UDW+ Student Academic Management Dashboard

Version 1.0

Program Services Office & Decision Support Group
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**Access to Student Academic Management Dashboard**

1. Registrar’s Approval. Contact your *Authorized Account Requester* to request access to **UDW+ Student Academic Management Dashboard**. The registrar will either approve or deny the request. (If you are the Authorized Account Requester, you would need to have another Authorized Account Requester request your access. Please follow the instructions at the bottom of **UDW+ Student Reporting Training and Access**. An *Account Requester Form Guide* is available for guidance.)

2. Complete *FERPA* training.

3. Complete **STU 010: UDW+ Student Academic Dashboard Training** in **NYUiLearn**, (unless you already completed another UDW+ training such as **FIN 800: UDW+ Finance Dashboards Online Training** or **Departmental Metrics in-person training**)

   Once all of these are completed, please allow three (3) business days for access to be granted. You will then receive a confirmation email containing a link to **UDW+ System Requirements**. More information can be found at: **UDW+ Student Reporting Training and Access**.

**Access to Student Ad Hoc Reporting**

1. Registrar’s Approval. Contact your *Authorized Account Requester* to request access to **UDW+ Student Academic Management Dashboard** and **UDW+ Student Data Ad Hoc**. The registrar will approve or deny the request. (If you are the Authorized Account Requester, you would need to have another Authorized Account Requester request your access. (Authorized Account Requesters: please follow the instructions at the bottom of **UDW+ Student Reporting Training and Access**. An *Account Requester Form Guide* is available for guidance.)

2. Complete *FERPA* training.

3. Complete **STU 010: UDW+ Student Academic Dashboard Training** in **NYUiLearn**, (unless you already completed another UDW+ training such as **FIN 800: UDW+ Finance Dashboards Online Training** or **Departmental Metrics in-person training**)

4. Familiarity with the UDW+ Student Academic Dashboard.

5. Register for **STU 050: UDW+ Student Ad Hoc Reports Classroom Training** in **NYUiLearn**. Your enrollment will only be approved if you have completed the above criteria.

Access will be granted within three (3) business days of completing **STU 050**. You will then receive a confirmation email containing a link to **UDW+ System Requirements**. More information can be found at: **UDW+ Student Reporting Training and Access**.
Instructions for Authorized Account Requester

2. Enter the Account Holder Information.
3. Scroll down to Reporting.
4. Select either UDW+ Student Dashboard Access and/or UDW+ Ad Hoc.
5. Submit form.

Log in/System Requirements

1. To log into UDW+, navigate to https://udwplus.nyu.edu/analytics and log with your net id and password.

Note that if you’re working outside of the NYU network, you will need to connect to VPN prior to logging in.

Data Refresh

UDW+ is refreshed overnight, every night. The refresh time and date will appear at the top of each dashboard or report in the header section as shown in the example below.
**Navigation/Catalog**

**Home Page**

The Home Page is the default start page for UDW+. It is comprised of several sections to help you find the content most useful to you.

- **Home**: to return you to the Home page
- **Catalog**: folder directory containing your personal folder as well as shared folders
- **Favorites**: allows you to save most commonly viewed dashboard pages as your favorites
- **Dashboards**: list of available dashboards and analyses available to you
- **New**: opens a list of ad hoc content objects that you are eligible to create

**Catalog**

The Catalog contains shared folders for dashboards and reports that other schools and departments have developed. Please note that shared folders are based on security permissions, and your access will likely vary from the example shown below.

You may view any shared reports for a subject area that you have access to view. Please contact the Decision Support group for the school or department representative for shared content.

- Expand **Shared Folders** by clicking on the > sign.
- Under **Shared Folders/ School and Admin Folders**, each School/Dept has its own folder and sub-folders for Finance, HR, Student, and Cross-Functional. In Shared Folders/ School and Admin Folders the below actors can perform actions:

<table>
<thead>
<tr>
<th>Actor</th>
<th>Action in School and Admin Folders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anyone with access to Student, Financial, or HR Dashboard (does not include Course Eval or Reg Pipeline)</td>
<td>Open and Run</td>
</tr>
<tr>
<td>Ad Hoc Users</td>
<td>Copy and Paste to “My Folders”</td>
</tr>
<tr>
<td></td>
<td>Edit in &quot;My Folders&quot;</td>
</tr>
<tr>
<td>FO and designated analysts</td>
<td>Edit and Save</td>
</tr>
<tr>
<td>DSG</td>
<td>Delete and Rename</td>
</tr>
</tbody>
</table>
Open a Dashboard or Standard Report

From the Header, select **Dashboards**.

The **Dashboards** menu displays a list of Dashboards and Standard Reports that you can access. Your login, chartfield access and training completion status determine which links display. From the menu, select the Dashboard or Standard Report that you wish to access.

Each Dashboard can contain many different pages, which are represented by tabs. Page tabs display below the dashboard name. To navigate to the next page, click on the corresponding tab.
“About this Dashboard” and “About this Page” Metadata

Below the title of each dashboard, there are two links that provide access to the metadata and wiki pages about the selected dashboard.

- About this dashboard
- About this page

“About this dashboard” opens a DSG Wiki page with an overview of the dashboard.

“About this page” opens a DSG Wiki page with detailed metadata, useful information, and use notes about each report and graph displayed on the selected page.

It is highly recommended to reference these pages whenever you have any questions about the data on the dashboard.
**Registration Summary**

Purpose: provides a quick glance at a school’s registration activity for Term Activated students.

- By default, the page will load a report and various charts for the current term, for registered students, for the entire university.
- You can change any, or all, of the prompts to run this page for your school.
- Remember to click the ‘More Search options’ for additional filters!
- **Please Note:** There are no required filters; however, it is **HIGHLY** recommended that you choose, at a minimum, a term or term code.
- If you change the prompts, the reports will change to display that information.

**Registrations by Degree Level by School**

This report is displaying a **distinct count** of students that are registered by school, by degree level. (A student may be counted multiple times if he/she is registered in multiple degree levels.) Adding a grand total will display the overall distinct number of students. This distinct total may not match the overall line item totals.
- If you change the view selector, the report will display a distinct count of students that are registered by school, by program.
Student Registrations by Degree Level Chart

This chart shows the actual number of registrations within each degree level. A student may be counted multiple times if he/she is registered in multiple degree levels.

Total Distinct Student Registrations Chart

- This chart is showing the total distinct count of students registered. A student will be counted only once, even if s/he is registered in more than one degree program.
- This chart allows an easy way to drill down into your entire student population.
Undergraduates by Registration Status Chart and Graduates by Registration Status Chart

- These charts work independent of the ‘Registration Status’ prompt at the top of the page.
- They allow you to view all registration statuses, except leave of absence, for the entire population of your term activated undergraduates or graduates, respectively.
- Note: To view your term activated students that are on a leave of absence, use the student list page. Filter by Registration Status and Plan Code.

Undergraduates by Academic Level/New Continuing Type and Graduates by Academic Level/New Continuing Type Charts

- These charts have view selectors.
- By switching the values in the ‘view selector’, you can see the student population by Academic Level or by New Continuing Type.
Data definitions

Student Reporting School is a part of the NYU Reporting Department organizational hierarchy, developed as part of a Master Data Management initiative across NYU’s administrative systems.

The Student Reporting School is above the Student Reporting Department in the Reporting Department hierarchy. The Student Reporting School is generally a student's school of registration, though with notable exceptions, e.g. the Faculty of Arts and Science (FAS) is a Student Reporting School, though students actually register through the Graduate School of Arts and Science, the College of Arts and Science, or Liberal Studies. Also, Centers and Institutes are included as Student Reporting Schools (Courant Institute, Institute of Fine Arts) even though students actually register through one of the Arts and Sciences colleges or schools.

Student Reporting Schools with a value of NA: Student Reporting School is created based on the Student Reporting Dept. The reporting dept is created based on the Academic Organization. The Plans make up the Organizations. If a plan does not have an academic org associated with it, the chain is broken and the record will not have a corresponding Student Reporting School. These records need to be presented to the registrar.

Student Reporting Dept is a part of the NYU Reporting Department organizational hierarchy, developed as part of a Master Data Management initiative across NYU’s administrative systems. The Student Reporting Department is below the Student Reporting School in the Reporting Department hierarchy. The Student Reporting Department can be thought of as a student's major or field of study department, and is derived from the academic organization in the student's primary academic plan.

Academic Year and Calendar Year: Student data are displayed referencing: 1) the academic year and 2) the fall semester.

An academic year consists of a Fall, Winter, Spring and Summer term, which include two calendar years. The academic year on this dashboard is shown with both calendar years hyphenated. For example Academic year 13-14 includes Fall 2013 through Summer 2014.

The fall semester will refer to the calendar year in which the fall semester occurs. For example, Fall 2012 refers to the fall semester that occurred in calendar year 2012.
Study Away

Purpose: quickly displays how many students are studying away by city.

- The Study Away map is based on the "Study Agreement Code" that is associated with the student's term record. It is not based on the location of the class.
- The 'enrolled count' as shown in the map is a distinct student count. It may not match the number of records retrieved at the bottom of the page because one student may have a study agreement code for multiple sessions within the term.

It is important to note that some study agreement codes span multiple countries, and some study agreement codes do not denote an actual location.

For the purposes of this 'Study Away Dashboard Map', and in determining approximate counts by geographical location, the following rules are used:

General Rules for Study Agreement Codes:
1) If the city and country associated with the study agreement code are unknown: Students associated with that study agreement code will exist in an "Unknown" bucket in the Atlantic Ocean with Latitude/Longitude =37.472678, -45.439453.
2) If the city associated with the study agreement code is unknown, but the country is known, the unknown city value is overwritten with the main city, or the main NYU city in the country.
3) If OBIEE does not recognize the city or country associated with the study agreement code, OBIEE is supplied a location via latitude/longitude degrees.
4) If the study agreement spans multiple locations, it is being supplied a latitude/longitude equivalent to the middle of the continent in question. The Study Agreement Country value will equal: "Multi Country - [Continent]". (Continent determination is based on the UN Definitions.)

The Office of the Registrar has put together a wonderful document called "Albert Study Agreements for School". It explains many of the Study Away codes and when they are used.

Note: If the bubbles do not appear on your map, toggle the 'More Search Options' on and off. We are aware of this issue and are working towards a resolution. If a student has multiple subplans, the student will appear in the detail multiple times.

**Advisor Summary**

Purpose: provide an advisor with a list of his or her advisees and specific advisee attributes.

- The page was designed to pass the netID, of the person logged in to the dashboard, as the advisor netID. If you are not an advisor, no data will initially be returned.
- To run the advisor Summary page for a particular advisor:
  - Remove your Advisor NetID from the prompt and type in the netID of the advisor you wish you find (IN UPPER CASE).
  - Click the Apply button to run the query.

The dashboard automatically runs using the net id of an individual with the following Advisor Roles:

<table>
<thead>
<tr>
<th>Nyu Advr Role Ld</th>
<th>Advisor Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capstone Mentor</td>
<td>CPST</td>
</tr>
<tr>
<td>Advisor</td>
<td>ADVR</td>
</tr>
<tr>
<td>AEP/ESP Advisor</td>
<td>SLAD</td>
</tr>
</tbody>
</table>

If you are not an advisor, you can still run the dashboard. Check off “More Search Options” and then for Net Id, check off “(All Column Values)”. Then input your school, department, etc. and click “Apply.”
Filters:

- At the top of the page, you can see what filters are being applied.
- You can change any, or all, of the prompts to run this page for your school.

Results:

- The netID column is drillable. Clicking on any netID will allow you to drill to the student detail page.

Note: If you render no results, check off "More Search Options" and check if everything matches. For example, if you chose a student advisor in Steinhardt, and the school FAS is checked off.
Student List

Purpose: provide a comprehensive list of students along with attributes such as their CPP, cumulative metrics and other term specific information.

- You can navigate to this page either by clicking on the student tab at the top of the dashboard, or by drilling from the Registration Summary page.

Filters: By default, certain filters already have values chosen for you. (ie Term).

Results:

- From this page, you can select a student netID and drill to the Student Detail tab. There you will view detailed CPP and Class Enrollment data for the student.

Leave of Absence: To show leave of absence students, select "More Options" on left hand side to show additional filters. Then, change the filters:

- Registration Status = "Leave of Absence"
- Plan Code = search for your plan code(s)

Degree Checkout Status: To show list of students with degrees awarded, you must filter on "Degree Awarded" for Degree Checkout Status and then filter on Plan, Plan Code, Program, or Program Code. Filtering on "Degree Awarded" and then on a Student Academic Group or Student Academic Org will not render results, because the field shows as "Not Available." It is recommend to create an ad hoc report using the Degrees subject area to get an accurate list of students who graduated.

Notes: SIS ID is the student’s peoplesoft ID. If entering a netID, remember to enter it in UPPER CASE.
# Student List

Student Count: 996/06

<table>
<thead>
<tr>
<th>Term</th>
<th>SIS ID</th>
<th>NNumber</th>
<th>NetID</th>
<th>Full Name</th>
<th>NYU Email</th>
<th>Email Preferred</th>
<th>Student School</th>
<th>Student Academic Group</th>
<th>Student Academic Group Code</th>
<th>Student Academic Organization</th>
<th>Primary Plan</th>
<th>Primary Plan Code</th>
<th>Career</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Sch Prof Sttd</td>
<td>Sch of Prof Studies GR</td>
<td>OC</td>
<td>NYU Sch of Real E</td>
<td>Real Estate Development</td>
<td>GOREDEMS</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Registration Status</td>
<td>Enrollment Status</td>
<td>Academic Load Actual</td>
<td>Academic Standing Status</td>
<td>Study Away Agreement Code</td>
<td>Term Registration Type</td>
<td>Term Registration Type Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Enrolled</td>
<td>Active in Program</td>
<td>Enrolled</td>
<td>Full Time</td>
<td>Not Available</td>
<td>-</td>
<td>Entering with an UGRO Degree</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Academic Level</th>
<th>Legal Sex</th>
<th>IPEDS Ethnicity Code</th>
<th>Total Units Attempted NYU</th>
<th>Total Units Earned NYU</th>
<th>Term GPA</th>
<th>Cumulative GPA</th>
<th>Cumulative Quality Grade Points</th>
<th>Cumulative Units Attempted GPA</th>
<th>Cumulative Transfer Units</th>
<th>Cumulative Other Units</th>
<th>Program Requirement Term</th>
<th>Career Admission Term</th>
<th>Expected Graduation Term</th>
<th>Permanent Address 1</th>
<th>Permanent Address 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Masters</td>
<td>Male</td>
<td>Black</td>
<td>12.00</td>
<td>9.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>Fall 2017</td>
<td>Fall 2017</td>
<td>Fall 2020</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Student Detail**

**Purpose:** provides a *comprehensive history of a student’s academic record*, including his or her CPP and class enrollments.

- This page will only display information for one student at a time.
- You can navigate to this page either by clicking on the student detail tab at the top of the dashboard, or by drilling from other dashboard pages.

**Filters:** To view a student detailed information enter either the:
  - student’s netID (IN UPPER CASE) or
  - the student’s SIS ID (People Soft ID)

**Results:**
- The results are separated into two tabular data sets.
- The Term detail displays the Registration Status, CPP and Cume GPA by term.
- The Class detail (on the right) displays course enrollment and grade information.

**Instruction: Students**

**General Information**

**Data source:** This page shows class enrollment data from the PeopleSoft Campus Solutions Student Information System (SIS). Enrollment information is current at the time the dashboard source tables are loaded. The numbers shown can change from day to day as students enroll or withdraw from classes; history can also change due to retroactive enrollment changes.

**Update frequency:** Class enrollment data are updated nightly.

**Cross-enrollment analysis:** As detailed below, the cross-enrollment analysis on this page approximates the enrollment data that underlie Balance of Trade calculations but does not provide actual Balance of Trade detail. UDW+ will provide that functionality in the future.

**Supporting detail:** Detail supporting the graphic summaries is available by clicking on the bars. The detail reports list all primary instructors teaching a course. More than one is listed if a course was team-taught or there was more than one section of the course during the academic year or four-year period selected. In the future the Departmental Metrics Dashboard will include additional instructor detail.

Use notes: Some bars have two related detail reports. Click on one title or the other. The inclusion of instructor data complicates course-level reports. That column, or any other, can be removed by finding the dotted column identifier bar above the column title, right clicking on it, and choosing the Exclude column option.
Data and Definitions

Reporting Year: This report reflects Academic Years. An academic year consists of a Fall, Winter, Spring and Summer term, which include two calendar years. The academic year on this dashboard is shown with both calendar years hyphenated. For example Academic year 13-14 includes Fall 2013 through Summer 2014.

Class enrollments and points: Only the headcount and points of students enrolled at the time the dashboard is invoked are included. Students who have withdrawn are not counted.

Assigning courses to departments: Courses and students are assigned to a Reporting Department by the Academic Organization in which they are classified in SIS. For example, all courses in the Academic Organization Chemistry are assigned to Chemistry even if one is taught by an instructor from Physics.

Data note: This classification omits from a department's courses those in its subject areas coded to the Academic Organization Global Programs instead of the department's subject areas, due to data limitations. In the future these courses will be included.

Courses, sections and classes: Students register for a section, or sections, of a course. For example, in the course Introduction to Modern Chemistry (CHEM-UA 120) a student enrolls in lecture section 001, and chooses a laboratory section such as 201. Course sections are also referred to as classes.

Section type: Sections are classified by types that distinguish, for example, lectures, laboratory sections, and independent study. By default the dashboard summarizes all section types, but one or more may be chosen.

Class type: Students in multi-component courses may enroll in multiple sections—a lecture, laboratory and recitation, for example—so that summing section enrollments can result in multiple-counting each student. The default dashboard view eliminates multiple-counting by limiting the count to the single Enrollment Section identified in SIS as the graded component, the one for which points are recorded. The All Sections option may be selected to view section-level data including multiple-counting in multi-component courses.

Course Level: In most cases the course Academic Group included in the subject code is used to distinguish undergraduate and graduate courses. For example, courses with the subject code MATH-UA are undergraduate and those coded MATH-GA are graduate. Special cases are classified based on grading method where course coding does not indicate level: Wagner and University Program courses graded as undergraduate are defined as undergraduate. SCPS Diploma courses graded as graduate are categorized as graduate; all other Diploma courses are categorized as undergraduate.

Combined classes: Combined classes—also called cross-listed classes—are those for which students may register through more than one department or through more than one course within a department. One component of a combined class is identified as the sponsor. Total workload is assigned to the department of the sponsor section, and in the detail reports that total workload is identified with the name of the sponsoring section. For example, the Computer Science course CSCI-GA 2945 Topics in Numerical Analysis is combined with MATH-GA 2011 Advanced Topics in Numerical Analysis, which is the sponsor section. The total enrollment and points are assigned to Mathematics, listed as MATH-GA 2011. In the detail reports the total enrollment in combined classes is listed with the title of the sponsoring section. Classes that combine a graduate and an undergraduate section are assigned to the level of the sponsor section. If a combined class does not have a unique sponsor each component is assigned to the department of its subject area.
Doctoral and other students: Every student is assigned to a degree level in SIS. Students in the MD, DDS and JD programs are classified as professional.

Technical note: Every Academic Plan has an associated degree. For example, Chemistry doctoral students are assigned to the Academic Plan GACHEMPHD. Students are classified to a degree level by the Plan of their Primary Career. NYU’s Enrollment Definitions include the degree hierarchy that establishes primacy for students enrolled in multiple Careers.

Metrics: A student’s point count is the number of points for which he/she enrolled in the course regardless of whether it is successfully completed (in SIS “points attempted”). Class enrollments may be counted per section or per course as defined by the Section Type selected (defined above). The dashboard offers the option of measuring Instruction Delivered by counting points or class enrollments. For simplicity all point counts are rounded to the nearest whole number.

Instruction Delivered

Undergraduate Courses

This graph shows the total class enrollments or points in a department’s undergraduate courses. Drilling on a bar segment offers two types of course detail: undergraduate course enrollments for the year selected or the four-year trend in total undergraduate course enrollment. Class enrollments or points are shown, depending on the view selected for the graph.

Data note: In all the detail course listings attached to this dashboard the total enrollment in a combined class is displayed as enrollment in the sponsor class. For example, in a combined class sponsored by Academic Organization ABC with 10 students in class ABC 1234 and 5 students in class XYZ 1234 the detail report would list enrollment of 15 in class ABC 1234.

Graduate Courses

This graph shows the total class enrollments or points in a department’s graduate courses, optionally segregating the number generated by doctoral and other students. Drilling on a bar segment offers two types of course detail: course enrollments by doctoral and others students for the year selected, or the four-year trend in total graduate course enrollment. Class enrollments or points are shown, depending on the view selected for the graph.

Cross-Enrollment Analysis

The Cross-Enrollment Analysis shows the extent to which a department teaches its own students, students from other departments in the same school, and students from other schools. The measure of interschool flows approximates the classification of points on which Balance of Trade calculations are based, but the dashboard shows enrollment data current at the time the dashboard is run while the Balance of Trade calculation uses census enrollments.

In the Cross-Enrollment analysis, as in Balance of Trade calculations, every student is assigned to their single primary major.

Technical note: In- and out-flows are generated when a student in one SIS Academic Group takes a course in another Academic Group. For simplicity, the dashboard refers to cross-enrollment between Schools,
although many schools comprise two Academic Groups, one for graduate and one for undergraduate students. Thus an undergraduate taking a graduate course within his/her department generates an outflow from the undergraduate Academic Group and offsetting inflow to the graduate Academic Group; these flows net to 0 for the department.

An example can clarify the calculation:

- Department X in Academic Group A teaches 50 points to students from Academic Group B.
- Students in Department X take courses totaling 25 points in Academic Group B.
- Department X also teaches 100 points to its own majors and 200 points to other students in Academic Group A.
- Department X has 50 inflow points from Academic Group B.
- Department X has 25 outflow points to Academic Group B.
- Department X has 25 net inflow points from Academic Group B.
- The 100 points taught to majors and 200 points taught to other students within the school are neither inflow nor outflow.

Because it is department-specific this analysis can only be run for a single department.

Points Taught in Department Courses

This graph displays the total points taught in a department’s courses segregating three groups of students: (i) students in the department’s majors or graduate programs, (ii) students from other departments within the department’s “school” (Academic Group), and (iii) students from other “schools.” The last category generates the Balance of Trade inflow to the department’s school and is highlighted in green. **Drilling on a bar segment offers two types of detail: course detail for the year selected showing the distribution among the three types of student, and the four-year trends summarizing enrollment by school and department.**

Points Taken by Department Students

This graph displays the total points taken by a department’s students segregating (i) department courses, (ii) other courses in the same “school” (Academic Group), and (iii) courses in other “schools.” The last category generates the department’s Balance of Trade outflow highlighted in gold. **Drilling on any bar segment shows the other schools and subject areas in which department students have taken courses for the last four years.**
Data note: The detail report may show allocations that appear wrong, such as "Other courses in the same school" listed in a school different from the department for which the report is run. That anomaly occurs in combined classes when the sponsor is in the department’s school but the student registers in a non-sponsor section outside the school. Sponsorship assigns it to "Other course in the same school" although the department of the course for which the student registered is outside the school.

Points in and Out of Department’s School

This graph combines the in- and out-flows identified in the previous two graphs showing outflow in yellow and inflow in green. Drill to detail is provided in the prior graphs.

Net Interschool Activity

This graph shows net interschool flow calculated as inflow points—generated by students from other schools—minus outflow points—generated by department students taking courses in other schools. Drilling on any bar segment displays net intergroup activity over four years.
Meeting Pattern Reports

**Enrollments**
Purpose: provides total class enrollments, meeting pattern information, and calculations comparing enrollment limit, room capacity, and actual enrollment. The query will retrieve all classes where the academic group entered is either the Course Academic Group, or the Sponsor Academic Group.

Filters:
The prompts on this report are a little different than other dashboard pages, because of the complexity of the report. Please note the following:

1. You **must** enter a Term or a Term Code
2. If you enter your Course Academic Group, **you must also enter that same value** into the Sponsor Academic Group.
3. If you enter your Course Academic Group Code, **you must also enter that same value** into the Sponsor Academic Group Code.

Results:
- Once the data is retrieved, a list of classes and enrollment information is visible on the screen.
- The column 'Total Headcount' is a calculated field. It will show the total enrolled headcount for a class regardless if it is a combined class or a non-combined class.
- Enrollment Capacity vs Actual Enrollment: This calculation simply divides the Enrollment Headcount by the Enrollment Capacity, and multiples the result by 100.
- Enrollment Capacity vs Room Capacity: This calculation divides the Enrollment Capacity by the Requested Room Capacity, and multiples the result by 100.
- You can view the meeting pattern information associated with an individual class or ALL your classes by clicking on the column header SIS CLASS NUMBER or an individual SIS Class Number.
  - Select the “SIS Class Number “and follow the drill to Meeting Pattern.
  - This will open a new browser window and display the information for that class.
  - A class may be listed multiple times if it has multiple instructors, section types, or meeting patterns.
Class Roster

Purpose: provides information regarding courses, meeting patterns and the students that are enrolled or wait-listed in them. (It is a combination of select attributes from the UDW+ Class Enrollment subject area as well as the Class Meeting Pattern subject area.) A drill to 'Roster Detail' is available on the 'Combined Class Subject Number Title' column, only if the course is combined. This Roster Detail report will show data for all sections of a combined course. A drill to 'Roster Detail' is also available on the 'Class Subject Number Section' column. (If the ‘Session Section Combined ID’ ends in a ‘-1’, the course is not combined.)

The Class Roster formatted report shows limited columns pertaining to a roster. However, if you export the data as .csv, all detailed columns are available.

It is EXTREMELY important to note the following:

- The Class Roster will ONLY pull back complete information for terms that are ACTIVE or open for enrollment. If a term is completed, the full data set will NOT be returned.
- The Class Roster will only provide the PRIMARY CPP of a student (Major approved, major unapproved).
- The Class Roster report only contains information on the primary instructor. Exporting the report as .csv will provide information on many other attributes, including all instructors.
- The Class Roster DOES contain Meeting Pattern Information regarding a course.
- The Class Roster DOES include combined sections.
Required Filters:

- Term OR Term Code
- Course Academic Group Code

We are currently working on two items with Class Roster:

- There is a known issue in OBIEE where by drilling on a report, with no assigned instructor, will bring back no data for the class.
- The term filter drop down box only shows terms for 2016. As an tentative solution, search for, or type, the active term you wish you retrieve.

**Emergency Information**

Purpose: provide detailed emergency contact information for students enrolled in particular classes based on meeting time, day and building.

Filters:

- Term or Term Code are required.
- All other prompts are optional.
- However, it is recommended to enter, at a minimum, the session, NYU Standard Meeting Pattern, Building and Meeting start time.

Results:

- The results will contain two tabular reports.
- The top report displays the Building, Class, Room Number, Meeting Time and the total enrollment for each class.
- The bottom report displays all the Student Contact Information
Schedule of Classes

Purpose: provides data on class meeting pattern. This report uses the Class Meeting Pattern Subject Area.

There is a hard coded filter on "Primary Instructor Assigned = 'N'". This will ensure that if an 'Instructor Role' filter is used, the results will also retrieve data where no primary instructor is assigned.

Classes, Class Locations, and Enrolled Students

Purpose: pull a list of anyone enrolled in a class, at any class location, for any school, or for any subject. The main requirement was to be versatile in allowing users to enter an org, a subject, or even an SIS Class Number.

To use this report, you must enter a term(s), or a term code(s). All other filters are optional. This report uses the Class Enrollment Subject area.

It is retrieving students that are 'enrolled', by default, in 'Active' classes. It is filtered to only retrieve data associated with the student's major approved/unapproved.

Currently, the reporting population will use C2 or C3 in order to find enrollment totals or class enrollment lists. C3 is a very busy query and often produces much more than required. However, C3 does provide combined section detail. At this time, the 'Classes, Class Locations and Student Enrollments' report does not replicate the C3 effort for combined classes.
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</thead>
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<tr>
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</tr>
<tr>
<td>A2 - Home School Student Information, Basic Class Enrollment Information and Advisor Information</td>
</tr>
<tr>
<td>(Use the Advisor Summary Tab)</td>
</tr>
<tr>
<td>A3 - Home School STUDENT information, majors and minors and advisor information</td>
</tr>
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<th>C Reports</th>
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</tr>
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</tr>
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</tr>
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<table>
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<tr>
<th>S Reports</th>
</tr>
</thead>
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</tr>
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</tr>
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</tr>
<tr>
<td>S4 - Home School STUDENT information, majors and minors</td>
</tr>
<tr>
<td>S5 Home School STUDENT information, majors and minors, by PROGRAM status</td>
</tr>
</tbody>
</table>

**A1, A2 - Advisor Summary**

Purpose: provide an advisor with a list of his or her advisees and specific advisee attributes. *Same as Advisor Summary tab.*
**A4- Home School STUDENT information, majors and minors and advisor information**

**Purpose:** allows a school to obtain **student and advisor related information**.

This report uses the Term Registration Subject Area.

**Please be aware that this report has many additional filters as compared to Brio's A4.**

Use this report to find all students who have their Primary Major*, within their Primary Program**, in one of the Programs/Plans owned by the school. This population of students is often referred to by the schools as “My Students”. It is important to note that information relating to ALL of the students’ plans, regardless of plan type, (major approved, major unapproved, non primary major, and minor) may be retrieved with this export. If no Programs/Plans are selected, the entire school’s student population will be included, and will contain information about ALL their plans.

The results include the students’ **basic demographic information, general student information and information related to the students’ major(s) or minor(s) (academic career, program, plan, etc.)** as well as information about EACH assigned advisor (name, advisor number, email, etc.).

**Note:**

- NetID filter must be entered in upper case.
- The Plans that can be selected as parameters in this export include ALL Plans that a school’s programs are associated with, including non primary majors and minors as well as majors.
- The term reg subject area will only show the primary study agreement per student per term. If a student has multiple study agreements within a term, this subject area will not display them.
- Drilling on the student’s netID will open up the Student Detail page of the Student Academic Management Dashboard.
### A4

**Home School STUDENT information, majors and minors and advisor information**

**Enrollment Status:** Full-Time

**Academic Level:** Graduate

**Term:** Fall 2015

**Degree:** Master of Professional Studies

**Program:** Interactive Telecommunications

**Plan Code:** Interactive Telecommunications

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<th>Cumulative Total Units</th>
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**Advisor Number:** 0.00

**Advisor Email:**

**Email Preferred:**

**Permanent Address 1:**

**Permanent Address 2:**

**Permanent Address 3:**

**Permanent Address 4:**

**Permanent City:**

**Permanent State/Province Code:**

**Permanent Country Code:**

**Permanent Postal Code:**
A5- Home School STUDENT information, majors and minors, by PROGRAM status & advisor information

Purpose: allows reporting on students regardless if they were term activated + advisor information. Choose a program status and view your entire student population for that status.

This report uses the SIS - Career History subject area and is similar to the 'S5 - Home School STUDENT information, majors and minors, by PROGRAM status' report. The difference between the S5 and A5 reports is the A5 also include advisor information.

This report allows a school to get student related information for all students who have their Primary Major, within their Primary Program, in one of the Programs/Plans owned by the school who have a PARTICULAR PROGRAM STATUS for the term entered (regardless of whether or not they were term activated for that term or have no term record for that term). This population of students is often referred to by the schools as “My Students”. It is important to note that you CAN bring back ALL information relating to ALL of the students’ plans, regardless of plan type, (major approved, major unapproved, non primary major, and minor) if you do not choose to filter by Plan Type. If no Programs/Plans are selected, the entire school’s student population will be included, and will contain information about ALL their plans.

This analysis allows you to limit on ONE of four Program Status codes: AC – Active, CM – Completed, LA – Leave of Absence, and DC – Discontinued, and can be run for A SINGLE TERM ONLY.

The results include the students’ basic contact and demographic information (address, phone, email, gender, etc.), general student information (enrollment status, load, req term, points, hours, expected grad term, completion term, etc.), information related to the students’ major(s) or minor(s) (academic career, program, plan, etc.), and advisor information (name, role, plan, etc).
### A5

**Home School STUDENT information, majors and minors, by PROGRAM status & advisor information**

**District Student Count: 324**

**Row Count: 389**

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<th>Program Status</th>
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**Permanen City**

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**Citizenship Country Code**

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<th>Visa Permit Effective Date</th>
<th>Visa Permit Status</th>
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<th>Advisor N Number</th>
<th>Advisor NetID</th>
<th>Advisor Role Code</th>
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<td>-</td>
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</table>
C1 - Home School Class basic/general information

Purpose: This report uses the Class Meeting Pattern Subject Area. It results in a list of classes being offered by a school and general class information (class name, subject, catalog number, location, component, etc.) Users can drill on 'SIS Class Number' to view the instructor information for a class, or all classes. We are currently unable to show the COMBINED CLASS ENROLLMENT TOTAL. This is an enhancement that will be coming shortly.

BUSINESS PURPOSES

Use this export to:

- List class offerings.
- Monitor enrollment counts (before crosslisting).
- Examine classroom utilization (without schedules).
- Monitor registration progress: enrollment totals per class; which classes are full, or cancelled; thus the popularity of your classes.
- Obtain a basic list of classes and their enrollments.
- See what instructors have been assigned to your classes and the enrollment counts for those classes.
- Monitor attributes that have been assigned to your classes in Campus Solutions.

Note:

- The instructor information that is included is for all instructor roles. A class can have multiple instructors (with roles other than primary) and multiple primary instructors. Use the filters at the of the page to limit the data.
- This export is not limited to active classes. Please be aware that all class statuses, including cancelled classes, are contained in this report.
C1
Home School Class Basic Information. (One row per term, per session, per class section) Drill on SIS Class Number to view the instructors.
Row Count: 11

| Class Location | Term Code | Session | Session Code | Subject Number | SIS Class Number | Subject Code | Catalog Number | Class Section | Course Title | Subject/Number | Subject/Number | Course Academic Group | Course Academic Group Code | Class Level |
|----------------|-----------|---------|--------------|----------------|------------------|--------------|---------------|---------------|--------------|--------------|---------------|----------------|--------------------------|---------------------------|-------------|
| United States  | 1178      | Fall 2017 | Regular Academic Session | ACTG-GT1002 | 5529 ACTG-GT | 1602 001 | Production CrewAct | - | ACTG-GT 1002 | Production CrewAct | Graduate Acting | Tisch Schil of the Arts GR | GT | Graduate |
| United States  | 1178      | Fall 2017 | Regular Academic Session | ACTG-GT1002 | 5530 ACTG-GT | 1605 001 | Acting III | - | ACTG-GT 1005 | Acting III | Graduate Acting | Tisch Schil of the Arts GR | GT | Graduate |

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<th>Class Location</th>
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<th>Course Grading Basis Code</th>
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<td>Studio</td>
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<td>O</td>
<td>Open</td>
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<td>Tisch Schil of the Arts GR</td>
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<tr>
<td>GTACTG</td>
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<td>12/15/2017 12:00:00 AM</td>
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C2- Home School Class detailed information

Purpose: It results in a list of classes being offered by a school and basic class information (class name, subject, catalog number, location, component, etc.) and class meeting pattern information (days, meeting time start, meeting time end, etc.) for each class. This report uses the Class Meeting Pattern Subject Area.

Use this report to:

- Review class schedules.
- Review enrollment totals for classes.
- Monitor meeting pattern information for a class

This report contains NO instructor information. This report is not limited to active classes. Please be aware that all class statuses, including cancelled classes, are contained in this report.
C3- Home School Class basic information and student enrollment information

Purpose: This report results in a list of classes being offered by a school and basic class information (class name, subject, catalog number, location, component, etc) as well as a list of all students and their basic contact and demographic information (address, phone, email, gender, etc.), other general student information (enrollment status, etc.), and information related to their primary major (academic career, program, plan, etc.) for all students associated with each class.

To view the instructor information associated with a class and the students enrolled in the class, click on the 'Class Number'. Follow the prompt to the drill. To view the instructors associated with all the classes, click on the 'Class Number' column header. Follow the prompt to the drill.

This report contains information on COMBINED SECTIONS. You can only run C3 for ONE term at a time.

Use this report to:

- Extract enrollment counts based on Combined Sections information
- Create simple class rosters if the class schedule is not needed.
- Get contact lists for class enrollees; total units per class.
- List grades issued in a class.

Notes:

- You can only query one term at a time. The report will default to display options for the current term and prior terms. For future terms, click on the drop down box, then "Search". Type in the future term, highlight it so it turns blue, then click on "Ok."
- In addition to Term or Term Code, you must filter on:
  - Course Academic Group and Sponsor Academic Group
  - Course Academic Organization and Sponsor Academic Organization
- Start of term academic level and end of term academic level are not currently available in this report.
- This dashboard has a default filter on Plan type = Major approved or approved. This is to ensure we are getting the primary major associated with a student.
- Financial Clearance flag is currently not available.
- This query is not filtered by Registration Status or Class Enrollment Status. You are seeing all students that had enrollment activity in the course.
- UDW+ may have more records than Brio C3. This is because UDW+ does not purge the drops. 'Drops' are retained for analytical purposes. Users can easily modify this query to exclude the drops.
- UDW+ may have less records than Brio C3, as we are not showing classes with zero enrollment. (This analysis is displaying data from the Class Enrollment subject area. The Class Meeting Pattern Subject Area tracks classes with zero enrollment activity, but it does not contain student data).
- Brio's C3 merged combined sections onto non-combined sections. Sometimes classes were double counted because it was listed as both a sponsor and a non combined class. Students would be listed in both instances causing additional rows to appear. This does not occur in UDW+. Enrollment counts tie to Albert.
- Combined Class Enrollment Headcount will be 0 if the class is NOT combined. The Class Enrolled Headcount will show the counts for classes that are not combined.
### C3 - Home School CLASS basic information and student enrollment information

Row Count: 1983

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<th>Term</th>
<th>Session Code</th>
<th>Session</th>
<th>Subject Code</th>
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<th>SubjectNumber</th>
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<td>Graduate</td>
<td>Washington Squares</td>
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<th>Final Grade</th>
<th>Student Grade Basis</th>
<th>Minimum Grade</th>
<th>Maximum Grade</th>
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</table>
**C4- Home School Class detailed information, all instructors**

Purpose: It results in a list of classes being offered by a school and basic class information (class name, subject, catalog number, location, component, etc.), class meeting pattern information (days, meeting time start, meeting time end, etc.), as well as instructor information for all instructors associated with each class. This analysis uses the Class Meeting Pattern Subject area.

This analysis includes all instructors associated with the class, regardless of the role they are assigned. This export is not limited to active classes. Please be aware that all class statuses, including cancelled classes, are contained in this export.

Use this report to:

- Generate schedules for instructors.
- Report on or verify instructor and grader assignments.
- Confirm academic staffing.
P1- Home School Plan information and the students in them

Purpose: It results in a list of a school’s plans and all the students who are associated with each plan. The student information that is included is the students’ basic contact and demographic information (address, phone, email, gender, etc.), other general student information (enrollment status, etc.), and information related to each program/plan in the school (academic career, program, plan, etc.). This report is built on the Term Registration Subject Area.

Use this report to:

- Perform student counts within each of your plans
- View the Degree Checkout status of students in your plan
- View the Expected Graduation Term, Completion Term or Career Admit Term for the students in your plans.
P2- Home School Plan information and a complete listing for the students in them

Purpose: It results in a list of a school's plans and a list of all the students who are associated with each plan. The student information that is included is the students' basic contact and demographic information (address, phone, email, gender, etc.), other general student information (enrollment status, degree checkout status etc.), and information related to ALL programs/plans (academic career, program, plan, etc.) that the student is associated with. This report uses the Term Registration Subject Area.

Plans roll up to Reporting Department. Reporting Departments roll up to Reporting School and Reporting School Group. Whenever an analysis is based on the 'owner' of a plan, filters should be applies using the 'Reporting Department' or 'Reporting School' or 'Reporting School Group'.

Use this report to:

- Get a list of all students (from your school or another division) who are registered in one of your school's plans/subplans. This is a convenient means of reporting on your school's minors or secondary majors.
- Examine declared majors and minors of students associated with a department. (e.g. "where do chemistry majors tend to double major", Biology or Spanish?)
- To view the Expected Graduation Term, Completion Term or Career Admit Term for the students in your plans.

NOTE: Summed metrics should NOT be created based on this data since the same metrics may be repeated on each line causing inflated summations. Expected Grad Term and Degree Checkout Status are available in this file.
<table>
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<tr>
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<td>Enrolled Full Time</td>
<td>F</td>
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<td>-</td>
<td>Master of Fine Arts</td>
<td>Graduate</td>
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<td>Active in Program</td>
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<th>Study Abroad Phone Number</th>
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<th>Permanent City</th>
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<th>Permanent Country</th>
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<th>Mailing Country</th>
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<th>Legal SEX</th>
<th>IPEDS Ethnicity Code</th>
<th>Academic Standing Status</th>
<th>Academic Standing Status Code</th>
<th>Term Quality/Grade Points</th>
<th>Term GPA</th>
<th>Total Units Attempted</th>
<th>Total Units Earned</th>
<th>Active Units</th>
<th>Cumulative Total Units</th>
<th>Cumulative GPA</th>
<th>Cumulative Total Units</th>
<th>Cumulative GPA</th>
</tr>
</thead>
</table>
**P3- Home School Plan information and the students awarded degrees in them**

Purpose: This report will result in a list of students who have been awarded a degree in their home school. In addition to the primary program information, details related to the student's non primary major and or minor is displayed. The student information that is included is the student's basic contact and demographic information as well as important degree information. This report uses the Degrees subject area.

The Plan Type filter is used, in conjunction with the other filters, to identify the population of students you want to report on. For example, find anyone that has a minor in Ancient History and show their entire CPP stack. This information MAY include revoked degrees.
S1- Home School Student information, major approved/unapproved only

Purpose: This report is filtered to allow a school to get student related information for all students who have their Primary Major, within their Primary Program, in one of the Programs/Plans owned by the school.

It is important to note that if you change the 'Plan Type' filter to include all plan types, you will retrieve information pertaining to the student’s entire plan. If no Programs/Plans are selected, the entire school’s student population will be included.

The results include the students’ basic contact and demographic information (address, phone, email, gender, etc.), other general student information (enrollment status, load, req term, units, GPA, etc.), and information related to the students’ academic career, program, plan.

How does this report compare to the other Student (S) reports?

- S1, S2 and S4 results contain the same potential student population. This is dependent, of course, on the parameters that are entered.
- S3 does not give the option to pull back information on the student's full plan. It will only bring back the student's Primary Major.
- S1, S2 and S3 are defaulted, in UDW+, to retrieve information based on the students’ PRIMARY MAJOR ONLY. S4 is defaulted to retrieve student information for ALL Plan Types (All majors and All minors)
- This export provides the same basic contact, demographic, other general, and primary major information as S2. S2, however, also includes the students’ class information and S3 includes the students’ class and class meeting pattern information. S4 does not provide class or class meeting pattern information but it does provide information about majors and minors that are not the student’s primary major.

Use this report to:

- Obtain information (such as Term Registration Type ) regarding the students majoring in a degree or non-degree program in a school.
- Monitor the basic status of your students as well as for simple bio-demo reporting.
- Obtain a contact list of your students.
- Check enrollment status of students in current and upcoming terms.
- Obtain Date of Birth for student.

Reminder:

This report allows you to change the filter on 'Plan Type'. If you change the 'Plan Type' filter at the top of the dashboard, you will bring back multiple rows per student.
## S1 - Home School STUDENT information, major approved/unapproved only

**Term Code**: Fall 2017  
**Term**: Fall  
**Year**: 2017  
**Roll Count**: 84  
**Student Name**:  
**Middle Name**:  
**First Name**:  
**Last Name**:  
**N Number**:  
**Sex**:  
**Street**:  
**City**:  
**State**:  
**Zip**:  
**Telephone**:  
**Email**:  
**Major**:  
**College**:  
**Class**:  
**Term Code**: Fall 2017  
**Term**: Fall  
**Year**: 2017  
**Roll Count**: 84  
**Student Name**:  
**Middle Name**:  
**First Name**:  
**Last Name**:  
**N Number**:  
**Sex**:  
**Street**:  
**City**:  
**State**:  
**Zip**:  
**Telephone**:  
**Email**:  
**Major**:  
**College**:  
**Class**:  

### Program Requirements

**Program Name**: Design  
**Program Code**: OTDE00  
**Plan Code**: OTDE00A  
**Plan Type**: OT00A  
**Primary Program**: Theatre Design  
**Primary Plan**: OTDE00A  
**Degree**: Bachelor of Fine Arts  
**Academic Level**: Major Approved  
**Academic Load**: Full Time  
**Study Away Agreement**: Not Available  
**Study Away Agreement Type**: Not Available  
**Study Away Country**: United States  

### Address Information

**Address 1**:  
**Address 2**:  
**City**:  
**State**:  
**Zip**:  

### Cumulative GPA Information

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### Academic Information

- **Fields**:  
- **Columns**:  
- **Data Entry**:  
- **Buttons**:  
- **Options**:  

**Note**: There are no results to display based on the selected prompts.

- **Analysis - Edit - Refresh**
S2- Home School Student information and basic class enrollment information

Purpose: This report is filtered to allow a school to get student related information for all students who have their Primary Major, within their Primary Program, in one of the Programs/Plans owned by the school.

It is important to note that if you change the 'Plan Type' filter to include all plan types, you will retrieve information pertaining to the student’s entire plan. If no Programs/Plans are selected, the entire school’s student population will be included.

The results include the students’ basic contact and demographic information (address, phone, email, gender, etc.), general student information (enrollment status, load, req term, units, etc.), information related to the students’ academic career, program, plan and class information (class name, subject, catalog number, location, section type/component, etc) for all classes that the student is associated with—regardless of the school offering the class.

How does this export compare to the other Student (S) exports?

- S1, S2 and S4 results contain the same potential student population. This is dependent, of course, on the parameters that are entered.
- S3 does not give the option to pull back information on the student's full plan. It will only bring back the student's Primary Major.
- S1, S2 and S3 are defaulted, in UDW+, to retrieve information based on the students’ PRIMARY MAJOR ONLY. S4 is defaulted to retrieve student information for ALL Plan Types (All majors and All minors)
- This export provides the same basic contact, demographic, other general, and primary major information as S2. S2, however, also includes the students’ class information and S3 includes the students’ class and class meeting pattern information. S4 does not provide class or class meeting pattern information but it does provide information about majors and minors that are not the student’s primary major.

Use this report to:

- Monitor the classes being taken by the majors in a school inside and outside their own program; thus providing a means for a school to tally the total number of units that are lost to the school or dept.
- Advise students since the results show academic status info about a student in addition to class enrollment info.
- Review grades received by students in a given term or terms and advise them.

Notes:

- UDW+ S2 report may show additional rows when compared to Brio. This is because students that drop classes prior to the end of add/drop are captured in UDW+. They are not in Brio.
- This report displays all enrollment statuses for a student in a class. This includes dropped classes.
**S2**

**Home School Student information and basic class enrollment information**

**Disenrolled Count: 0**

**Row Count: 148**

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<td>Enrolled</td>
<td>E</td>
<td>New/Continuing Masters</td>
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<td>GT, Tisch Sch of the Arts</td>
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<th>International Flag</th>
<th>US Citizenship Status</th>
<th>Citizenship Country</th>
<th>Citizenship Code</th>
<th>US Visa Code</th>
<th>Academic Standing Status</th>
<th>Academic Standing Code</th>
<th>Subject/Number</th>
<th>Subject Code</th>
<th>Catalog Number</th>
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<td>2020</td>
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| Section Type | Course Level | Class Enrollment Status | Student Grading Basis | MIdterm Grade | Final Grade | Minimum Units | Maximum Units | SIS Course Code | Course Enrollment Type | Instruction Mode | Combined Status | Class Location Country | Session Section Combined ID | Class Level | Class Start Date | Class End Date | Class Capacity |
|--------------|--------------|-------------------------|-----------------------|---------------|-------------|----------------|----------------|-----------------|-------------------|-------------------|----------------|-------------------|------------------------|------------|-----------------|--------------|----------------|}

| Studio       | Graduate     | Enrolled               | Not Available         | -              | 5.00        | 5.00 | T15S252       | Enrollment    | In-Person        | United States   | United States |                | 1178-1                | Graduate     | 9/5/2017 | 12:00 AM | 12/15/2017 | 12:00 AM | 30.0 |

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<th>Course Capacity</th>
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<th>Course Academic Group Code</th>
<th>Course Academic Organization</th>
<th>Course Academic Organization Code</th>
<th>Course Org Reporting Department</th>
<th>Course Status</th>
<th>Class Status End Term Code</th>
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<td>GT</td>
<td>GTACTG</td>
<td>GT-Tisch Sch of the Arts Grad</td>
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<td>CON</td>
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</thead>
<tbody>
<tr>
<td>5.00</td>
<td>0.000</td>
<td>0.000</td>
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</table>
S3- Home School Student information and detailed class enrollment information

Purpose: This report allows a school to get student and detailed class information for all students who have their Primary Major, within their Primary Program, in one of the Programs/Plans owned by the school. It is important to note that ONLY information pertaining to the student’s PRIMARY MAJOR can be retrieved using this report. If no Programs/Plans are selected, the entire school’s student population will be included, but will only contain information about their primary major.

To view the meeting pattern associated with the classes, click on student’s netID and follow the prompts to the drill. This drill report will list the classes, the student’s enrollment status in the class, and the meeting pattern of the classes.

How does this report compare to the other Student (S) reports?

- S1, S2 and S4 results contain the same potential student population. This is dependent, of course, on the parameters that are entered.
- S3 does not give the option to pull back information on the student’s full plan. It will only bring back the student’s Primary Major.
- S1, S2 and S3 are defaulted, in UDW+, to retrieve information based on the students’ PRIMARY MAJOR ONLY. S4 is defaulted to retrieve student information for ALL Plan Types (All majors and All minors)
- This export provides the same basic contact, demographic, other general, and primary major information as S2. S2, however, also includes the students’ class information and S3 includes the students’ class and class meeting pattern information. S4 does not provide class or class meeting pattern information but it does provide information about majors and minors that are not the student’s primary major.

- This report provides a drill to view the Class Enrollment activity data as well as meeting pattern information.

Use this report to:

- Get a list of the students, classes and meeting patterns

Note: Your total row count may not initially match the Brio report because UDW+ is not displaying the meeting patterns. You must drill to see the meeting pattern.
S3 - Home School Student information and detailed class enrollment information

Purpose: This report allows a school to get student related information for all students who have their Primary Major, within their Primary Program, in one of the Programs/Plans owned by the school. This population of students is often referred to by the schools as “My Students”. It is important to note that information relating to ALL of the students’ plans, regardless of plan type, (major approved, major unapproved, non-primary major, and minor) may be retrieved with this export. If no Programs/Plans are selected, the entire school’s student population will be included, and will contain information about ALL their plans.

The results include the students’ basic contact and demographic information (address, phone, email, gender, etc.), general student information (enrollment status, load, req term, points, hours, expected grad term, completion term, etc.), and information related to the students’ major(s) or minor(s) (academic career, program, plan, etc.).

How does this report compare to the other Student (S) reports?

- S1, S2 and S4 results contain the same potential student population. This is dependent, of course, on the parameters that are entered.
- S3 does not give the option to pull back information on the student’s full plan. It will only bring back the student’s Primary Major.
- S1, S2 and S3 are defaulted, in UDW+, to retrieve information based on the students’ PRIMARY MAJOR ONLY. S4 is defaulted to retrieve student information for ALL Plan Types (All majors and All minors)
- This export provides the same basic contact, demographic, other general, and primary major information as S2. S2, however, also includes the students’ class information and S3 includes the students’ class and class meeting pattern information. S4 does not provide class or class meeting pattern information but it does provide information about majors and minors that are not the student’s primary major.
Additional information:

- The Plans that can be selected as parameters in this export include ALL Plans that a school’s programs are associated with, including non primary majors and minors as well as majors

Use this report to:

- Report on all majors and minors for your students.
- Identify students who have applied for graduation.
- Report on the ‘Expected Graduation Term’, ‘Admit Term’ and ‘Completion Term’ for students
- Tracking your students' interest in minors outside your school.
- Obtain Birth Date of student.

NOTE: Currently, students that on leave, have an Acad Group of ' Not available' in UDW+. Therefore your row counts may not match Brio’s S4 results because of these students. We are working on this issue.
S5- Home School Student information, majors and minors, by Program Status

Purpose: This report allows a school to get student related information for all students who have their Primary Major, within their Primary Program, in one of the Programs/Plans owned by the school who have a PARTICULAR PROGRAM STATUS for the term entered (regardless of whether or not they were term activated for that term or have no term record for that term). This population of students is often referred to by the schools as “My Students”. It is important to note that you CAN bring back ALL information relating to ALL of the students’ plans, regardless of plan type, (major approved, major unapproved, non-primary major, and minor) if you do not choose to filter by Plan Type. If no Programs/Plans are selected, the entire school’s student population will be included, and will contain information about ALL their plans.

This analysis allows you to limit on ONE of four Program Status codes: AC – Active, CM – Completed, LA – Leave of Absence, and DC – Discontinued, and can be run for A SINGLE TERM ONLY.

The results include the students’ basic contact and demographic information (address, phone, email, gender, etc.), general student information (enrollment status, load, req term, points, hours, expected grad term, completion term, etc.), and information related to the students’ major(s) or minor(s) (academic career, program, plan, etc.).

How does this report compare to the other Student (S) reports?

- Only students with the selected PROGRAM STATUS appear in this report
- This export provides the same basic contact, demographic, general, and major information as S1, S2 and S3. S4, however, does not provide class or class meeting pattern information but does provide plan information outside of the student’s primary major (Primary Program/Plan).

Use this report to:

- Report on students regardless if they were term activated.
- Choose a program status and view your entire student population for that status.
55

Home School STUDENT information, majors and minors, by PROGRAM status

Distinct Student Count: 200
Row Count: 200
Prompts
Select from Dropdown Box

Dashboard pages contain prompts in order to filter the result data. Required prompts are indicated by the asterisk (*) to the left of the prompt name.

To view the available prompt selections, click on the drop-down arrow. Make a selection from the available options. Then step off of the prompt by clicking in the whitespace. If you do not make any selection, then it will bring back all of the chartfields that you have access to. Remember to select on option for the prompts with an asterisk (*). Then click the "Apply" button to generate your results.

Search

The Search option is useful when a prompt has a long list of choices, when you want to search for your selection, or when you want to select multiple values. Click the dropdown arrow, and then the Search...

To begin your search, choose your search function ("Starts","Contains","Ends","is Like"), and then type in your search terms. Click the "Search" button. The "Name" box will populate with your results. Be sure to uncheck "Match Case" as it is case-sensitive.
Once you find your value, highlight it so it turns blue and click the "Move" arrow to move your value to the "Selected" area. You may move multiple values individually, or you may click the "Move All" double arrows to move the entire returned list. Click "OK" when you have selected all of the needed values.

When the desired values are selected, click OK. Then click Apply to view your results. Please note that the “Apply” button will be grayed out until all required prompts are set.
More Search Options
Check this box if you would like additional prompts to search by.

Drill/Rollup/Sort/Rearrange Columns

Drilling
Most sections of the page allow users to drill down into the student list to see the corresponding student population. Links are indicated by blue text.

Click on a blue link to drill down.

The report will open in a separate window. To return to the prior report, use the “Return” link (if available), or close the newly created browser window.

Roll ups
Some dashboards and reports provide the ability to "roll up" or display the data based on Fund, Org, Project or Program or other chartfields. For example, if you roll up to Program, you will display that Program aggregated at the Program level. If you roll up to Fund, it will aggregate all of the chartfields at the Fund level.
Sort

A report can be sorted by any column. Hover your mouse over the column and two arrows will appear, one pointing up for an ascending sort, and one down for a descending sort.

You may also right-click the column, which will bring up the menu shown in the image below. The second item listed on the menu is the "Sort" feature. This also allows you to sort by multiple columns by choosing the "Add Ascending Sort" or "Add Descending Sort" to the additional columns in your sort.

Rearrange Columns

1. Hover over the column or prompt to be moved, which will display the handlebar.

2. **Grab** the handlebar or prompt and **drag** it to its new location. A light blue line will display, showing you where the column will land as seen in the image below.
3. **Release** the column and the report will rerun to display the results in the manner you have chosen.

![Registrations by Degree Level by School](image1)

**Exclude Columns**

1. **Right click** on the column you would like to “hide” and choose “Exclude Column.”

![Exclude Column](image2)

**Print**

Print the entire dashboard page

1. Printing from the Page Options menu will print the entire dashboard as displayed on your screen. On the right hand side of the screen, underneath the Global Header, there is a three line icon that is the "Page Options" menu.
2. From this menu, select to **Print**.
3. Print format options include either in **Printable PDF** (requires Adobe Acrobat plug-in) or **HTML**.
4. It is recommended to use this print option, as it will print the entire dashboard page, including the prompt selections. So it is clear on the print-out what parameters were used to display the data.

**Print an individual report or graph**

1. Beneath a report or graph, there is a link to "Print".

2. Print format options include either in **Printable PDF** (requires Adobe Acrobat plug-in) or **HTML**.
3. When printing a table, be sure to **display all rows** first.

4. Printing using this method will not print the entire dashboard. It will only print the component of the dashboard immediately above the Print link. Unlike the dashboard print options, it does not include the prompt selections. This could cause other users to misinterpret the data if they do not know the parameters that were used. We therefore always recommend printing the entire dashboard page so that it is clear what parameters were used to display the data.

**Print from BI Publisher**

Several reports (such as the Budget Summary report) are created in BI Publisher. Unlike other Dashboard reports, this type of report is non-interactive and static in order to produce printer-friendly reports. Such reports are indicated with "PDF" in the page name.

To print a BI Publisher report, click the **Print** icon that displays when you hover over the report.

*Problems with BI Publisher- Any field with a "+" symbol will cause the BI Publisher report to not yield any results. This is because the "+" symbol is stripped out when run in the BI Publisher report"s SQL, which yields no results.*
Export

Export from a PC

1. Beneath a report or graph, there is a link to "Export".

2. Export options include:
   a. **PDF**. Exporting is limited to 200,000 records.
   b. **Excel** - Formatting will be maintained. Exporting is limited to 200,000 records.
   c. **PowerPoint 2003 or 2007**
   d. **Web Archive**
   e. **Data** >
      i. **CSV Format** (Comma Separated Values). Limit of 500,000 records with max cell limit of 2,000,000 across formats.
      ii. **Tab delimited Format** - Best Practice. Brings over the raw data (not formatting). Total row count exported.

Exporting to Excel from a Mac

1. **Use the "Export > Data > Tab delimited Format" option and open the file in Excel.**

Exporting BI Publisher Reports

2. For **BI Publisher reports**, such as the **Budget Detail Reports** and **Budget Summary Report PDF**, go to the **Data** tab and click on the gear icon located in the middle of the screen, towards the right.

3. **Choose Export > CSV.**

4. **Choose Open with Microsoft Excel or Save File.**
5. If you choose “Open with”, then choose Microsoft Excel. If you choose “Save File”, then it will download to your “Downloads” area of your computer in CSV format

Contact DSG

The Decision Support Group (DSG) is here to help! DSG provides reporting and analytical assistance to the global UDW+ NYU user community.

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