



User Guide for the ILDS – Illinois Higher Education Information System (HEIS)



No statistics found for the school, displaying global statistics

Students Enrolled in year 2012 by Race



White Asian Black or African American Two or more races
Unknown race and ethnicity Hispanic

My Profile

- Change Password
- Change Personal Information
- Change your Address
- Change your Organization information
- Change Security questions/answers

File Upload History

There are no files available for this institution.

Data Submission Portal

<https://www2.ibhe.org/web/lds-public/>

Helpdesk

217-557-7384

IHEIS@ibhe.org

Change History

Change Date	Description
5/27/16	submission information updated
6/9/16	initial guide sent to users

Registration

An institution can have multiple users. One will be the primary administrator for the institution. This individual will have access to data previously submitted by the institution as well as current submissions. Since this data contains personally identifiable information for students at the institution it is important that we take extra steps to ensure that users are properly authorized to access this data. Therefore we are requiring the signature of the institution's president or chancellor or similar figure of authority on an authorization form generated by the system before we approve the account of a primary administrator. Although we recognize this creates a burden for staff at both the schools and IBHE, we feel it is a necessary one to assist in the protection of this sensitive data.

Other users may register from an institution and the primary administrator has the responsibility of determining the access privileges of any additional users. Primary administrators are also responsible for the closure of another user's account should that user leave the institution or change positions such that access is no longer warranted. The primary administrator or any other staff member should notify IBHE if there is any concern regarding unauthorized access or any activity associated with a user's or administrator's account that is suspicious.

Accounts will automatically expire on a periodic basis and a new authorization form will be required at that time for the Primary Administrator.

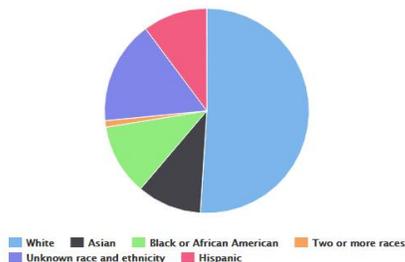
Please do not share log in information with other staff. Anyone who is to access the system should have their own credentials. Please be aware that there are both state and federal laws regarding this data and any suspicious activity linked to your account, regardless of whether you were the person that committed any wrong-doing, could warrant prosecution. If the role of Primary Administrator (PA) needs to change from one staff member to another, the new PA should register with a new account instead of using the credentials of another person.

To register as a Primary Administrator, please go to: <https://www2.ibhe.org/web/lds-public/>



Contact Us >>

Students Enrolled in year 2012 by Race



For Returning Users

Username

Password

Login

Forgot Username? Forgot Password?

OR

New Users Signup

OR

You have enrolled before but don't have credentials to connect. Please contact Support

1. On the initial registration page, select your school and please be sure to select the box for Primary Administrator. (User is the default option.)

Organization & Role

What is your Organization type IBHE Institution

Select Institutions & Roles

Institute	Primary Administrator	Administrator	User
<input type="checkbox"/> Adler School of Professional Psychology	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Ambria College of Nursing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> American Academy of Art	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> American College of Education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> American InterContinental University-Online	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Argosy University-Chicago	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Title

2. After submitting your contact information you will be directed to an authorization form that you can print or save to your computer. Please download or print the file now as you will not be able to access it again when you leave this screen. A sample form is included in the appendices of this user's guide.

New User Registration

Application Received

Thank You for registering with us.

We have received your request for access to <http://lds.ibhe.org> site with user-Id "AdlerAdler" for following institution(s):
Adler School of Professional Psychology (020681) : Primary Administrator

Since the primary user will be able to view the data for your institution, it is vital that we ensure the primary user is properly authorized by their college or university. Therefore, please have your institution's President/Chancellor/CEO or other appropriate institutional administrator sign the Primary User Authorization Form and submit it to IBHE.

 **Approval for Richard for Primary Administrator Role**

You can send us the signed for form by any of the following methods

Email : mayer@ibhe.org
Fax : 217-782-8548 (Attn : Shawna)
Mail : Shawna
Illinois Board of Higher Education
1 N. Old State Capitol Plaza, Suite 333
Springfield, IL 62701

Once your form has been received and reviewed, you will be notified regarding the status of your application.

If you have any questions, please email us at mayer@ibhe.org or contact us at 217-557-7337.

Thanks
IBHE LDS Team

[Continue to Main Website](#)

3. Have the document signed by the President or other appropriate administrator. This indicates that the person attempting to register as the Primary Administrator for your institution is authorized to have access to this sensitive data.

4. Once the form has the necessary signature, you'll submit it to IBHE via email, fax, or regular mail (Instructions are on the form).
5. IBHE staff will approve your registration and you'll receive an email notification. (Please allow us at least a day for processing.)

Updating Your Profile

If you would like to update your password, personal information or security questions you would go to the Home tab.

On the Home tab there is a section called My Profile. From there you can click on the links below.



Managing Users and Roles

To manage users, hover your mouse pointer over the LDS Administration drop down box and click on Users & Roles.

If you are the Primary Administrator you will see all the users that are set up for your school. As mentioned before if you'd like to add a user they can sign up through the new user signup process mentioned on page 6.

If you'd like to change a user's role click on their name.

The screenshot shows the top navigation bar of the IBHE Data System Portal. On the left is the IBHE logo with the tagline "Promoting an Educated Illinois" and "ILLINOIS BOARD OF HIGHER EDUCATION". In the center, it says "Illinois Longitudinal Data System Portal". On the right, a user is logged in as "David Smalley, Primary Administrator" with a "Logout >>" button and a "Last Logon: 06/07/2016" timestamp.

Below the navigation bar is a dark purple menu with the following items: Home, File Upload, Reports, LDS Administration ^, and a partially visible "Users & Roles" item.

The "Users & Role Management" section is active, showing a dropdown menu for "IBHE". Below this is a table with the following data:

	Name	Status	E-mail	Phone	Role	Activation Status	Membership Validity
1	User Fred	Active	Fred@email.com		Primary Administrator	Enabled	06/07/2018
2	David Smalley	Active	smalley@ibhe.org		Primary Administrator	Enabled	05/17/2018
3	Eric Lichtenberger	Active	lichtenberger@ibhe.org		Primary Administrator	Enabled	08/20/2017
4	Corey Hankins	Active	hankins@ibhe.org		Primary Administrator	Enabled	05/27/2018
5	Shawna Mayer	Active	mayer@ibhe.org	2175577384	Primary Administrator	Enabled	07/23/2017

At the bottom of the table, there is a pagination control showing "Page 1 of 1".

On the screenshot displayed below you can see your User Account Status and you can edit the role of that user. A Primary Administrator needs to be set up as mentioned in the Registration portion.

If you want to change the role to an administrator there will be three options for their privileges. As a primary administrator you can choose the appropriate option for each user.

File (Administration) & User (Administration)

File (View) & User (View)

File (Administration) & User (View)

Setting the role to User will only allow the user to view the files.

PII Access can be set to Yes or No. All PII information will be restricted for the given user if you select NO for the user.

If you would like to disable this users account you can click on Disable the user will no longer have access to the system once the change is saved.

FTP Access is discussed on Page 14.

The image shows two screenshots of a web application interface. The top screenshot, titled "User Account Status", displays user information for David Smalley. The bottom screenshot, titled "Organization & Role of David for IBHE (999999)", shows configuration options for the user's role and access.

User Account Status	
Name	David Smalley
Title	Associate Director
E-mail	smalley@ibhe.org
Contact Number	2175777337
User Id	dsmalley
User Status	Active
Member Since	05/17/2016
Last Logon	06/07/2016

Organization & Role of David for IBHE (999999)	
* Role	<input type="radio"/> Primary Administrator <input checked="" type="radio"/> Administrator <input type="radio"/> User
* Privileges	<input type="radio"/> File (Administration) & User (Administration) <input type="radio"/> File (View) & User (Administration) <input type="radio"/> File (Administration) & User (View)
* PII Access	<input type="radio"/> Yes <input checked="" type="radio"/> No
* Activation Status	<input type="radio"/> Enabled <input type="radio"/> Disabled <input type="radio"/> Inactive
* FTP Access	<input type="radio"/> Yes <input checked="" type="radio"/> No

Buttons: Save, Cancel

Data Submission

To begin the process of submitting your data chose “File Upload” from the menu bar across the top of the screen.



File Upload History

Four buttons are located above the table: "+ Upload File", "+ Create File", "Refresh", and "Guidelines & Samples".

Name	Type	Format	Collection Year	Collection Cycle	Status	Uploaded By	Last Update At	View Logs
------	------	--------	-----------------	------------------	--------	-------------	----------------	-----------

You will see a history of previously submitted files and, depending on your access privileges, be able to open and view previously submitted data.

You will also see four buttons to assist you in facilitating the submission process. The Guidelines & Samples section contains the data dictionaries for the two file types, Enrollment and Graduation. You will also find sample templates you can view, download, and/or print.

There are two buttons from which to choose when submitting data. If you are reporting for a small institution and/or do not have a system that can assist you in compiling the data very easily then you may want to use the “Create File” button as this option allows you to manually enter the data for each student.

Otherwise you will click on “Upload File” to proceed to the next step of the submission process which opens the following screen;

File Upload History

+ Upload File

+ Create File

Refresh

Guidelines & Samples

Upload File for CENTER FOR PSYCHOANALYTIC STUDY (400012)

*Collection Year: 2015

*Collection Cycle: 1 2 3 4

*Type: Enrollment Graduation

*Format: EXCEL XML CSV

*File: Browse...

Upload Cancel Note: It may take up to 24 hours to process your file.

The collection year refers to the set of guidelines currently in use, not the year of the data being submitted. For example, the current collection of data from 2013, 2014, and 2015 is based on the 2015 guidelines so you will see 2015 as the only option in this drop down menu for this year. As additional elements are added in future years, or definitions change, additional guidelines will be added to choose from in this drop down menu.

Collection cycle is a tool we can use to manage the data collection process. The system has been set up to acknowledge only one file per cycle as the official submission for that cycle, and that file is the last one submitted by the institution. There was an issue with the previous collection at NCSA where schools sometimes submitted multiple files and NCSA or other staff did not know which one to treat as the official submission to be promoted to production. Therefore we have set this system to only acknowledge the most recent submission as the official one once it validates without error.

Since we are asking for data going back to 2013 and collecting up to the present, you will need to decide if you prefer to create one Enrollment file and one Graduation file for all relevant terms to be submitted all at once or to create smaller files with each year included in a separate collection cycle. Since there are four collection cycle options, you can break your data out into four or fewer batches for Enrollment and four or fewer batches for Graduation.

If you attempt to submit two or more different Enrollment files in the same cycle, the system will only acknowledge the last one submitted.

Once we have finished getting the data collection caught up to the present term, we will roll out a more regular collection schedule and set these cycles accordingly.

Next you need to indicate which type of file you are submitting, Enrollment or Graduation, and choose the appropriate file format. Recall there are sample layouts available for each file

format under the Guidelines & Samples button. The ‘2015’ within the naming convention refers to the year of the submission requirements, as opposed to the actual year of enrollment or completion data.

Naming Conventions

For enrollment files: The file name needs to include ‘**Enrollment**’ along with the collection year.

For example: **isacuniveristy_enrollment_2015**.

For graduation files: The file name needs to include ‘**Graduation**’ along with the collection year.

For example: **isacuniversity_graduation_2015**.

Once you have selected all of the appropriate buttons you can then upload your file. The File History section of the page should update to show you have submitted a file and you will notice that it has been placed in a status of “Queued.”

While freshly submitted files will stage and validate right away, a file that is updated via the online portal will be validated that night, not immediately. So please be patient.

After processing, you will receive an email notifying you as to whether the file was validated with no errors or whether there were errors that need to be addressed. The system processes the entire file and identifies all errors instead of stopping after the first error as the previous system did. The status of the file will also update within the File Upload History section of the site. Here is a list of the different status types you may see in the File Upload History and what they mean:

Status	Meaning
Queued	You have uploaded a file and it has not been processed yet.
Errors Found	The file was processed and errors were found.
Superseded	This file was submitted earlier but a newer file was submitted in the same collection cycle so this older file will no longer be used in the system.
Validated	The file was processed by the system and no errors were found.

What's next? If you have a validated file and you believe that is the final file, you are done. We will use that file at the end of the collection to populate our databases.

Any file that was processed, regardless of the status, will have a log that provides some details about the file. In the case of validated files the log will indicate how many records were processed. If errors were found, the log will have the list of errors. A file that was superseded will still show the error log so you will be able to see what errors existed in previous submissions.

	Center for Psycho Enrollment	Enrollment		2015	3	Errors Four	psycho	2015-11-24		
	Center for Psycho Enrollment	Enrollment		2015	1	Supersede	psycho	2015-11-24		
	Center for Psycho Enrollment	Enrollment		2015	1	Supersede	psycho	2015-11-24		
	Center for Psycho Enrollment	Enrollment		2015	1	Validated	psycho	2015-11-24		

The notification email you receive after a file has been processed also provides some information to assist you in analyzing the file you submitted to determine if the data look reasonable.

	Undergraduate	Graduate
Female	1	0
Male	2	0
Not Selected	0	0
Black or African American	0	0
American Indian or Alaska Native	0	0
White	0	0
Native Hawaiian or Other Pacific Islander	0	0
Hispanic	1	0
Nonresident Alien	0	0
Unknown race and ethnicity	1	0
Asian	1	0
Two or more races	0	0

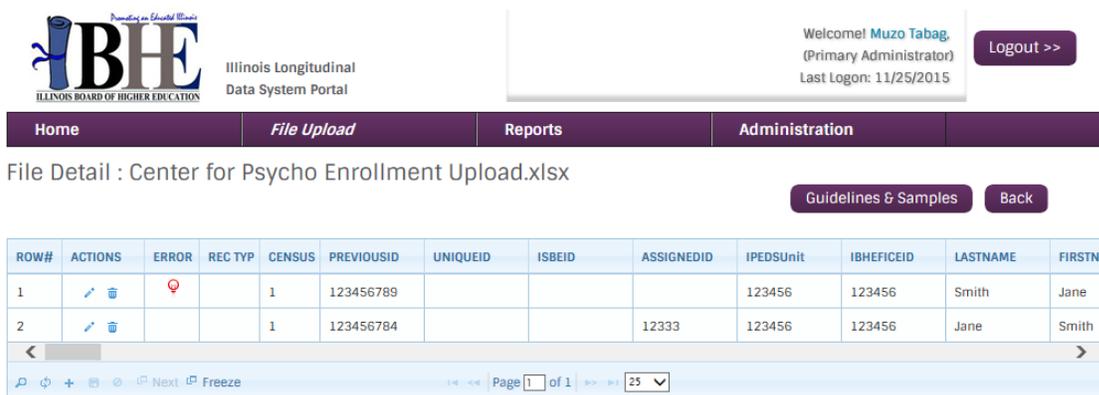
The chart above shows an example of the summary statistics that were provided for a file containing records for three undergraduate students. The email text also indicates whether the file contained errors or was validated. If errors were found, the error log will be attached to the email so you can share it with any staff without having to log in to the system to retrieve it.

Data Submission Tips

- If using Excel make sure the data is in the first sheet.
- Remove the column headers prior to submission. Although it is a fairly easy fix within the editing tool (deleting the first row), it causes file churn and slows down the file validation process.
- If you don't have the specific piece of data, just leave it blank. Don't create dummy global ID numbers such as 9999999999.
- If you are uploading a CSV file, check the four literal major fields for commas. We found that replacing commas with backslashes was an easy fix.
- If you are using Excel, don't format the date fields as dates, format them as text.
- If you are using Excel, be sure to format the fields that could have leading zeroes as text fields, such as zip code, high school ID, and the institutional IDs.
- If you are using Excel, format the name fields as text, or there is a potential for formatting issues. If a name happens to be one of the logic functions in Excel (i.e., last name True) it causes a strange carriage return, which results in an error.

Correcting Errors

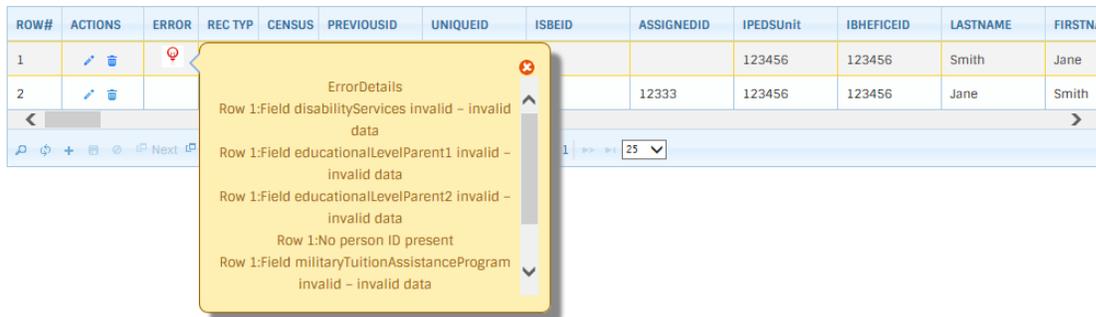
There are two ways you can correct errors listed in the log. One is to modify your file and re-submit it. However, you also have the option to make corrections to the data within the system and may prefer this method if there are only a few errors to address. Clicking on the  icon on the right side of the File Upload History table will open the data for editing and review within the system. Users who do not have PI (personal information) privileges will not see those fields.



The screenshot shows the Illinois Board of Higher Education (IBHE) Data System Portal. The user is logged in as Muzo Tabag, Primary Administrator. The interface includes a navigation menu with options like Home, File Upload, Reports, and Administration. The current view is 'File Detail : Center for Psycho Enrollment Upload.xlsx'. Below the navigation is a table with columns for ROW#, ACTIONS, ERROR, REC TYP, CENSUS, PREVIOUSID, UNIQUEID, ISBEID, ASSIGNEDID, IPEDSUnit, IBHEFICEID, LASTNAME, and FIRSTNAME. Two rows of data are visible, with an edit icon in the ACTIONS column for the first row. A 'Logout >>' button is present in the top right corner.

ROW#	ACTIONS	ERROR	REC TYP	CENSUS	PREVIOUSID	UNIQUEID	ISBEID	ASSIGNEDID	IPEDSUnit	IBHEFICEID	LASTNAME	FIRSTNAME
1	 			1	123456789				123456	123456	Smith	Jane
2	 			1	123456784			12333	123456	123456	Jane	Smith

A balloon icon under the ERROR column will be seen in every row that contains an error. Clicking on that balloon icon will open a display that lists the errors for that row.



There are two icons under the ACTIONS column. The trash can simply deletes the entire row while the pen icon opens the row for editing.



Notice that the pen icon has now changed to a diskette icon while the row is open for editing. When finished with any needed edits, clicking the diskette icon then closes the row while saving any changes that were made to the data.

Once you have made any changes to the file it will then be listed as queued once again and will process overnight. Likewise, if you choose to submit a new file with corrections it will also be queued for processing overnight.

Going back to a previous submission

If for some reason the latest validated file is not one you would like to use, but would rather use a previous “superseded” file you can go in and edit that superseded file and it would become the latest file if it meets validation requirements.

Program Inventory

Once we start collecting current data, the system will be connected to a static version of the program inventory (PI). The PI in this system is manually updated a few times a year and tied to the collection schedule. Of course, changes to the program inventory occur every week so there will be some “errors” in matching to the program inventory due to the timing of changes that are made. In the future, you will be able to contact us if you require assistance in resolving CIP code error issues.

Uploading Larger Files via SFTP

Secured File Transfer Protocol (SFTP): The portal was only developed to upload files smaller than 4 MB; therefore, files 4 MB or larger are required to be uploaded using secured file transfer protocol (SFTP). If you try to upload a file larger than 4 MB via the portal, you will receive an upload error message and will be provided with a link to the SFTP portal. However, before institutions are able to upload larger files via SFTP, the FTP access must be changed.

Privilege for SFTP access: is granted through the user security module under *Organization & Role*

The screenshot shows a configuration page for 'testf for ADLER UNIVERSITY (020691)'. The page has a blue header and a white content area. The configuration options are as follows:

- Role:** Primary Administrator, Administrator, User
- Privileges:** File (Administration) & User (Administration), File (View) & User (Administration), File (Administration) & User (View)
- PII Access:** Yes, No
- Activation Status:** Enabled, Disabled, Inactive
- FTP Access:** Yes, No

At the bottom, there are 'Save' and 'Cancel' buttons. A red circle highlights the 'Yes' radio button for 'FTP Access', with a red arrow pointing to it.

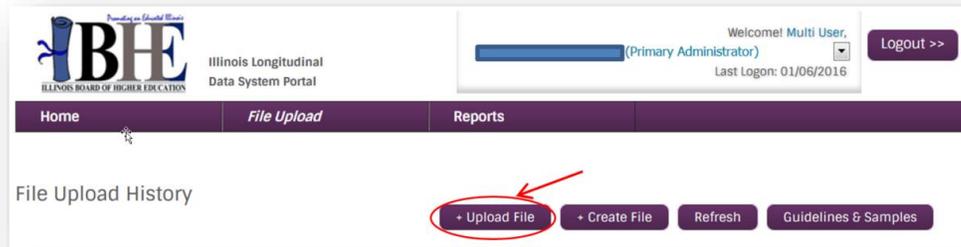
This privilege can be administered during user registration either by institution administrator or IBHE. The same can be done for existing users by change function under *Organization & Role*.

Files upload process through IBHE portal & SFTP:

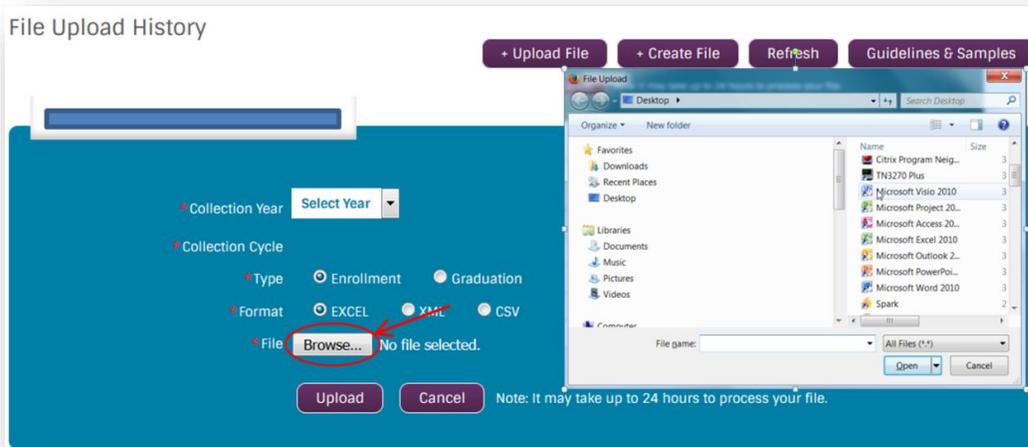
The institutions can upload files up to 4 MB through the portal using the below work flow



- Step 1: Select **File Upload** to get to Upload File process

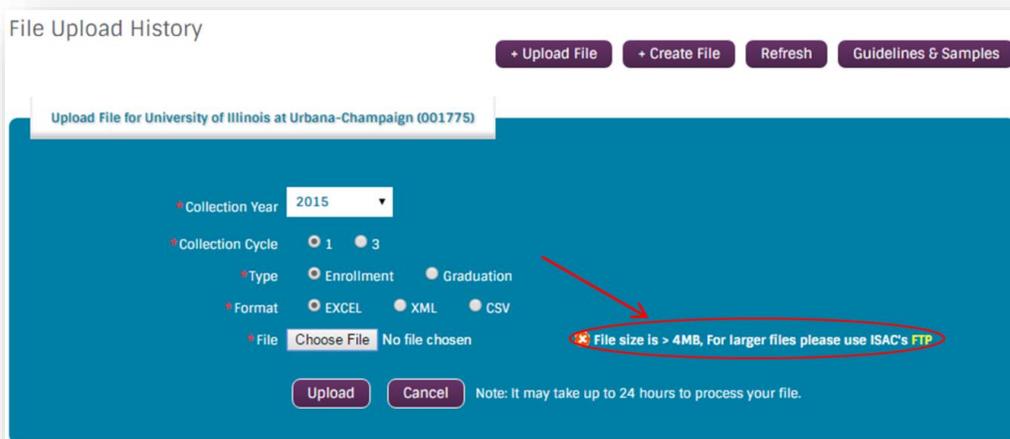


- Step 2: Select **Upload File** to get to File selection function



IBHE portal will be able to upload a file size up to 4 MB. Once you click on Upload the file will be submitted and will show up in your file upload history.

For file sizes larger than 4 MB, the following error message is displayed with the option to link to secured FTP site. <https://transfer.isac.org/webclient/Login.jsf>



Click on the **FTP** link <https://transfer.isac.org>

The link will be opened in a separate window.

Note: The link also be accessed directly by typing <https://transfer.isac.org> in a browser address

ISAC
Illinois
Student
Assistance
Commission

LOGIN

User Name

Password

Interface ? Enhanced
 Basic

By clicking the Login button you acknowledge that you have read the [disclaimer](#).

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The users should use the same credentials that are used in the IBHE portal. The interface should be **Basic**.

Select your school folder

ISAC
Illinois
Student
Assistance
Commission

Logged in as: joe123
Last Login: Never
[Logout](#)

Inbox File Manager

FILE MANAGER - BASIC INTERFACE

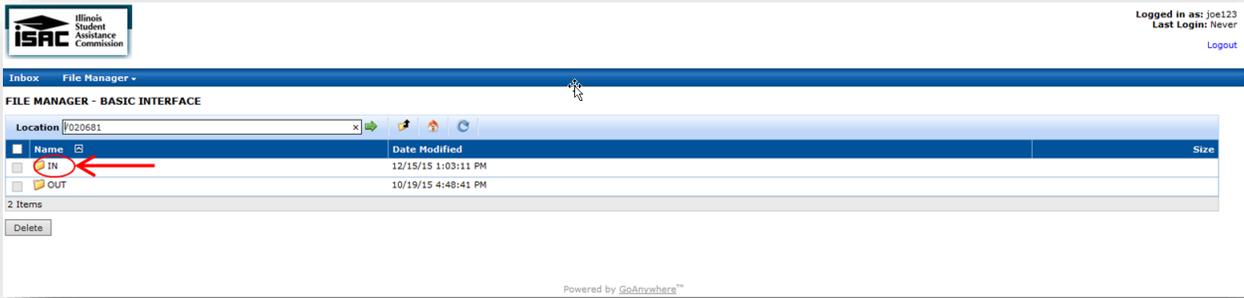
Location

Name	Date Modified	Size
020668	10/26/15 10:06:38 AM	

1 Items

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Select the IN folder



Click on upload button



A pop up window will appear to enable the file upload.

The following is important regarding the naming convention for files to be uploaded via SFTP.

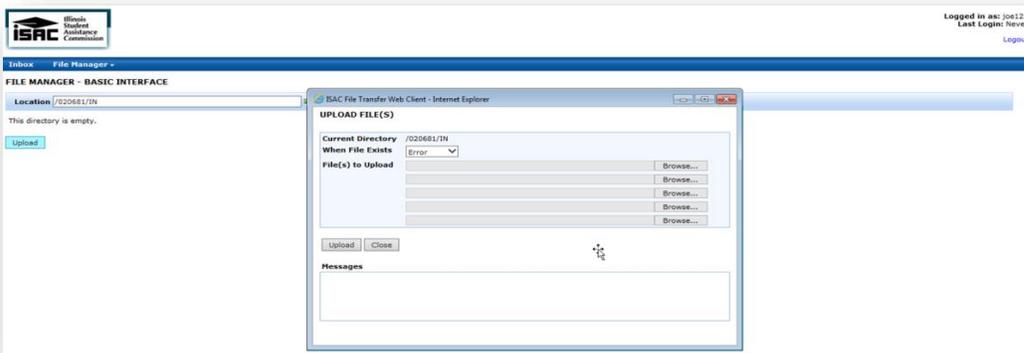
If you are uploading an enrollment file via SFTP, the file name needs to include 'Enrollment' along with the collection year. Once again, the collection year refers to the year in which the submission requirements were developed, not the year in which the data are being collected.

For example, **isacuniveristy_enrollment_2015cycle1**.

If you are uploading a graduation file via SFTP, the file name needs to include 'graduation' along with the collection year.

For example, **isacuniversity_graduation_2015cycle1**.

Same as with the online upload screens you will need to choose which cycle so that those files can be treated separately.



Select the file to upload from the pop up window and click upload button within the pop up window. A success message should be displayed in the message area of the pop up window as below

If the file is uploaded successfully it will get processed within 24 hours.

Once the file is processed you will be able to return to the ILDS portal to see if the file has validated and edit the file if needed. <https://www2.ibhe.org/web/lds-public>