STU 050: UDW+ Student Ad Hoc Reports Training

2015 Version 2.0
Program Services Office & Decision Support Group
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Create New Analysis

1. Select **New** from the Header section.
2. Choose **Analysis**.

This brings you a list of available **Subject Areas**. Subject Areas group similar data elements together that answer specific business questions. These are granted to users based on security access and role. The following Student Subject Areas may be available to you, as well as sample questions that each can answer:

- **SIS - Class Enrollment**: use this subject area to view class detail and student detail for any class that has had enrollment activity.
  - How many students does a department enroll including the total in its cross-listed courses?
  - How has enrollment in a course varied between fall and spring semesters?
  - How many graduate courses have fewer than five students?
  - In which courses do freshmen get the lowest grades?

- **SIS - Degrees**: use this subject area to count students in a given degree.
  - Is the number of master’s degrees conferred increasing or decreasing?
  - Are more women getting doctoral degrees in STEM fields?

- **SIS - Term Registration**: use this subject area to count students who are term activated.
  - What are the 10 largest minors?
  - How do a department’s minors’ average GPA compare to majors’?
  - What is the academic and demographic profile of students studying abroad in France?
  - How many students entered a school as external transfers in fall 2010? In what majors?

- **SIS – Test Scores**: use this subject area to view test scores for students.
  - What test scores were reported for a particular student?
  - What is the average score reported for test by component?
  - What was a lowest and highest score received by student?
  - How many students took tests within a specific date range?

- **SIS – Class Meeting Pattern**:

**Note:** There is no school based restrictions on Student data. Based on NYU Policy, authorized users (currently in the Beta phase) who have completed FERPA training are able to see another school’s student academic and enrollment information.

3. Select **SIS - Class Enrollment** subject area.
Criteria Tab

Title of currently opened request (by default this analysis is “Untitled”).

Data elements are stored in an expandable/collapsible tree. Click the plus signs to expand a branch, and the minus signs to collapse it.

- **Facts** are Business Measures. Facts are things that are counted, aggregated, or that allow other mathematical calculations or analyses. Examples include Headcount, Position Open Count, Position Filled Count.

- **Dimensions** are entities that describe how facts are analyzed. They are attributes of facts. Examples include accounts, faculty, student, programs, department, time period, and location. Using dimensions allows you to bring context to the facts.

Selected Columns are where your data elements go.

Filters are used to filter specific elements.

Save and Save As icons to save your analysis.

Catalog displays your saved filters.

Data Elements: Expand a folder by clicking the plus sign, then either double-click or drag and drop the data element into the “Selected Columns” area.
Key Fact (Measurement) and Dimension (Attribute) Definitions

Class Enrollment: view class detail and student detail for any class that has had enrollment activity

Facts
Class Enrolled Headcount: counts # of students currently enrolled in a course
Class Total Headcount: counts # of students who “touched” a course (enrolled, de-enrolled, waitlisted, or dropped at one point in time); will always be equal to or greater than “Class Enrolled Headcount”

CPP
Primary Plan: student’s primary academic plan
Plan
Plan Type: major approved, major unapproved, minor, non-primary major
Program
Career: Graduate, Undergraduate, professional schools separated out (SCPS, Law, Medicine, Stern Grad, Dentistry)

CPP>CPP/Organization subfolder
Plan Academic Organization: org that owns the plan
Student Plan Reporting Department: shows dept for a student’s plan, regardless of plan type

Plan Academic Group

Student Organization: focus is on the STUDENT
Student Academic Group: student’s school of registration, or break-down within a school. used in Brio dashboards. e.g. College of Arts and Science
Student School: student’s school of registration and in some cases the same as Student Academic Group. e.g. College of Arts and Science, Graduate School of Arts and Science, Liberal Studies
Student Reporting School: in some cases the same as Student School. aggregates Student Reporting Departments. e.g. Faculty of Arts and Science

Student Academic Organization: generally the student’s academic department. e.g. Biology
Student Reporting Department: in some cases the same as Student Academic Organization. Categorizes students in the Reporting Department taxonomy included in all the components of UDW+ to permit the consistent assignment of financial, human resources and student data to departments. e.g. Biology and Genomics

Degree
Degree Level: type of degree, e.g. Undergraduate, Graduate, Non Credit, Professional
Degree Sub Level: e.g. Masters, Doctoral, Bachelors, Associates, Non Matric

Student Class Attributes
Class Enrollment Status: Enrolled, Dropped, or Waitlisted
Final Grade: shows “W” for withdrawals
Class Drop Date: Date student dropped the class. Defaults to 1/1/1753 if student did not drop.

Course
Subject/Number/Title: concatenation of the Subject Code, Catalog Number and Course Title.
Catalog Number: the number student sees in the course catalog
SIS Course Number: from PeopleSoft/Albert/Campus Solutions
**Course Level:** Graduate or Undergraduate

**Minimum and Maximum Points:** can be used for variable credit courses

**Course> Organization:** focus is on the COURSE (similar to “Student Org” definitions)

**Course Academic Group:** course’s school of registration, e.g. Graduate School Arts

**Course Academic Organization:** generally the course’s academic department, e.g. Biology

**Course Org Reporting Department:** e.g. Biology and Genomics

**Class**

**Combined Status:** if the course is a Sponsor, Non-Sponsor, or not combined “-”

**Class Section:** Numerical section, e.g. 001

**Section Type:** if the course is a Lecture, Lab, Recitation, Independent Study, etc.

**Class Enrollment Type:** identifies which of the class sections is used for enrollment and non-enrollment

**Combined Classes**

**Sponsor Academic Organization:** shows the dept that sponsors the class. (every course is sponsored by one dept. but can still be located under two different depts.)

**Combined Class Subject/Number/Title**

**Student**

**Full Name; SIS ID**

**Term**

**Term, Term Type, Academic Year** (Fiscal Year)

**Term Registration:** counts students who are term activated

**Facts**

**Distinct Student Count:** # of students who registered (enrolled, maintain matric, de-enrolled, not enrolled)

**Registered Headcount:** # of students who enrolled

**CPP**

**Primary Plan, Career, Plan, Program**

**Plan Academic Organization:** org that owns the plan

**Plan Academic Group**

**Student Term Attributes**

**Registration Status**

**Student Organization**

**Student Academic Group:** student’s school of registration, or break-down within a school

**Student Academic Organization:** generally the student’s academic department. e.g. Biology

**Degrees:** counts students in a given degree

**Facts**

**Degree Awarded Count:** counts # of students to whom a degree was awarded; totals distinct by person and degree (not plan). Each person shows "1" for each plan, but the aggregate will only count degrees deferred.

**Degree Revoked Count**

**Degree Total Count**
Class Enrollment

Training Scenario #1: Find the Departments within the College of Arts and Science, for a term.

1. Locate and add the following data elements:
   - **Term Folder**
     - Term
     - Term Code
   - **Student Organization Folder**
     - **Student Academic Group**: student’s school or a break-down within a school (used in the Brio dashboards)
     - **Student Academic Group Code**
     - **Student School**: student’s school and in some cases the same as Student Academic Group.
     - **Student School Code**
     - **Student Academic Organization**: generally an academic department. Identifies the departmental unit to which the student's Primary Plan is assigned in Campus Solutions.
     - **Student Academic Organization Code**
     - **Student Reporting Department**: in some cases the same as Student Academic Organization. Categorizes students in the Reporting Department taxonomy included in all the components of UDW+ to permit the consistent assignment of financial, human resources and student data to departments.

   Other data elements in the Student Organization folder:
   - **Student Reporting School**: in some cases the same as Student School. Aggregates Student Reporting Departments.

Filters

In almost all cases, you wouldn’t want your query to return data from every record in the database. To limit that data, you add filters to your queries. To create a new filter on a given data element, hover over the three lines and click the Filter icon on the drop down menu for that element.

2. Create a filter where Term = Fall 2014
3. Create a filter where **Student Academic Group** = College of Arts and Science
4. Click on the **Results** tab.
Results Tab
The Results tab will display all rows that match your search criteria.

5. Review the listed departments and note that:
   ● The Student School may/may not be identical to the Student Academic Group.
   ● Student Reporting Department may/may not be identical to the Student Academic Organization.

Compound Layout: shows the Table view and Title view by default. Additional views may be added such as Pivot Tables, Graphs, Gauges, Maps, etc. and will be covered later in this class.

Icons for viewing:
   ● Format Container = change alignment, colors, border styles, etc.
   ● Editor = provides options to edit
   ● Remove = removes given view from compound layout

Subject Area= data elements columns can be added directly to a view on the Results tab by double clicking or dragging and dropping.
Catalog= displays your saved filters.
Views= A list of all created views, which may be added or removed from the Compound Layout. By default, Title and Table already exist.
Rows= Displays the first 25 rows. You may view the next 25 rows by clicking the single downward arrow, or view up to 500 rows by clicking the double sided arrow.

Training Scenario #2: View the list of courses that the Mathematics’ students (within the College of Art and Science) took in the Fall 2014.

6. Return to the Criteria tab.

7. Create a filter where Student Academic Organization = Mathematics.

8. Add the data element Subject/Number/Title from the Course folder.

Other data elements in the Course folder:
   Catalog Number: what the student sees in the course catalog
   SIS Course Number: from PeopleSoft/Albert/Campus Solutions
   Course Level: Graduate or Undergraduate
   Minimum and Maximum Points: can be used for variable credit courses

9. Run the Results. You will see all of the courses that the Mathematics’ students are taking (which include Math, among many others, which may be from other schools).
Training Scenario #3: View a list of courses that the Mathematics Department offered in the Fall 2014.

Delete a Filter
10. Return to the Criteria tab.

11. **Delete** the Student Academic Organization filter and the Student Academic Group filter. Hover over the filter for the data element you would like to delete, and click on the red X.

12. **Add** the following data elements from the Course > Organization folder:
   - Course Academic Group
   - Course Academic Group Code
   - Course Academic Organization
   - Course Org Reporting Department

13. Create a filter where **Course Academic Organization** = Mathematics.

14. **Run Results.** The results will show the Courses that are offered by the Mathematics Department, as well as the students’ information (for those students that are taking Mathematics courses).

Rearrange Columns
By default, UDW+ will group columns together by their folder structure. You can **rearrange** the columns by dragging and dropping them.

15. **Grab** the Course Academic Group column by hovering above its name until you see the multidirectional arrow over the tab on the top.

16. **Drag** it and position it to be the first column (until you see a light-blue line to the left) and then drop it.

17. Repeat steps for **Course Academic Group Code**, **Course Academic Organization**, **Course Org Reporting Department** and **Subject/Number/Title** so they follow.

Save Analysis
1. **Save** the created analysis by clicking the Save icon. The Save As option is also available should you wish to save an analysis under a different name or location.

2. Go to My Folders, create a new folder by clicking the New Folder icon.

3. Name this folder “Training”.

4. In the new Training folder, save the analysis as “Math courses”.

5. Click OK. Note that the name of the analysis and title have been changed.

Catalog
In the Catalog section, you can open, edit, copy, rename, and perform a variety of other actions accessed through the “More” dropdown option.

6. To **access** your saved analyses, click on Catalog in the header row.

7. Expand My Folders by clicking on the + sign.

8. Find your “Training” folder.

9. Find your analysis and click Edit.
Training Scenario #4: View a list of courses that the Mathematics Department is sponsoring (that have had enrollment activity), as well as courses that the Mathematics Department is offering enrollment in (regardless if they are the sponsor), for a term.

1. Create a **New Analysis** and select **SIS - Class Enrollment** subject area.
2. **Add** the following data elements:
   - **Sponsor Academic Organization**: (Combined Classes folder) shows the dept that sponsors the class (every course is sponsored by one dept. but can still be located under two different depts)
   - **Combined Class Subject/Number/Title**
   - **Subject/Number/Title** (Course folder)
   - **Course Academic Organization** (Course > Organization folder)
   - **Combined Status**: (Class folder) if the course is a Sponsor, Non-Sponsor, or not combined “-”
3. Create the **filters**:

   **Add a Filter without its Column**
   If you want to filter on a data element, but don’t want the column to appear in the query results, you can add a filter without adding the column. In this scenario, the **Term** column does not need to be displayed in the results, and the rows do not need to be repeated. Yet the filter is necessary for the analysis.
   - Go to the “Filters” toolbar and click on the **Filter** icon.
   - If desired column is not listed in the drop-down list, click **More Columns...** at the bottom.
   - Select **Term** and click **OK**.
   - **Term** = Fall 2014
   - Click **OK**.

   **Note:** Another way to add a filter without the column would be to: add the desired column, create the filter from the column, and then delete the column.

4. Create **Filter** for:
   - **Sponsor Academic Organization** = Mathematics
   - **Course Academic Organization** = Mathematics

   **Using the ‘OR’ operator on a Filter**
   You can change the filter operator from ‘**AND**’ to ‘**OR**’. Start with the inner most filter, click on ‘**AND**’ connector where it has to be converted to ‘**OR**’ and it automatically converts into ‘**OR**’ and creates a group. Always click on the operator which is in between two filters that make up a group.

5. Run **Results**
Training Scenario #5: View enrollment headcount for courses that are offered and sponsored by the Mathematics Department.

**Analysis with Figures**

6. Directly in the Results tab, **add** the following **facts** from the Class Enrollment Facts folder:
   - **Class Enrolled Headcount**: counts # of students currently enrolled in a course.
   - **Class Total Headcount**: counts # of students who “touched” a course (enrolled, de-enrolled, waitlisted, or dropped at one point in time); will always be equal to or greater than “Class Enrolled Headcount”.

Training Scenario #6: View class attributes for the class: “MATH-UA 121 Calculus I” and the headcount for each section type.

7. Return to the **Criteria** tab.

8. Create a filter where **Combined Class Subject/Number/Title** = MATH-UA 121 Calculus I.

9. Add the following dimensions:
   - **Class Section**: (Class folder) Numerical section, e.g. 001
   - **Section Type**: e.g. Lecture, Recitation, Lab, Independent Study
   - **Class Enrollment Type**: identifies which Class Section is used for enrollment. Enrollment Section or Non-Enrollment Section.
   - **Instructor Full Name**: (Instructor folder) The Instructor dimension pulls information from SIS Albert as well as HR, for ALL instructors associated with a class.
     Note: The **Primary Instructor Flag** may be filtered on “Y” to identify the primary instructor, however, this will **only pull back records where the associated instructor has been assigned the role of “Primary Instructor”**. An instructor may be labeled differently (such as Section Leader), so filtering would not pull back all accurate results.
   - **Instructor Role**: role of instructor e.g. Primary Instructor, Section Leader, Teaching Assistant

10. Run **Results**.
    **Note**: Headcount numbers may be counted more than once, due to multiple Class Sections.
        *For an accurate enrollment headcount, you must filter on Class Enrollment Type = Enrollment Section.*

11. Return to the **Criteria** tab, create a filter where **Class Enrollment Type** = Enrollment Section.

12. Run **Results**.
Training Scenario #7: View names of enrolled students in MATH-UA 121 Calculus I, and the headcount for each class section.

13. Return to the Criteria tab, and add the following dimensions:
   - Full Name (Student folder)
   - SIS ID
   - Class Enrollment Status (Student Class Attributes folder): Enrolled, Dropped, or Waiting
   - Class Drop Date (Student Class Attributes): Date student dropped the class. Defaults to 1/1/1753 if student did not drop.
   - Final Grade (Student Class Attributes> Grades folder)

14. In the Criteria tab, create a filter where Class Enrollment Status = Enrolled

15. Run Results.

Edit Mode

To Edit any view, scroll to the far right and click the Pencil icon 
. This will bring you to the Layout Pane for that view.

Layout: In the “Layout” pane of the editor, you can add totals and subtotals, change headings for data elements, exclude fields, and much more.

Prompts

You can create a prompt dropdown box within your analysis, by going in Edit mode dragging and dropping data elements into the Prompts section.

1. From the Table section, drag Instructor Full Name column and drop into Table Prompts area.

Tip: To make changes, drag fields into different sections of this pane and when you see the blue line, drop it in.

Sections

Sections will create a separate table for each option within the data element you select.

Tip: It’s a good idea to uncheck Display Results icon in the upper toolbar while modifying your analysis. This prevents the results from being displayed in the Editing section, which can improve performance.

Excluded

Columns placed in the Excluded section will not be displayed in your selected results view. These columns are still included in your criteria, but they are excluded from the selected view.

2. From the Table section, drag Class Enrollment Type, Class Enrollment Status, Class Total Headcount, and Class Drop Date columns into Excluded area.
**Totals**
Add totals on the headcounts.

3. In the toolbar for Table, click the pencil icon to edit.
4. For Class Section column, click the Sum icon and select “After”.
5. Click Done.
6. Save your analysis as “MATH-UA 121 class attributes”.

**Sorting**
Hover-over a column header to apply sorts. Click the up arrow to “Sort Ascending” or down arrow to “Sort Descending.”

**Print**
1. If you would like to print all of your rows, be sure to click on the double sided arrow at the bottom of your analysis prior to printing. If not, it will only print the first 25 rows.
2. Click the Print icon in the upper left hand corner.
3. Select either Printable PDF or Printable HTML. At this point you can print the output.
4. Close the PDF or HTML window.

**Export**
1. Click the Export icon.
2. Options:
   a. PDF
   b. Excel- Formatting will be maintained. Limited amount of rows exported.
   c. PowerPoint 2003 or 2007
   d. Web Archive
   e. Data >
      i. CSV Format (Comma Separated Values)
      ii. Tab delimited Format- Brings over the raw data (not formatting). Total row count exported. It is best practice to use Tab delimited Format when you want to analyze the data.
Practice on your own, Training Scenario #8: Create an analysis to view the enrollment trend for the past five years, for a few courses offered by your department.

1. Create a new analysis.
2. Select the SIS - Class Enrollment subject area.
3. Add the following data elements:
   - Academic Year Label: used for display (Term folder)
   - Academic Year: equivalent to Fiscal year
   - Term Type
   - Subject/Number/Title (Course folder)
   - Class Enrolled Headcount (Class Enrollment Facts folder)
4. Create the following filters:
   - Academic Year= 2011; 2012; 2013; 2014; 2015
   - Class Enrollment Type (Class folder)= Enrollment Section (add this filter without adding a column)
   - Subject/Number/Title (Course folder) or Combined Class Subject/Number/Title (Combined Classes folder) (depending on how your courses are registered) = select a few courses offered by your dept
5. Run Results.

You have completed Training Scenario #8!
Training Scenario #9: Create a Line Graph to view enrollment trend for the past five years for those courses.

**Graphs**

1. Add a **New View** and select **Graph > Line**.

   **Note the other views that are also available for selection.**

   UDW+ will attempt to create a visualization based on your data set and type of Graph selected (this almost always needs to be edited).

2. **Edit** the Line Graph by clicking on the **pencil** icon:
   - **Exclude** = Academic Year, Term Type
   - **Measures: Lines (Vertical Axis)** = Class Enrolled Headcount
   - **Line: Group By (Horizontal Axis)** = Academic Year Label
   - **Line: Vary Color By** = Subject/Number/Title

   If you wish to modify the graph properties, you may do so by clicking on the **Edit graph properties** icon.

3. Click **Done** and view your graph.

4. Save your analysis as “**Course trend**”.
Term Registration

Training Scenario #10: View the number of Steinhardt students who were eligible to register for a Term.

1. Go to New and click Analysis.
2. Select the Subject Area: SIS - Term Registration: use this subject area to count students in a given term.
3. Add the following dimensions in the order below:
   - Term (Term folder)
   - Student Academic Group (Student Organization folder)
   - Registration Status (Student Term Attributes folder)
   - Registration Status Code
   - Distinct Student Count (Term Registration Facts folder)
4. Add the following filters:
   - Term = Fall 2014
   - Student Academic Group = Steinhardt Sch Cult Ed Hum Dev
5. Run Results. In the Registration Status column, “-” means that the student is eligible to enroll, but did not.

Training Scenario #11: Create a Pivot Table that compares the Registration Status for the Fall 2014 and Fall 2013, by Steinhardt’s Academic Organization.

6. Return to the Criteria tab.
7. Add Student Academic Organization column.
8. Modify the Term filter to include Fall 2013.
9. Run Results.
Pivot Table

10. In the Results tab, click the New View icon in the top toolbar.
11. Select Pivot Table. A Pivot Table view will be added to the bottom of the Compound Layout.
12. In the toolbar for the Pivot Table, click the pencil icon to edit.

Tip: It’s a good idea to uncheck Display Results icon in the upper toolbar while modifying your analysis. This prevents the results from being displayed in the Editing section, which can improve performance.

Additional features:
   - Rows and Columns = define the pivot table’s rows and columns
   - Measures = where you put value data elements you want to appear in the pivot table

13. Make the following edits to the Pivot Table:
   a. Exclude: Registration Status Code
   b. Columns: Term (beneath the Measure labels)
   c. Rows (in the following order): Student Academic Group, Student Academic Organization, and Registration Status
   d. Measures: Distinct Student Count
   e. For Student Academic Organization, create a subtotal by clicking the Sum icon and select “After”.

14. Click Done and scroll down to view the results. You may rearrange columns and rows, to suit your data needs.

15. Delete Table view by clicking red , but keep it in Views section.
16. Save your analysis as “Registration status”.

⚠️ DO NOT re-pivot large data sets as it will crash the system.

⚠️ DO NOT press the Duplicate View button in the Views section. This will crash the server.
Practice on your own, Training Scenario #12: Create an analysis to view the Primary Plan for a specific student.

1. Go to **New** and click **Analysis**.
2. Select the Subject Area: **SIS - Term Registration**.
3. Add the following columns in the order below:
   a. **SIS ID** (Student Folder): it is recommended to use the SIS ID to search for a student
   b. **Term Code**
   c. **Term**
   d. **Primary Plan** (CPP folder)
   e. **Primary Plan Code**
4. Add the following **filters**:
   • **SIS ID** = 11293284
5. Run Results

You have completed Training Scenario #12!

Training Scenario #13: View the Career, Program and Plan for this student.

6. Return to the **Criteria** tab.
7. Add the following columns in the order below:
   a. **Student Academic Group** (Student Org folder): school that the student’s primary plan belongs to
   b. **Student Academic Organization**
   c. **Career**: (CPP folder): *e.g. Undergraduate, Graduate, professional schools separated out (SCPS, Law, Medicine, Stern Grad, Dentistry)*
   d. **Career Code**
   e. **Program**
   f. **Program Code**
   g. **Plan**: Student’s major, minor and/or secondary major
   h. **Plan Code**: more descriptive of the plan
   i. **Plan Type**: major approved, major unapproved, minor, non-primary major
   j. **Plan Academic Organization**: (CPP folder, CPP/ Organization subfolder) org that owns the plan
7. Run Results
8. Make **Term Code** a Table Prompt.
9. Save your analysis as “CPP”.~ 18 ~
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Training Scenario #14: View the number of registered undergraduate students that have Art History as part of their Plan, in Washington Square, for a specific term.

1. Go to New and click Analysis.
2. Select the Subject Area: SIS - Term Registration.
3. Add the following columns in the order below:
   a. Plan Reporting Department (CPP folder> CPP/ Organization subfolder)
   b. Plan
   c. Plan Code
   d. Plan Type: major approved, major unapproved, minor, non-primary major
   e. Degree Level (Degree folder): type of degree, e.g. Undergraduate, Graduate, Non Credit, Professional
   f. Degree Sub Level: e.g. Masters, Doctoral, Bachelors, Associates, Non Matric
   g. Plan Academic Group (CPP folder> CPP/ Organization subfolder)
   h. Plan Academic Group Code
   i. Registered Headcount (Term Registration Facts folder)
4. Add the following filters:
   - Term= Fall 2014 (does not need to show, add the filter without the column)
   - Plan Reporting Department= Art History
   - Degree Level = Undergraduate
   - Registration Status Code= “E” (Student Term Attributes folder) (add the filter without the column)
   - Student Term Home Campus= Washington Square (Student Organization folder) (add the filter without the column)
5. Run Results.
6. Save your analysis as “Art History part of plan”.
Column Properties

1. Go to Criteria tab.
2. Go to Registered Headcount column, click the drop-down menu and select the Column Properties icon.
   Column properties opens a dialog box where you can change numerous things about the appearance and functionality of the field.
   ● Style properties change the data element’s formatting, including fonts, colors, borders, and alignment.
   ● Column Format properties change the data element’s headings and value suppression settings.
   ● Data format properties allows you the change how the data element values get displayed. With numeric fields, for example, you can set the number of decimal places to display, choose to display a thousand’s separator, and define negative numbers.
   ● Conditional Format lets you set formatting when specific conditions are met.
3. Select the Style tab. Choose the Color red, Style italic, and Background yellow.

4. Select the Column Format tab.
5. To rename a column, check Custom Headings, and type in the desired name for the column.

Copy and Paste Style Format

If you want to copy and apply the style properties from one column to another:

6. Open the Column Properties window for the column from which you wish to copy the formatting.
7. On the Style tab, click the Copy Cell Format icon and click OK.
8. Open the Column Properties window for the column to which you want to apply the copied formatting and click the Paste Cell Format icon.
9. To restore the default setting and Clear Cell Format (eraser) icon.
   Note: Changes made to a column in the Criteria tab will apply to all views within the analysis. Changes made to a column in the Results tab will apply only to that specific view.
10. Save your analysis.
XML Code

Sharing XML codes is a great way to troubleshoot any issues you may be having with your analysis or sharing your analysis with another user. You may be asked to send your XML code to the DSG Analyst or another user for troubleshooting.

Obtaining and Sending XML Codes:

1. In your analysis, go to the Advanced tab.
2. Under Analysis XML, highlight and copy the entire section (Ctrl+A to select all and Ctrl+C to copy).

3. Paste it into an email send to the appropriate person.

Applying XML Codes:

If someone sends you XML code that you wish to apply:

1. Create a new analysis using any subject area.
2. Go to the Advanced tab.
3. In the Analysis XML section, delete any code that is currently there.
4. Copy the entire contents of the XML code that was sent to you.
5. Paste the XML code into the Analysis XML section (using Ctrl+V to paste).
6. Click Apply XML.
7. Go to the Results tab to run the analysis.
Degrees

In-class Assessment: Create an analysis to view the total number of degrees awarded and revoked in your school, with a major of your choosing, in the Spring of 2014. Show the breakdown between Major Approved and Non Primary Major.

Create an analysis that includes the following:

- Use the SIS - Degrees subject area.
- Columns should include but be not limited to: Student Academic Group, Plan, Plan Type, Degree Sub Level, Degree, Degree Level.
- Facts should include: Degree Awarded Count, Degree Revoked Count, Degree Total Count
- Create the appropriate filters:
  - Plan: your results will contain only those degrees where the student plan matches your filter criteria. Different filter operators can be used to get variations of a plan
  - Student Academic Group(s) or Student School
  - Plan Type: Major Approved and Non-Primary Major
  - Degree Conferred Term: Spring 2014
- Show totals for the Degree Award Count for your selected major.

Present your results to the UDW+ instructor when finished.

Congratulations! You have successfully completed the Student: UDW+ Ad Hoc Reports Training course!

Help Contact
The Decision Support Group (DSG) is here to help!

- Email: askDSG@nyu.edu
- Phone: 212-998-2900
- Web: www.nyu.edu/datawarehouse and visit the Decision Support Group tab
- DSG Knowledge Base: Dashboards → UDW+ Help → Knowledge Base Articles
  - UDW+ FAQs
  - UDW+ Functionality
  - UDW+ Training and Access
  - UDW+ System Requirements

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APPENDIX – ADVANCED STUDENT AD HOC FEATURES

1. Query with “Class Total Points Taken” or “Class Enrolled Points Taken”: If creating an analysis that looks at the “Class Total Points Taken” or “Class Enrolled Points Taken”, along with the instructor’s information, it is imperative to bring in only primary instructors in the query. If the criteria are not set to primary instructor, other roles will also be brought in and the points would be divided amongst all instructors in the query.

2. How do I create a Calculated Item?
   For example: “Change the format of a text dimension (i.e. Catalog Number), to be treated as a number for sorting purposes.”

   2.1. For the selected dimension, go to columns properties, and select “Edit formula”.

   2.2. In the Column Formula box, delete the default formula presently there.

   2.3. Add your custom formula using either the function command, Column, Variables, operators available, or type-in the formula manually.

   In this example, type in “CAST(formula for column AS INTEGER)”.

   2.4. When finished, click OK.

   2.5. Run Results, and sort on the modified column that is now treated as a number.
3. **How do you count the number of times a student has had a particular term attribute, for example how many terms a student has studied away?**
   3.1. First create a counter column. In the example below the counter has a value of 1 in terms when a student has a study away study agreement and 0 otherwise.
   3.2. If you use bins to create the counter be sure to check the box to treat the result as numeric:
   
   | 1. | Study Away Agreement Type is equal to / is in Global Programs; School Based | 1 |
   | 2. | All other values | 0 |
   
   ![Treat result as a numeric value or expression]

3.3. That gives you results like this:

   ![Table showing study away agreements and counts]

3.4. Then sum the counter variable for each student using a BY grouper to get the student-level sum:

   ![Table showing total counts]

3.5. **Notes:** Analyses like this from Term Registration should always include a Term variable to correctly identify term-based attributes. This analysis also includes the students’ SIS IDs to identify distinct students.
4. **How do I pull data for limited by the number of rows? (sql Group By/Having functionality)**

   For example: “Is it possible to filter on a calculated column in a pivot table? (e.g. count those students' previous terms and show only the students that have >= 7 terms and/or those who have <=2 terms.”

   Note: This is very handy for looking for duplicates.

   This is a three-step process:

   4.1. Create a Calculated item that counts the number of terms, using the “SUM” function:

   Use the SUM function to create a count of the rows in your query by editing a fact column. If you also want to see the fact bring the column into the analysis twice. For example the formula below will sum Registered Headcount of each N Number.

   ![Image of Column Formula](image)

   ```
   SUM("Term Registration Facts". "Registered Headcount" BY "Student". "N Number")
   ```

   4.2. Create a filter where the SUM Calculated item meets your criteria (in this example, you would need two filters, one that is >= 7 and a second filter <= 2).

   4.3. To create the “OR” statement for the two filters, click on the “AND” statement in-between the two filters and it will change to “OR” (otherwise, you will not get any results since a value cannot be both).
4.4. View the results with the sum calculated:

![Table](image)

5. **How to select multiple records for a target group of students?**

   For example: “I need to be able to select a Query Term and get that term’s information, and then pull a history of previous term information, (e.g. Identify the students who are in X academic plan for the Query Term, then get all of their previous graded enrollment terms and what their academic plan was for each of those terms, excluding any terms when their academic plan code was Z).”

This is a two-step process:

5.1. Run an analysis to identify the group you want to investigate. For example these are all the students enrolled in Spring 2015 in the Plan Arab Crossroads Studies, including their N Number:

![Table](image)

5.2. Save the analysis, as it will be referenced in the next step.

5.3. Create a second query to pull all the data you want about that group of students, and use the filter operator “is based on results of another analysis”

Note: “Is based on results of another analysis” is the last Operator listed, scroll down to see it. Use values in Column “N Number”.

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5.4. Then you can pull all the records for that group of students. The results will display as follows.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Primary Area</th>
<th>Academic Level</th>
<th>Fall 2011</th>
<th>Spring 2012</th>
<th>Fall 2012</th>
<th>Spring 2013</th>
<th>Fall 2013</th>
<th>Spring 2014</th>
<th>Fall 2014</th>
<th>Spring 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undecided</td>
<td></td>
<td>Arab Crossroads Studies</td>
<td>Freshman</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Undecided</td>
<td></td>
<td>Arab Crossroads Studies</td>
<td>Sophomore</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Undecided</td>
<td></td>
<td>Arab Crossroads Studies</td>
<td>Junior</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Undecided</td>
<td></td>
<td>Arab Crossroads Studies</td>
<td>Sophomore</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Arab Crossroads Studies</td>
<td>Freshman</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Arab Crossroads Studies</td>
<td>Junior</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Arab Crossroads Studies</td>
<td>Sophomore</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>
6. How do I avoid double counting the Class Count and Class Enrolled Headcount for two primary instructors? (Allocated Effort Example)

- Total workload is assigned to the Sponsor Section, allocated evenly between all Primary Instructors. The Subject Area also includes Instructor Allocated Points.

- You need to remove the Combined Status column in order to retrieve the correct allocated amounts.