

# UDW+ Student Registration Pipeline Ad Hoc Reports Training

The UDW+ Registration Pipeline Subject area allows you to create custom ad hoc reports using registration pipeline dates. The [SIS- Registration Pipeline Metadata](#) is available. This training builds upon the instruction you received during the STU 050: UDW+ Student Ad Hoc Reports Classroom Training (pre-requisite).

Once logged into **UDW+**, begin by creating a **new analysis** using the **SIS - Registration Pipeline** subject area.

**Important note: Registration Pipeline date folders** - When creating a registration pipeline ad hoc report, you must select date(s) from one of three folders. You can only use one folder at a time - never “mix and match” data elements from these three folders.

- **Pipeline Dates** = used to display the day/week/term of the calendar year. Can be used to see trends (ie. week prior to the start of classes) for comparative analysis.
- **Pipeline As of Dates** = used to pinpoint activity as of a certain pre-defined date.
- **Current Day Last Year** = folder is pre-coded to display today's day compared to same day in the prior year (relative to the term start date).

The training scenarios below will demonstrate how to use these folders accordingly.

1. Training Scenario #1: Create a report to view the **registered headcount for a census date** for multiple terms (using the **Pipeline Dates** folder).
  - a. Add the following columns to your report from the **Pipeline Dates** folder:
    - i. **Pipeline Date** - displays the day of the calendar year.
    - ii. **Pipeline Term** - displays the term.
    - iii. **Census Flag** - Y/N flag used to determine if the Pipeline Date is census (Y) or not (N)
    - iv. **Registered Headcount** (Fact Registration Pipeline/Headcounts folder)
  - b. Create the following filters:
    - **Pipeline Term** = Spring 2014; Spring 2015; Spring 2016 (when working with census dates, be sure to filter on a “Term” field)
  - c. View your **Results**. Note that majority of the dates are not census. To view the registered headcount on a census date only, create the following filters:
    - **Census Flag** = Y
  - d. **Save** as “Census”. Create a **new folder** titled “Registration Pipeline.”

2. Training Scenario #2: Create a report to view the **registered headcount for current day this year versus same time last year** (using the **Current Day Last Year** folder).

- a. Add the following columns to your report from the **Current Day Last Year** folder:
  - i. **Academic Year** - 4 digit year representing the second calendar year. Equivalent to Fiscal Year.
  - ii. **Term Type** - displays the term(s) associated with the pipeline date. (Depending on the date, this may include one, two or three terms that are active.)
  - iii. **Pipeline Date** - shows date of the calendar year.
  - iv. **Day Number Relative to Term Start Date** - counting backwards or forwards from the start of classes
  - v. **Day Number Relative to Term Registration Start Date** - counting backwards or forwards from the start of registration
  - vi. **Registered Headcount** (Fact Registration Pipeline/Headcounts folder)
- b. When using dates from this folder, the report will automatically display data from the current (today) and last year (same day). Therefore, it is not necessary to create any filters.
- c. View your **Results**. Note that the **Day Number Relative to Term Start Date** remains the same.
- d. **Save** as "Current Day Last Year".

Example: If the report is run on 7/20/16, the **Pipeline Date** for the current term (Summer AY16) shows the date of when the data was last current (yesterday's date) and it is 58 days past the start of Summer AY16 term. The **Pipeline Date** for the same term last year (Summer AY15) shows the date according to the **Day Number Relative to Term Start Date**, (58 days past the start of Summer AY15 term), which is 7/22/16. The **Pipeline Dates** will most likely never be the same, as the number of days to term start date changes each academic year. The **Day Number Relative to Term Start Date** will always be the same, no matter which term you are looking at.

Ran: 07/20/16

Academic Year	Pipeline Date	Term Type	Day Number Relative to Term Start Date	Day Number Relative to Term Registration Start Date	Registered Headcount
2015	7/22/2015	Summer	58.00	156.00	
2016	7/15/2015	Fall	-48.00	87.00	
	7/19/2016	Summer	58.00	155.00	
2017	7/19/2016	Fall	-48.00	100.00	

3. Training Scenario #3: Create a report to view the **registered headcount, de-registered headcount, and pending registration headcount** for a specific term, for the **same date this year and last year** (using the **Pipeline As of Date** folder).

- a. Add the following columns to your report from the **Pipeline As of Date** folder:
  - i. **Registration Pipeline as of Date** - can select multiple dates for comparative analysis (headcounts can change daily).
  - ii. **Term** - displays the term.
  - iii. **Registered Headcount** (Fact Registration Pipeline/Headcounts folder)
  - iv. **De-Registered Headcount** (Fact Registration Pipeline/Headcounts folder)
  - v. **Eligible and Not Registered Headcount** (Fact Registration Pipeline/Headcounts folder)= students who are eligible to enroll, but did not.
- b. Create the following filters:
  - i. **Registration Pipeline as of Date** = today's date in 2015 and today's date in 2016 (i.e. 7/18/2015; 7/18/2016)
  - ii. **Term** = Spring 2016 (it is highly recommended to filter on a Term, otherwise the results will display the data for every term stored).
- c. View your **Results**.
- d. **Save** as "Pipeline As Of Date".

4. Training Scenario #4: Create a report to view the **most current registered headcount, pending registration headcount and de-registered headcount** using the **Current Flag**.

- a. Continuing with the example created in Training Scenario #3: **Delete** the following from your report:
  - i. **Registration Pipeline as of Date column** - instead of viewing the headcount as of a specific date, we want to see the most current data, and therefore this column and associated filter are not needed.
  - ii. **Registration Pipeline as of Date filter**
- b. **Add** the following column to your report:  
**Current Flag** (Pipeline As of Date folder)
- c. **Create** the following filters:
  - i. **Current Flag** = Y (When using the Current Flag, you must filter on a Term, otherwise the results will display the data for every term stored).
- d. View your **Results**.  
Note: This shows the same results as the previous exercise; it's just a different way to achieve the same results without having to modify your filter.
- e. **Save As** "Current Flag".

5. Training Scenario #5: Create a report to view the **registered headcount compared to the registration goals** for a semester, **starting 20 days before the start of classes through 10 days after the start of classes**.

a. Create a **new analysis** using the **SIS - Registration Pipeline** subject area and add the following columns to your report from the **Pipeline Dates** folder:

- i. **Pipeline Term**
- ii. **Day Number Relative to Term Start Date**
- iii. **Pipeline Date**
- iv. **Registered Headcount** (Fact Registration Pipeline/Headcounts folder)
- v. **Registration Goals** (Fact Registration Pipeline/Goal folder) - submitted by the Office of Institutional Research once they are available, starting in Fall 2012.

b. Create the following filters:

. **Day Number Relative to Term Start Date** is between -20 and 10.

i. **Pipeline Term** = Spring 2016

c. View your **Results**.

. Day 1 is first day of Classes.

d. Add a **Line Graph** to view the results graphically.

- . **Lines (Vertical Axis)** = Registered Headcount, Registration Goals
- i. **Group By (Horizontal Axis)** = Day Number Relative to Term Start Date
- ii. **Vary Color By** = Pipeline Term
- iii. **Exclude** = Pipeline Date
- iv. Click on “Done” in upper right hand corner.

e. **Save** as “Day Number Relative to Term Start Date”.

6. Training Scenario #6: Create a report to view **student headcount** and their **Financial Clearance Status** for **today and same day last year**.

a. Create a **new analysis** using the **SIS - Registration Pipeline** subject area and add the following columns to your report from the **Current Day Last Year** folder:

- i. **Term Type**
- ii. **Pipeline Date** - yields results from today and same day last year (relative to term start date)

b. Add the following column to your report from the **Financial Clearance** folder:

. **Financial Clearance Status** - used to view the financial status for a student including financially cleared, not financially cleared, and temporarily cleared.

c. Add the following fact to your report from the **Fact Registration**

**Pipeline/Headcounts** folder folder:

. **Student Headcount**

Note: When using dates from the “Current Day Last Year” folder, they will automatically display data from the current (today) and last year (same day). Therefore, it is not necessary to create any additional filters.

d. View your **Results**.

e. If needed, a filter on a specific **Financial Clearance Status** may be added.

i. Create filter where **Financial Clearance Status** = Not Clear

f. To get the list of students that are not financially cleared, add the **Full Name** column (from the Student folder).

g. View your **Results**.

**Financial Status:**

Not Available= students who are financially cleared and who *did not* receive financial aid.

Clear= students who are financially cleared who *did* receive financial aid

Not Clear= not financially cleared

Temp Clear= temporarily cleared

- h. **Save** as “Financial Clearance Status”.
- i. **Please note:** you may also use the facts available in the Fact Registration Pipeline/Headcount folder: **Financially Cleared, Not Financially Cleared and Temporarily Cleared Headcounts.**

7. Training Scenario #7: Create a report to view the students who are currently enrolled and **entered a school in a given term** using **Entry Group** folder. (i.e. list of students who are currently Juniors who transferred to Gallatin internally in the Fall 2015)

a. Create a **new analysis** using the **SIS - Registration Pipeline** subject area and add the following columns to your report from the **Pipeline As of Date** folder:

- i. **Registration Pipeline as of Date**
- b. Add the following columns to your report from the **Student Term Attributes** folder:
  - i. **Academic Level BoT** (in Categories sub-folder)
  - ii. **Full Name** (Student folder)
  - iii. **Registration Status**
- c. Add the following columns to your report from the **Entry Group** folder:
  - i. **Entry Group Academic Group**= school in which student originated or enters into
  - ii. **Entry Group New Continuing Type**= student’s status (e.g. New Freshman, New Internal Transfer, New Non-Matric, etc.)
  - iii. **Entry Group Registration Status**= E, L, M, N, R, S, W, X
  - iv. **Entry Group Term**: term the student entered in the entering school
- d. Create the following filters:
  - i. **Registration Status** = Enrolled
  - ii. **Registration Pipeline as of Date** = today’s date
  - iii. **Academic Level BoT** = Junior
  - iv. **Entry Group Academic Group** = Gallatin Schl Individual Stdy (school that student is currently in)
  - v. **Entry Group New Continuing Type** = New Internal Transfer
  - vi. **Entry Group Term** = Fall 2015
- e. View your **Results**.
- f. Add **New View- Filters**.
- g. **Save** as “Entry Group”.

8. Housing Deposits data in UDW+:

The data captured in UDW+ shows whether a housing deposit was received for a student. UDW+ does not yet capture whether a student has completed their housing application. Therefore, housing deposits data alone should not be used to determine whether a student will be housed at NYU.

9. IR Categories folder:

The IR Categories folder contains files for custom use by IR, if needed.

10. Additional Training Scenario to practice on your own:

Create a report to view the number of students registered, pending registration, de-registered and dropped, once registration begins and for 30 days thereafter for the upcoming term.

- a. Add the following columns to your report from the **Pipeline Dates** folder:
  - i. **Day Number Relative to Term Registration Start Date**
  - ii. **Pipeline Date**
  - iii. **Pipeline Term**
  - iv. **Registered Headcount** (Fact Registration Pipeline/Headcounts folder)
  - v. **Pending Registration Headcount** (Fact Registration Pipeline/Headcounts folder)
  - vi. **De-Registered Headcount** (Fact Registration Pipeline/Headcounts folder)
  - vii. **Dropped Headcount** (Fact Registration Pipeline/Headcounts folder)
- b. Create the following filters:
  - i. **Day Number Relative to Term Registration Start Date** is between 1 and 30.
    - i. **Pipeline Term** = Fall 2016
- c. View your **Results**. Day 1 is first day of Registration.

Note: Dates 11/24/16-11/29/16= registration headcount is not accurate. There was a problem that occurred with the data warehouse where it did not capture all students who registered, and just showed "6,915" instead.

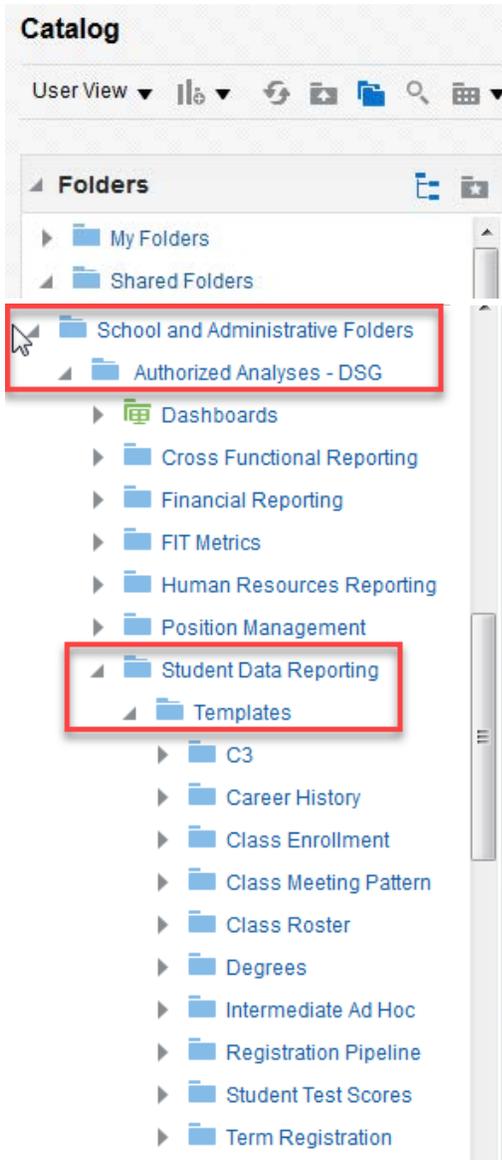
- d. Add a **Line Graph** to view the results graphically.
  - i. **Lines** = Registered Headcount, Pending Registration Headcount, De-Registered Headcount, Dropped Headcount
  - ii. **Group By** (Horizontal Axis) = Day Number Relative to Term Registration Start Date
  - iii. **Vary Color By** = Pipeline Term
  - iv. **Exclude** = Pipeline Date
  - v. Click **Done**
- e. **Save** this report in your personal training folder.

Note: Class enrollment information is not currently available in Registration Pipeline.

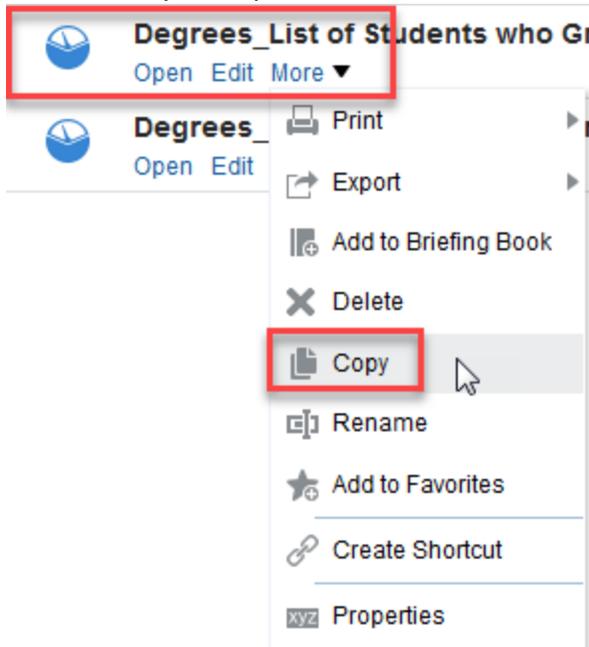
## Authorized Analyses- DSG

UDW+ Ad Hoc Templates are available for your use!

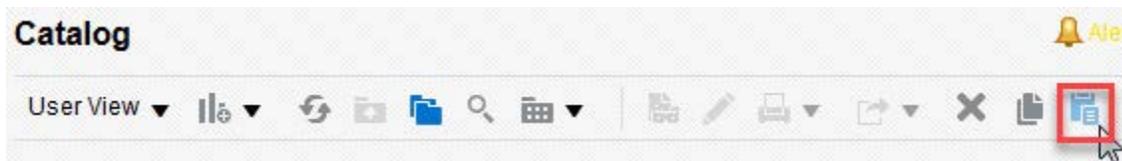
1. Go to **Catalog**→**Shared Folders**→ **School and Administrative Folders** → **Authorized Analyses-DSG** → **Student Data Reporting**→ **Templates**.



2. Find *your report* and choose More → Copy.



3. Go to **My Folders** and either Right-Click and choose **Paste** or choose the **Paste** icon in the Catalog header.



4. Go to report in **My Folders** and choose **Edit**.
5. **Change the filter** on Plan Code to suit your needs. Or Delete filter and filter by Plan.
6. **Run Results**.

## **Contact**

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



- Email: [askDSG@nyu.edu](mailto:askDSG@nyu.edu)
- Phone: 212-998-2900
- Web: [www.nyu.edu/datawarehouse/dsg](http://www.nyu.edu/datawarehouse/dsg)
- DSG Knowledge Base: Dashboards→ UDW+ Help→ Knowledge Base Articles
  - UDW+ FAQs
  - UDW+ System Requirements
  - UDW+ Training and Access



For assistance, contact the **[Decision Support Group](#)** at [askdsg@nyu.edu](mailto:askdsg@nyu.edu) or 212-998-2900.