A guide to reporting in eVision

Version 3.8
Table of Contents

1 Introduction ................................................................................................................................. 4
   1.1 Intended Audience ....................................................................................................................... 4
   1.2 Pre-requisites ............................................................................................................................... 4
   1.3 Objectives .................................................................................................................................... 4
   1.4 Conventions .................................................................................................................................. 4
2 Accessing and Navigating eVision ................................................................................................. 5
   2.1 Introduction .................................................................................................................................. 5
   2.2 Accessing eVision ......................................................................................................................... 5
   2.3 Navigating eVision ....................................................................................................................... 8
   2.4 Access and Support ...................................................................................................................... 9
   2.5 Logging out of eVision ................................................................................................................... 9
3 Accessing and Running Dataviews and Reports .......................................................................... 11
   3.1 To access Dataviews and Reports: ............................................................................................... 11
   3.2 Running a Dataview or a Report .................................................................................................. 12
      3.2.1 Dataview and Report Layout .............................................................................................. 15
      3.2.2 Exporting results .................................................................................................................. 16
   3.3 Best Practice When Running Dataviews and Reports .................................................................... 16
4 SDMA Report Catalogue ................................................................................................................. 17
5 Further Help & Information ........................................................................................................... 18
   5.1 Student Systems Support Centre (SSSC) .................................................................................... 18
   5.2 Education IT Programme (Edu IT) ............................................................................................ 18
   5.3 Data Protection ............................................................................................................................ 18
6 Document Information .................................................................................................................... 19
1 Introduction

The purpose of this manual is to provide guidance on how to login to eVision, navigate around, locate and run Dataviews or reports.

1.1 Intended Audience

This manual is designed for all users of eVision who require information about cohorts, individual students or to complete operational processes.

1.2 Pre-requisites

- Knowledge of University of Oxford terminology
- Basic web browser knowledge
- Basic knowledge of using a computer, keyboard and mouse.

1.3 Objectives

On completion of this manual, you will be able to:

- Login to and navigate eVision
- Locate and run Dataviews and reports

1.4 Conventions

- Indicates additional useful information.

- Indicates an important piece of information, take particular care to read this information.

- Indicates there is something that you should not do, take particular care to read this information.

**Bold Text** Indicates menu names.

*Italic Text* Indicates window, screen or dialogue box titles.

[F4] Keys on your keyboard are indicated in **bold text** enclosed in square brackets [ ].

**File > Open** Moves through a navigation path are indicated with a >. In this case you would click on the **File** menu, then select **Open**.
2 Accessing and Navigating eVision

2.1 Introduction

eVision is the web based view of the SITS:Vision student record system. It is used by academic and administrative colleagues and by students (referred to as Student Self Service).

SITS:Vision is the underlying application used by central teams in the Academic Administration Division.

Staff and students can access eVision from any internet browser using their University Single Sign-On. SITS:Vision and eVision are supported on all major browsers (although Mozilla Firefox is the recommended browser for running Dataviews) including:

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</tr>
<tr>
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<td>Latest (recommended for Dataviews)</td>
</tr>
<tr>
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<tr>
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<td>Latest</td>
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<tr>
<td><img src="image" alt="Apple Safari" /></td>
<td>Latest (excluding Microsoft Windows, as Apple are no longer developing Safari for Microsoft Windows)</td>
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* N.B. Dataviews and reports require the disabling of the pop-up blocker for the eVision site. Unfortunately, Safari does not allow per site configuration, therefore it is ***strongly recommended*** that Mac users install a third party browser (e.g. Chrome or Firefox), which allow more nuanced configuration of their respective pop-up blockers.

For further information on Single-Sign-On go to [http://help.it.ox.ac.uk/webauth/oxfordusername](http://help.it.ox.ac.uk/webauth/oxfordusername).

2.2 Accessing eVision

To login to eVision:

1) Open your preferred web browser.

2) Enter the web address [http://www.admin.ox.ac.uk/studentsystems/](http://www.admin.ox.ac.uk/studentsystems/). The Student Systems Support Centre page is displayed.
3) Click on the eVision link in the Login links section in the bottom right corner of the page. The Webauth (single single-on) Log in page is displayed.

4) Enter your single sign-on username and password and then click on the **Login** button. A confirmation message is displayed.
5) Click on [Continue to evision.ox.ac.uk] to display the eVision Home screen.
2.3 Navigating eVision

The eVision Home screen consists of four main sections:

- **Accessibility, Cookies & Privacy and Logout** – details relating to navigation including accessibility, use of cookies and the logout function are located in the top right corner of the page.

- **Main Menu** – from the Main Menu at the top of the page you can access the main areas of eVision. The items listed will vary according to the requirements of your role and level of access.

- **Staff Notices** – notices relating to system availability and new functionality are displayed in the centre of the page.

- **Supporting Materials** – notices and links to new or updated supporting materials are located on the right of the page.

- **Support Contact Information** – if you have any queries regarding the system, contact details are displayed at the bottom of the screen for staff and students. Links to related systems are also listed here.

To access an area of eVision from the Main Menu:

1) Click on an item in the Main Menu at the top of the page e.g. **Access and Support**.
2.4 Access and Support

The Access and Support area consists of two sections:

- **Gaining Access to Student Systems** – this section provides guidance on how to request additional access to eVision and other student systems, as well as a link to a list of Information Custodians who manage eVision access. From here you can also view your current eVision access permissions.

- **Student Systems Access and Support** – from here you can find links to details relating to system availability and other news relating to student systems generally. Links to training materials are also listed, as well as useful resources such as frequently asked questions.

2.5 Logging out of eVision

To logout of eVision:

1) Click on the **Logout** button in the top right corner of the page. A system message is displayed confirming that you have logged out of eVision.
2) Click on the **Proceed with Single Sign-On Logout** link. A University of Oxford Single Sign-on Logout page is displayed.
3 Accessing and Running Dataviews and Reports

In order to access eVision Dataviews or reports you will need to have the appropriate permissions assigned to your login. This is managed by your Information Custodian.

When you have the appropriate permissions, the Dataviews or other menu item(s) will appear in the Main Menu at the top of the page.

You will also need to ensure that your preferred browser supports pop ups. For further guidance on this, please contact your local IT Support in the first instance as the steps vary according to the type and version of browser you are using.

3.1 To access Dataviews and Reports:

1) Access eVision.

2) Click on the Dataviews link in the Main Menu at the top of the page. The Reporting for staff screen is displayed. The Dataviews are grouped under four main headings: Admissions and Enrolment; Examinations and Assessments; On-course Students (including historic records) and Other Dataviews.
3) Alternatively, click on the relevant link in the Main Menu at the top of the page (e.g. Student Records). The reports displayed will depend on your access permissions. An example is below.

3.2 Running a Dataview or a Report

1) Click on name of the Dataview or report you wish to run e.g. the Submitted Graduate Applications Dataview. The Microsoft Reports Screen is displayed

   ![Microsoft Reports Screen](image)

   **Note:** Click on the icon next to name of the Dataview or report to view a brief description.

   ![Submitted Graduate Applications](image)

   Provides full details of each graduate application record.

2) Select and enter the relevant parameter values to restrict the report to those records you are interested in. The parameters listed will vary according to the purpose of the Dataview or report selected. As a general rule of thumb, try to use as many parameters as possible to reduce the amount of time it takes to bring back the relevant data.

   **Note:** At least one field identified with an asterisk needs to be populated.
A few other points to note are:

- **User Role** – in the *All Students Disability Dataview* you will need to choose a User Role (i.e. College, Department or Super User) before selecting some of the other mandatory parameters. This is to restrict your access to only those college(s) or department(s) you belong to. Super Users have a choice of either college or department parameters.

- **UAB/Department/College data** – in some Dataviews you will notice that the UAB / Department or College parameter will automatically default to your own. However, in most cases your view of the data is not restricted to your UAB / Department or College and alternative values can be selected.

- **Date format** – you will notice that in some Dataviews the values for some date fields defaults to 1/1/1900 12:00:00 AM. If this is the case, they should not be changed unless you want to use them to restrict the report. To use this parameter, click on the Calendar icon and select a date. It will appear in the field in dd/month/yyyy format e.g. 20/Nov/2015.
Accessing and Running Dataviews and Reports

- **Parameter lists** – the behaviour of parameter lists vary depending on their purpose. Some lists may be context sensitive and only show the options relevant to an earlier selection, for example when a particular Division has been selected, only the Departments in that Division will be displayed. Some lists support multi-selection, whereas with others you can only select one option. However, all lists are searchable by using the *Filter* box at the top of the list. See examples below.

- **Display Columns** – this option appears in some reports and allows users to select the columns of data they want to include in the results.

  ![Parameter List Example]

  ![Display Columns Example]

  **Note:** In some Dataviews and reports more details are visible in the downloaded report than when viewing on screen e.g. programme information in All Students Dataview.

a) To select a value from a parameter drop down list, you can either scroll down the list or use the filter box to find the value of interest.

b) If multiple values are supported, untick ‘All’ or click ‘Uncheck All’ and then tick the checkboxes next to relevant options.

  ![Parameter List Example with filter]

  ![Display Columns Example with filter]

  **Note:** At any point you can reset your search parameters back to the default, by clicking on the *Reset Report Parameters* button at the bottom of the page.

3) Click on the *Run Report* button at the bottom of the page. The results will appear in a new ‘Report Viewer’ Tab.

  ![Run Report Button]

  **Note:** the first time you use Dataviews or reports, your pop-up blocker *may* prevent the new tab from opening. Chrome and Firefox will offer you a prompt to allow pop-ups for the eVision address – other browsers may require additional manual intervention.
3.2.1 Dataview and Report Layout

Dataviews are divided into three sections:

- **Control Bar** – used to navigate the report, return to parent list and export the data.
  - **Navigation** is achieved through the arrows highlighted in red. The inner arrows take you to the previous / next page, the outer to the first / last.
  - **Return to Parent Report**: the arrow highlighted in orange will only be ‘active’ when you are viewing a drill-through report showing individual student data (see below). Clicking this arrow will return you to the list view you came from.
  - **Export**: the majority of Dataviews and reports are designed to export the on-screen records into an Excel file for further analysis. In some cases, this will provide additional detailed information (e.g. Programme Group, Award Programme and Specialism title) which is suppressed on-screen to reduce the requirement for scrolling.

- **Search Parameters** – the parameters used to run the Dataview or report are displayed at the top of the page, as well as the date the Dataview or report was run, who by and the total number of rows (records) returned.

- **Results** – the main section consists of a row for each application, student or other types of records depending on the nature of the report. Usually, 25 records are displayed on each page.
3.2.2 Exporting results

To export the report details:

1) Select and run the required Dataview or report.
2) Click on the drop arrow next to the Export icon on the Tool bar at the top of the page.

3) Select the format in which you wish to export the Dataview or report from the drop down menu. Excel is the recommended option for most Dataviews and reports. Depending the type of browser you are using, you will then be asked if you want to Open or Save the export.

Note: Not all reports have the option to download in all formats.

When exporting results, the first tab of the excel spreadsheet (or first page in other formats) will display the University’s conditions for using applicant and student data (Data Supply Conditions), the second tab will display the parameters used to generate the report (Parameters) and the third tab will show the results.

If exporting individual applicant or student details, separate tabs will be created for the different tabs in the report itself.

Note: Some reports have the option of downloading direct to Excel without needing to view on screen first e.g.

3.3 Best Practice When Running Dataviews and Reports

If you wish to run a Dataview or report for an individual student, it is recommended that you use the ‘View Student’ report on the Student Records tab or the ‘Individual Student Search’ now available on the Dataviews tab. Whilst it is possible to search for individual students on other Dataviews, these purpose built reports generally run faster.

If your Dataview or report is timing out, please make sure that you have entered as many parameters as possible and that you allow at least five minutes for the process to be run before attempting to run the report again. Please be aware that refreshing and re-running any Dataview or report more frequently than this can lead to performance issues.
4 SDMA Report Catalogue

To find out more about the range of reports which are available please see the SDMA Report Catalogue.

5 Further Help & Information

5.1 Student Systems Support Centre (SSSC)

The Student Systems Support Centre (SSSC) provides guidance and assistance with the use of the University’s student systems and associated business processes. Guidance and further information about eVision can be found on the Student Systems Support Centre website:

http://www.admin.ox.ac.uk/studentsystems/

5.2 Education IT Programme (Edu IT)

The Education IT Programme (Edu IT) is responsible for delivering the development of Oxford’s IT-based systems used by academic and administrative staff, applicants and students in support of many aspects of teaching and learning. Further information about the programme can be found at:

http://www.admin.ox.ac.uk/aad/studentsystems/programme/

5.3 Data Protection

You should familiarise yourself with the University’s policy on Data Protection by reading the information available at:

http://www.admin.ox.ac.uk/councilsec/compliance/dataprotection/

Further information about the Data Protection Act can be obtained from the website of the University’s Data Protection Officer:

http://www.admin.ox.ac.uk/councilsec/compliance/dataprotection/policy/

All university members should adhere to the following regulations when using IT facilities:

http://www.admin.ox.ac.uk/statutes/regulations/196-052.shtml
6 Document Information

This document is subject to change, please ensure you have the latest version.

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