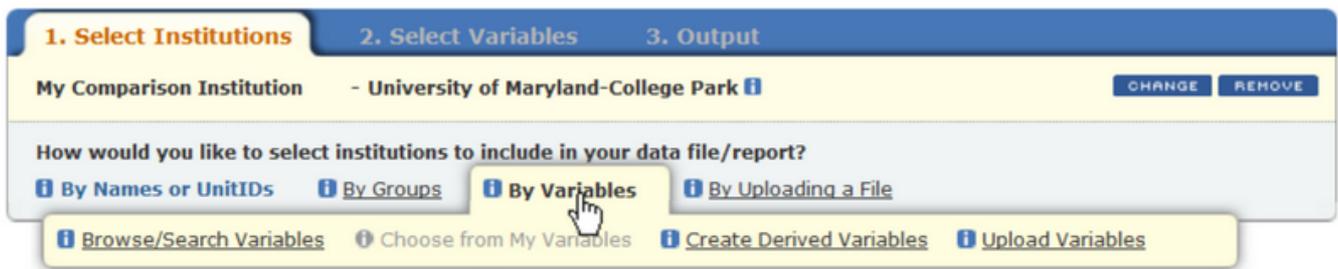
The list of institutions will display on the My Institutions screen and the number of selected institutions will update on the status bar. On this screen you have the option to select another method of adding institutions from the Select Institutions toolbar or modify the current list, as shown below:



1.4 Selecting by Variables

The By Variables method allows you to search for institutions using any IPEDS variable or combination of variables. For example, you can access this option to select all institutions in the state of California with a total enrollment of more than 10,000 students.

To access this option, place your cursor over the By Variables link from the Select Institutions toolbar, as shown below:



Start by choosing the variables that you want to use to define your institution group using one of the methods outlined below. If you have already selected/uploaded variables for a previous function during the current Data Center session, your existing My Variables list is displayed. Up to 20 variables can be selected to use as criteria for creating an institution group.

Browse/Search Variables

Browse the IPEDS Variable Tree by current year or survey, or search all variables by name or keyword.

Choose From My Variables

Choose from a list of any stored variables you have already selected and/or uploaded during the current session.

Create Derived Variables

Derive new variables using the existing IPEDS variables.

Upload Variables

Upload a saved variable list from a previous session.



Key Terms: My Variables

As you navigate the Data Center, selecting IPEDS variables for various functions and purposes, these variables are stored in the My Variables list for easy access.

Any new variables that are selected during this process will be added to the **My Variables** list, as shown below:

Select the variables you would like to use to create an institution group.



My Variables

E Edit Years **D** Delete Variable **A/D** Modify years for all variables in a file

DELETE ALL

Institutional Characteristics: Institutions		Select all	Unselect all	A/D
Year	Variable			
<input type="checkbox"/> 2006-07	Geographic region			E D
<input checked="" type="checkbox"/> 2006-07	Level of institution			E D
<input checked="" type="checkbox"/> 2006-07	Control of institution			E D
<input checked="" type="checkbox"/> 2006-07	Degree-granting status			E D

Frequently used/Derived variables: Fall enrollment/retention rates		Select all	Unselect all	A/D
Year	Variable			
<input checked="" type="checkbox"/> Fall 2006	Total enrollment			E D
<input type="checkbox"/> Fall 2006	Full-time enrollment			E D

Choose the variables for defining your institution group by clicking on the checkbox next to the variable you wish to select. Several other controls for variable list modification include the following:

E -- Select this option to edit the selected data years for a single variable. When the related pop-up screen is displayed, click on the corresponding checkboxes to select/unselect data years for the specified variable. When finished, click Save to apply these changes and return to the My Variables list.

D -- Select this option to delete the corresponding variable from the My Variables list.

A/D -- Select this option to add or delete data years for all variables from a particular section. When the related pop-up screen is displayed, click on the corresponding checkboxes to select/unselect data years. When finished, click Save to apply these changes and return to the My Variables list.

To clear all selections and start over, use the **DELETE ALL** button. When finished, click Continue.

You will be redirected to the Institution Selection Form (shown below). If a Comparison Institution for the current task is selected, the Comparison Institution Value for each variable will display on the right side of the screen, as shown below:

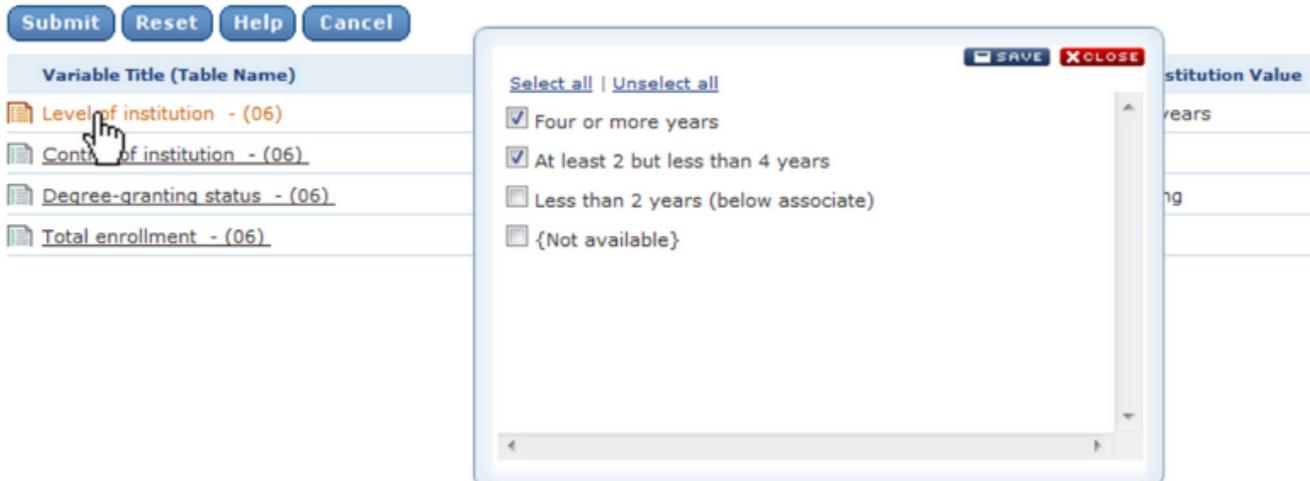
Specify the search values for each variable in order to define your institution group.

Submit **Reset** **Help** **Cancel**

Variable Title (Table Name)	Comparison Institution Value
<input type="checkbox"/> <u>Level of institution - (06)</u>	Four or more years
<input type="checkbox"/> <u>Control of institution - (06)</u>	Public
<input type="checkbox"/> <u>Degree-granting status - (06)</u>	Degree-granting
<input type="checkbox"/> <u>Total enrollment - (06)</u>	35102

On this screen you must enter a search value for each variable. Click on a variable to open the corresponding Search Value(s) pop-up screen, as shown below:

Specify the search values for each variable in order to define your institution group.



Depending on the type of variable selected, you will be prompted to enter a search value(s) in one of two ways:

- By selecting one or more values from a list of available options (as shown in the example above); or
- By entering numeric values and using operators to define the search criteria. Numeric entries must be in the form of whole numbers and should not contain any special characters (e.g. commas, decimals, dollar signs, etc.). The only exception to this is ratio defined variables where use of a decimal point is required to enter search values.

<u>Operators</u>	
=	(equal to)
<	(less than)
>	(greater than)
<=	(less than or equal to)
>=	(greater than or equal to)
RANGE	(a range between two values)

For example, you may select the \geq operator and enter 10000 to locate institutions with a total enrollment greater than or equal to 10,000 students, as shown below.

Specify the search values for each variable in order to define your institution group.

[Submit](#) [Reset](#) [Help](#) [Cancel](#)

Variable Title (Table Name)	Comparison Institution Value
Level of institution - (06) (selected 2 values)	Four or more years
Control of institution - (06)	
Degree-granting status - (06)	
Total enrollment - (06)	

[SAVE](#) [X CLOSE](#)

Total enrollment

Please input the desired value(s)

greater than or equal to

= **<** **>** **≤** **≥** **≠**

[Range](#)

When the search values for a particular variable have been entered, click **Save** to save the entries and close the pop-up screen. Repeat this process for each of the variables in the **Institutions Selection Form** . Reopen the **Search Value(s)** window for any variable at any time to modify the selections.

Once you have specified search values for each of the variables in the Institutions Selection Form, click Submit. Any institutions that match the specified criteria will be added to the My Institutions list for the current task. If you have already selected/uploaded institutions in this function, or while working in a previous function during the current Data Center session, you will be prompted to 'Combine the two sets and eliminate duplicates', 'Keep only the institutions existing in the two sets', or 'Disregard the previous set and keep this one'.

1.5 Selecting by Uploading a File

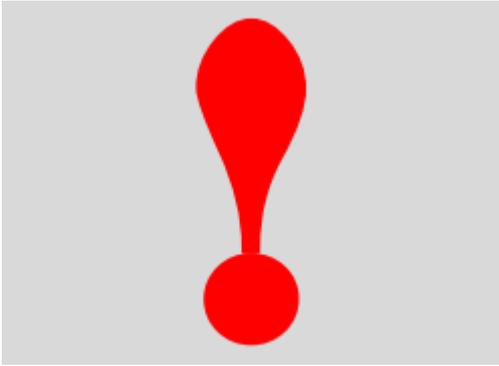
If an institution group was previously created and saved, it can be retrieved at any time by clicking on the **By Uploading a File** link from the **Select Institutions** toolbar, as shown below:

1. Select Institutions 2. Select Variables 3. Output

My Comparison Institution - None Selected [f](#) [ADD](#)

How would you like to select institutions to include in your data file? [f](#) [?](#)

[f](#) **By Names or UnitIDs** [f](#) **By Groups** [f](#) **By Variables** [f](#) **By Uploading a File**



Critical information

A Power User account is required to upload Variable List files to the Data Center. Click on the link to Login, and then enter the User Name and Password when prompted. To obtain a Power User account click on Login then click the link to Create an account.

Once you have logged in, retrieve the file by entering the complete path and filename in the box provided, as shown below; or use the **Browse** button to locate the file on your computer's hard drive. Institution group files will have a filename extension of **.uid**.

Once the file is selected, click Submit to upload the saved institution group. If you have already selected or uploaded institutions for your current task, or while working in a previous task during the current Data Center session, you will be prompted to 'Combine the two sets and eliminate duplicates', 'Keep only the institutions existing in the two sets', or 'Disregard the previous set and keep this one'. The uploaded institutions will automatically be added to the My Institutions list for the current task.

Upload File

You can upload any institutions file that you have downloaded from our site before. These files will have ".uid" extensions. Please note: if you have made any modifications to any of these files since downloading them, the system will reject them.

Enter file name:

Step 2: Modifying the Institution Group

As institutions are selected, they will be added to the **My Institutions** list. The institutions in this list are stored throughout the current Data Center session for use with any generated data files or reports. Add more institutions to the list at any time by clicking on one of the available options under the **Select Institutions** tab.

To make changes to the list, click on the Modify button at the top right of the displayed list; then use the corresponding check boxes to select the institutions to keep or remove using the following options to finalize your selections:

Keep Selected

Using the checkboxes provided, select the institutions to keep in the institution group; then click on Keep Selected. Any institutions that have not been selected will be removed from the list.

Remove Selected

Using the checkboxes, identify any institutions to remove from the institution group; then click on Remove Selected to delete them from the list.

Remove All

Select this option to delete all of the existing institutions from the institution group.

Step 3: Downloading the Institution Group

You may download the institution group in zipped, .uid format. To do this, select the **Create/Download institution group** option from the **Main Menu** ; then, from the **My Institutions** view, click on **Export** . This is shown below:

1. Select Institutions

My Comparison Institution - None Selected **ADD**

Select Institutions - You have selected 9 institution(s) **VIEW/MODIFY**

How would you like to select institutions to include in your data file/report?

By Names or UnitIDs **By Groups** **By Variables** **By Uploading a File**

When you have finished selecting institutions, you may **EXPORT** your institutions to (.uid) file.

The browser will walk you through the file save process. The filename extension for the saved institution group will be **.uid** .