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**Texas Association for Institutional Research  
2015 Summer Workshops**

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**W1 - More Demands but Less Stress: Practical ways to Work More Efficiently and Effectively**

Abstract: IR Staff faces increased demands from year to year, and it is important to meet the demands with positive outcomes and outstanding customer satisfaction. Working efficiently and effectively will help you survive the storms - peak periods of data requests, overlapping deadlines, and staff turnover - and ever increasing reporting demands. This presentation will provide practical examples of tracking and responding to data requests, gathering and organizing data for surveys, creating internal/external reference documents, and developing a procedures manual. The results will help IR staff produce more work in less time with less stress.

Presenter: Dr. Ruby Stevens-Morgan  
*Room 3336*

**W2 - Excel for Beginners**

Abstract: Microsoft Excel is a very useful tool for anyone in Institutional Research. This workshop is for the novice user who would like to go beyond cut and paste. We will cover several formulas as well as pivot tables and graphing. This presentation is based on Microsoft Excel 2010.

Presenter: Chris Daley, Trinity Valley Community College  
*Room 2330*

**W3 - I have this awesome tool (Tableau) ... Now what?!**

Abstract: The University of the Incarnate Word has been using Tableau since 2009 and the arrival of the new Institutional Research Team, and we have been asked a lot of questions by other IR offices over the years. This workshop will step through many of these questions and address our use and adoption of various Tableau products, including Desktop, Public, Reader and Server. We will share our lessons learned during adoption, design guidelines for developing dashboards, checklist for training community users, and a few other considerations. Participants in this session will engage in conversations centering on these "lessons learned" and will leave with materials and examples, not to mention a network of other Tableau users.

Other considerations may include:

Permission considerations, publishing/distributing, report shelf-life, extracts vs. live connections vs. published data sources, organization of server environment, storage of report shells and supporting documents, security considerations, administration of the server environment, cycle of updates, and designing data sources.

This workshop is about the planning needed to successfully adopt and use this awesome tool, so beginning and advanced users are welcome.

Bring your own laptop. Materials will be made electronically available to registered participants.

Prerequisites: Must bring a laptop with Tableau loaded on the machine.

Presenters:

Robin Logan, University of Incarnate Word

Dru Duos, University of Incarnate Word

*Room 3338*

#### **W4 - Section 508 accessibility for electronic publications**

Abstract: Texas state law requires that all state agencies and public institutions of higher education in Texas make all of their electronic publications accessible according to standards laid out in the Americans with Disabilities Act, Section 508. Agencies and institutions who do not meet these standards are discriminating against disabled people, and may be subject to lawsuits!

Whether you are a supervisor who wants to ensure your agency or department is meeting Section 508 standards, or a creator of content who needs technical accessibility guidance, this workshop is for you. Bring a laptop and we will give you hands-on exercises to teach you how to make the following products fully accessible:

- Web pages (HTML/CSS)
- Adobe PDF documents
- MS Office documents (Powerpoint, Word, Excel)

In addition, we will offer accessibility best practices for ALL forms of publication, including print and multimedia, and provide you with generic templates to help you with internal accessibility testing.

Presenter:

James Tanner, Texas Workforce Commission

*Room 3340*

#### **W5 - Intermediate Excel**

Abstract: This hands-on presentation will demonstrate several of the most frequently used features of Microsoft Excel within the context of Institutional Research. Intermediate-level topics will include working with pivot tables, t-tests and regression. Also demonstrated will be concatenate, v-lookup, working with filtered data, using workbooks side-by-side, and other time-savers. Participants are encouraged to bring questions

Presenter:

Lisa Haynes, Texas Woman's University

Yvonne Pringle, Texas Woman's University

*Room 2330*

## **W6 - I have this awesome tool (Tableau) ... Now what else?!**

Abstract: This workshop will build upon the morning session, but we will cover more of the nuances about using Tableau to deliver reports to your community -- things that could cause great happiness or heartache. We will explore the question "Why would I want to..." reshape survey data, use tooltips, use hierarchies, build groupings in my script rather than in Tableau, hide unused fields, develop crosswalks, worry about underlying data, build action filters, review dashboard sizes and printing options, use or hide tooltips, ponder naming conventions, and other topics." We will share examples of our existing reports and work through a few examples using Tableau Desktop.

This workshop is about additional ways to help you use this awesome tool, so beginning and advanced users are welcome.

Bring your own laptop with an installed copy of Tableau Desktop. Because Tableau 9 has been newly released, we will send an update to registered participants about the version we will be using, as well as other materials to be used in the workshop.

Prerequisites: Must bring a laptop with Tableau loaded on the machine.

Presenters:

Robin Logan, University of the Incarnate Word  
Dru Duos, University of the Incarnate Word  
*Room 3338*

## **W7 - Effective Presentations**

Abstract: Communicating information in an effective manner has always been a key requirement for institutional researchers, but communication skills are now even more important as we have become more involved in "telling stories" about our data and creating data visualizations. This workshop will focus on principles of design for slides, graphs and charts, to help you more effectively communicate your message in your reports and professional presentations.

Presenters:

Susan Thompson, Texas State  
Phil Rhodes, McLennan College  
*Room 3336*

## **W8 - SAS Beginners and Stats for Rookies**

Abstract: In this workshop, you will learn the basics for SAS Programming. You will learn how to import data to SAS, export data out of SAS, connect to data resources using SAS, the basics of data manipulation using a SAS data step, the basics of reporting using Proc Tabulate, Proc Freq, Proc Report and the Output Delivery System (ODS), and briefly discuss the SAS Macro Language . In addition, we will discuss the flexibility of SAS as an IR tool.

Presenter:

Colby Stoeber, University of Texas Health Science Center  
*Room 3340*