



UDW+ Student Ad Hoc Retention Subject Area Curriculum

Version 1.0

Program Services Office & Decision Support Group

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SIS - Retention

Analyze a **cohort** (a group of students who enter NYU at a specific point in time) using different demographic, social, academic, and other facts. Allows the Office of Institutional Research and Data Integrity (and other advanced users at the University) to improve their understanding of patterns of **student progression, characteristics of student cohorts who persist or leave, predictive modeling, and student success measurements**. Updated after each official census to identify changes in enrollment status and other attributes.

SIS – Retention Summary

Use this subject area to query **high level summary data**. Tracks summary cohort counts based on term, school, new/continuing type, degree and first time full time flag. It **does not contain student level details**.

The UDW+ Retention subject area allows users to create custom ad hoc reports to track student cohort retention based on term, school, new/continuing type, degree and first-time-full-time flag.

UDW+ Retention data provides users with the ability to analyze a cohort (a group of students) who enter NYU at a specific point in time using different demographic, social, academic (including academic program) and other facts. Cohort analysis is used to understand the characteristics of students entering at a specific time as well as for predictive modeling and student success measurements.

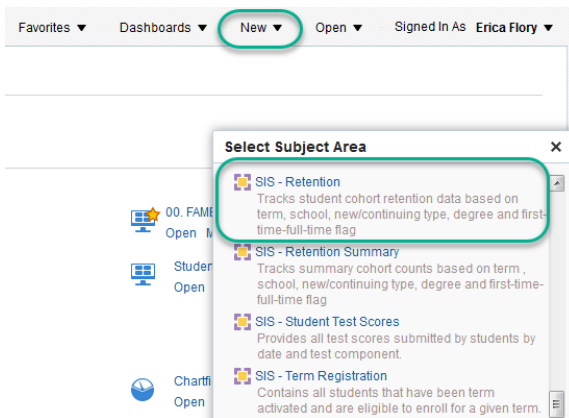
Retention data is updated after each official census to identify changes in enrollment status and other attributes. The main goal of this subject area is to allow the Office of Institutional Research and Data Integrity, as well as School IR users, to improve their understanding of patterns of student progression and success. This helps policy-makers at the University focus on efforts to improve student success and other areas of achievement. It is also used to model who is likely to retain and persist and what the characteristics are of those who persist and those who leave the University before graduating.

The grain for the UDW+ Retention subject area is Term of Entry SIS ID, Cohort Code and Retention Term (one student per cohort code per retention term).

Additional metadata about the UDW+ Retention subject area can be found on the [UDW+ Retention subject area metadata](#).

Retention Subject Area

Create a **New - Analysis** using the **SIS - Retention** subject area.



View the term of entry headcount for a specific cohort

A **cohort** is a discrete group of students defined by a combination of Term of Entry (TOE) attributes:

- Term
- New / Continuing Type (New Freshmen, New Internal Transfer, New External Transfer, etc.)
- School
- Degree Level
- FTFFT (First Time / Fall Full Time Flag)

1. Add the following columns to your report:

- Cohort Term of Entry** (Cohort folder) = term when student entered
- Cohort School** (Cohort folder) = school of entry (please note that school names may have changed throughout the years ie. Poly-Tandon, SCPS-SPS. Use the school name at that time of census. Therefore, it is advised to use the school code to view cohorts for prior years)
- Cohort School Code** (Cohort folder) = code for school of entry
- Cohort New Continuing Type** (Cohort folder) = New Freshmen, New Bachelors, New Master, New Doctoral, and others.
- Cohort New Continuing Type Code** (Cohort folder) = N, NAS, NOD, etc.
- Cohort Degree Level** (Cohort folder) = Undergraduate or Graduate
- TOE First Time Full Time Flag (IPEDS GRS)** (from Cohort folder) = only for students entering in Summer semester and First Time Full time in the Fall. *When running adhoc queries in SIS Retention Subject Area, is important to include one of two required field(s) in the criteria, 'Cohort Code' or 'TOE First Time Full Time Flag (IPEDS GRS)'.*
- Cohort Status** (Cohort Status folder) = Academic Dismissal, Enrolled, Graduated and Not Enrolled
- Term** (Term folder) = the term as of which you want to see the headcount
- Student Cohort Headcount** (Retention Detail Facts folder.

2. Create the following filters using a sample cohort of Fall 2009, SCPS, New Other Degree:

- Cohort Term of Entry** = Fall 2009
- Cohort School Code** = SCPS (please note that the school name for SCPS has since changed, however codes rarely change)
- Cohort New Continuing Type Code** = NOD (New Other Degree)
- Cohort Degree Level Code** = GR (Graduate)
- Term** = Fall 2009

3. View your **Results**.
4. Save your analysis. Create a **new folder** titled “LDB Training.” **Save** as “TOE Headcount by Cohort”.

Cohort Term of Entry	Cohort School	Cohort School Code	Cohort New Continuing Type Code	Cohort New Continuing Type	Cohort Degree Level	Cohort Degree Level Code	TOE First Time Full Time Flag (IPEDS GRS)	Cohort Status	Term	Student Cohort Headcount
Fall 2009	Schl of Continuing & Prof Stud	SCPS	NOD	New Other Degree	Graduate	GR	N	Enrolled	Fall 2009	
								Not Enrolled	Fall 2009	

View the retention for a specific cohort

1. Create a **New Analysis** using the **SIS - Retention** subject area.
2. Add the following columns to your report:
 - a. **Cohort** (Cohort folder) = comprised of term, school. term, school, new/continuing type, degree, first-time-full-time flag.
 - b. **Cohort Code** (Cohort folder)
 - c. **Term** (Term folder)
 - d. **Term Code** (Term folder)
 - e. **Cohort Status** (Cohort Status folder)
 - f. **Student Cohort Headcount** (Retention Detail Facts folder)
3. Create the following filters using a sample cohort of Fall 2009, SPS, New Other Degrees, Graduate:
 - a. **Cohort Code** = 1098-SCPS-NOD-GR-N
4. View your **Results**. *Notice that headcount numbers for Fall 2009 match with results from Training Scenario #1.*
5. **Save As** “Retention by Cohort”.

Cohort	Cohort Code	Term	Term Code	Cohort Status	Student Cohort Headcount
Fall 2009-Schl of Continuing & Prof Stud-New Other Degree-Graduate	1098-SCPS-NOD-GR-N	Fall 2009	1098	Enrolled	
				Not Enrolled	
		Fall 2010	1108	Enrolled	
				Graduated	
				Not Enrolled	
		Fall 2011	1118	Enrolled	
				Graduated	
				Not Enrolled	
		Fall 2012	1128	Enrolled	
				Graduated	

Pivot Table to view the trend in retention for a cohort

1. Continuing with the report created above, add a **Pivot Table** view.
2. **Edit** the newly added Pivot Table.
 - a. **Cohort** Move to **Columns** section: **Term** and **Term Code** (place Term Code above the Term column for an automatic sort by Term Code)
 - b. Add **Sum** on **Cohort**.
 - c. You can “**hide**” the Student Cohort Headcount Measure Label
3. Click **Done**.
4. You may “**Remove**” the **Table** from your Compound Layout view, and only work with the **Pivot Table**.
5. **Save As** “Retention by Cohort Pivot”.

Pivot Table

			Student Cohort Headcount																
			1098	1102	1104	1106	1108	1112	1114	1116	1118	1122	1124	1126	1128	1132	1134	1136	1138
Cohort	Cohort Code	Cohort Status	Fall 2009	Winter 2010	Spring 2010	Summer 2010	Fall 2010	Winter 2011	Spring 2011	Summer 2011	Fall 2011	January 2012	Spring 2012	Summer 2012	Fall 2012	January 2013	Spring 2013	Summer 2013	Fall 2013
Fall 2009- Schi of Continuing & Prof Stud-New Other Degree- Graduate	1098- SCPS- NOD- GR-N	Enrolled																	
		Graduated																	
		Not Enrolled																	

View the retention of a cohort by school

1. Continuing with the report created above, go to the **Criteria** tab and edit the following filters:
 - a. **Cohort Code** = 1098-TISCH-NFR-UG-N
2. Add the following columns to your report:
 - a. **School Status** (CPP Status (Original / Other) folder) = ORIG (school at time of entry) or OTHR (transferred school)
3. View your **Results**.
4. To view which school the student went to, drag & drop the following column directly into your pivot table after the School Status column :
 - a. **School** (CPP> Organization Out Terms) to see the school of the student’s primary plan
 - b. **Save As** “Retention of Cohort by School”.

						Student Cohort Headcount									
						1098	1102	1104	1106	1108	1112	1114	1116	1118	1122
Cohort	Cohort Code	Cohort Status	School Status	Plan Academic Group	School	Fall 2009	Winter 2010	Spring 2010	Summer 2010	Fall 2010	Winter 2011	Spring 2011	Summer 2011	Fall 2011	January 2012
Fall 2009-Tisch School of the Arts-New Freshman- Undergraduate	1098- TISCH- NFR- UG-N	Enrolled	ORIG	Tisch Schi of the Arts UG	Tisch School of the Arts										
				Tisch School of the Arts	Tisch School of the Arts										
		Graduated	ORIG	Tisch School of the Arts	Tisch School of the Arts										
		Not Enrolled	ORIG	Tisch School of the Arts	Tisch School of the Arts										

View the retention of a cohort by Plan

1. Continuing with the report created above, return to the **Criteria** tab and delete the following columns:
 - a. **School Status**
 - b. **School**
2. Add the following columns to your report:
 - a. **Plan Status** (CPP Status (Original / Other) folder) = Original (plan at time of entry) or Other (transferred plan) by Primary plan only. Using the data elements in the CPP folder, the same analysis can be done to view the retention of a cohort by **Organization** and **Program** as well.
 - b. **TOE Primary Plan** (CPP> CPP TOE folder) = TOE Primary Plan
 - c. **Primary Plan** (CPP> CPP Out Terms folder) = Primary Plan (during selected term)
3. View your **Results**.
4. To narrow your results to a specific plan, return to the **Criteria** tab and create the following filter:
 - a. **TOE Primary Plan** = Cinema Studies
5. View your updated **Results**.
 - a. If needed, you can add student identifiable information from the **Student** and/or **Demographics** folders (ie if you want to see the list of students that are part of the cohort you're tracking)
6. **Save As** "Retention of Cohort by Plan".

Pivot Table

						Student Cohort Headcount									
						1098	1102	1104	1106	1108	1112	1114	1116	1118	1122
Cohort	Cohort Code	Cohort Status	Plan Status	TOE Primary Plan	Primary Plan	Fall 2009	Winter 2010	Spring 2010	Summer 2010	Fall 2010	Winter 2011	Spring 2011	Summer 2011	Fall 2011	January 2012
Fall 2009-Tisch School of the Arts-New Freshman-Undergraduate	1098-TISCH-NFR-UG-N	Enrolled	ORIG	Cinema Studies	Cinema Studies										
			OTHR	Cinema Studies	Film and Television										
	Graduated	ORIG	Cinema Studies	Cinema Studies											
		OTHR	Cinema Studies	Film and Television											
	Not Enrolled	ORIG	Cinema Studies	Cinema Studies											
		OTHR	Cinema Studies	Film and Television											

Understanding the Term folder

1. Create a **New Analysis** using the **SIS - Retention** subject area.
2. Add the following columns to your report:
 - a. **Academic Year**
 - b. **Retention Year Number**: Year relevant to cohort entry term
 - c. **Retention Term Number**: Term code (Fall = 1, Winter= 2, Spring= 3, Summer= 4)
 - d. **Term** = Long description
 - e. **Term Code** = Short description
 - f. **Term Type** = Fall, Winter, Spring, Summer
 - g. **GRS Year** = Graduation Rate Survey Year (aggregated reporting on summer and fall new freshmen who are first-time-full-time students). *Only works with those who have "Y" in **TOE First Time Full Time Flag (IPEDS GRS)**.
3. Add the following filter without adding the column:
 - a. **Cohort Code** = filter to any cohort going back a few years
4. View **Results**.
5. Add in the **Filters** view.
6. **Save** report as "Terms folder".

Academic Year	Retention Year Number	Retention Term Number	Term	Term Code	Term Type	GRS Year
2010	1.00	1.00	Fall 2009	1098	Fall	1.00
		2.00	Winter 2010	1102	Winter	-14.00
		3.00	Spring 2010	1104	Spring	-14.00
		4.00	Summer 2010	1106	Summer	2.00
2011	2.00	1.00	Fall 2010	1108	Fall	2.00
		2.00	Winter 2011	1112	Winter	-14.00
		3.00	Spring 2011	1114	Spring	-14.00
		4.00	Summer 2011	1116	Summer	3.00
2012	3.00	1.00	Fall 2011	1118	Fall	3.00
		2.00	January 2012	1122	January	-14.00
		3.00	Spring 2012	1124	Spring	-14.00
		4.00	Summer 2012	1126	Summer	4.00
2013	4.00	1.00	Fall 2012	1128	Fall	4.00
		2.00	January 2013	1132	January	-14.00
		3.00	Spring 2013	1134	Spring	-14.00
		4.00	Summer 2013	1136	Summer	5.00
2014	5.00	1.00	Fall 2013	1138	Fall	5.00
		2.00	January 2014	1142	January	-14.00
		3.00	Spring 2014	1144	Spring	-14.00
		4.00	Summer 2014	1146	Summer	6.00

Compare the 16 year Retention Trend across three cohorts

1. Create a **New Analysis** using the **SIS - Retention** subject area.
2. Add the following columns to your report:

Under Term folder:

- a. **Retention Year Number**
- b. **Retention Term Number**
- c. **Term Type**

Under Cohort folder:

- d. **Cohort Term of Entry**
- e. **Cohort School**
- f. **Cohort New Continuing Type**
- g. **Cohort Degree Level**
- h. **TOE First Time Full Time Flag (IPEDS GRS)**

Under Retention Detail Facts:

- i. **Student Cohort Headcount**
3. Create the following filters using three sample cohorts of Fall 2002, 2003, 2004, Tisch School of the Arts, New Freshmen, Undergraduate:
 - a. **Cohort Term of Entry** = Fall 2002; Fall 2003; Fall 2004
 - b. **Cohort Status Code**= E (Enrolled) (*note that you can add a filter without adding the column*)
 - c. **Cohort School Code** = TISCH
 - d. **Cohort New Continuing Type Code** = NFR (New Freshmen)
 - e. **Term Type** (Retention Term) = Fall, Spring (*in this example we only want to track retention for the Fall and Spring semesters*)
 - f. **TOE First Time Full Time Flag (IPEDS GRS)** = N
 4. Run **Results**. You may reorganize the columns to make it easier to read (i.e. move the Cohort Term of Entry column to be first).
 5. Add a **Pivot Table** view to display the year over year retention trend.
 6. **Edit** the Pivot Table as follows:
 - a. **Exclude**: Cohort Degree Level, Retention Term Number, TOE First Time Full Time Flag, Cohort New Continuing Type,
 - b. Move to **Columns**: Cohort School & Code, Cohort Term of Entry
 7. Click **Done**.

Note: Using the Student Cohort Headcount, it is possible to create a calculated item to display the retention percentage. This requires more advanced knowledge of UDW+ ad hoc reporting. The UDW+ Retention dashboard will display retention trends by headcount and percentage.

8. You may **“Remove”** the **Table** from your Compound Layout view, and only work with the **Pivot Table**.
9. Add a **Filters** view to display all the filters being applied to the report (most helpful when many columns are excluded from view).
10. **Save As** “16 Year Retention Trend”.

Filters [A] ✎ ✕

Cohort Term of Entry is equal to **Fall 2002, Fall 2003, Fall 2004**
and Cohort Status Code is equal to / is in **E**
and Cohort School Code is equal to / is in **TISCH**
and Cohort New Continuing Type Code is equal to / is in **NFR**
and Term Type is equal to **Fall, Spring**
and TOE First Time Full Time Flag (IPEDS GRS) is equal to / is in **N**

		TISCH		
		Tisch School of the Arts		
		Student Cohort Headcount		
Retention Year Number	Term Type	Fall 2002	Fall 2003	Fall 2004
1.00	Fall			
	Spring			
2.00	Fall			
	Spring			
3.00	Fall			
	Spring			
4.00	Fall			
	Spring			
5.00	Fall			
	Spring			
6.00	Fall			
	Spring			
7.00	Fall			
	Spring			
8.00	Fall			

Compare the 16 Year Retention Trend across three cohorts, for their international students

1. Create a **New Analysis** using the **SIS - Retention** subject area.
2. Add the following columns to your report:
3. Continuing with the report created above, return to the **Criteria** tab and add the following columns to your report:
 - a. **TOE IPEDS Ethnicity Group & Code** (Student > Demographics > Demographics TOE folder)
4. Create the following filter:
 - a. **TOE IPEDS Ethnicity Group** = Intl (If using TOE IPEDS Ethnicity Group Code: 9 = International, all others are domestic)
5. Run **Results**.
6. You may modify the pivot table as needed (either exclude the TOE IPEDS Ethnicity Group from view, or move it to columns section).
7. **Save As** "Retention Trend for International Students".

Cohort Term of Entry is equal to **Fall 2002, Fall 2003, Fall 2004**
and Cohort Status Code is equal to / is in **E**
and Cohort School Code is equal to / is in **TISCH**
and Cohort New Continuing Type Code is equal to / is in **NFR**
and Term Type is equal to **Fall, Spring**
and TOE First Time Full Time Flag (IPEDS GRS) is equal to / is in **N**
and TOE IPEDS Ethnicity Group Code is equal to / is in **9**

			TISCH		
			Tisch School of the Arts		
			Student Cohort Headcount		
TOE IPEDS Ethnicity Group	Retention Year Number	Term Type	Fall 2002	Fall 2003	Fall 2004
International	1.00	Fall			
		Spring			
	2.00	Fall			
		Spring			
	3.00	Fall			
		Spring			
	4.00	Fall			
		Spring			

View the one year percent retention rate of International and Domestic Freshmen

1. A report to view the one year percent retention rate of International and Domestic Freshmen (can be used for IPEDS) has been created for you.
2. To view the report, **copy** and **paste** the [following XML code](#) into the “**Analysis XML**” section of the “**Advanced**” tab, replacing any existing XML code in that section. Click **Apply XML**.

The screenshot shows the Oracle BI interface with the 'Advanced' tab selected. The 'Analysis XML' section contains the following XML code:

```
<saw:report xmlns:saw="com.siebel.analytics.web/report/v1.1" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="saw:report" subjectArea="SIS - Retention" >
  <saw:criteria xsi:type="saw:simpleCriteria" subjectArea="SIS - Retention" >
    <saw:columns>
      <saw:column xsi:type="saw:regularColumn" columnID="cf64fa849eb8d57fc">
        <saw:columnFormula>
          <sawx:expr xsi:type="sawx:sqlExpression">"Cohort Retention Term".</sawx:expr>
        </saw:columnFormula>
      </saw:column>
      <saw:column xsi:type="saw:regularColumn" columnID="ce6c566535c16b61a">
        <saw:columnFormula>
          <sawx:expr xsi:type="sawx:sqlExpression">"Cohort Retention Term".</sawx:expr>
        </saw:columnFormula>
      </saw:column>
      <saw:column xsi:type="saw:regularColumn" columnID="c9a9629d3dec623c9">
        <saw:columnFormula>
          <sawx:expr xsi:type="sawx:sqlExpression">"Retention Term" "Term I"</sawx:expr>
        </saw:columnFormula>
      </saw:column>
    </saw:columns>
  </saw:criteria>
</saw:report>
```

Below the XML code, there is a checkbox for 'Bypass Oracle BI Presentation Services Cache' and a 'Partial Update' dropdown menu set to 'Default'. The 'Apply XML' button is located at the bottom right of the section.

Catalog

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

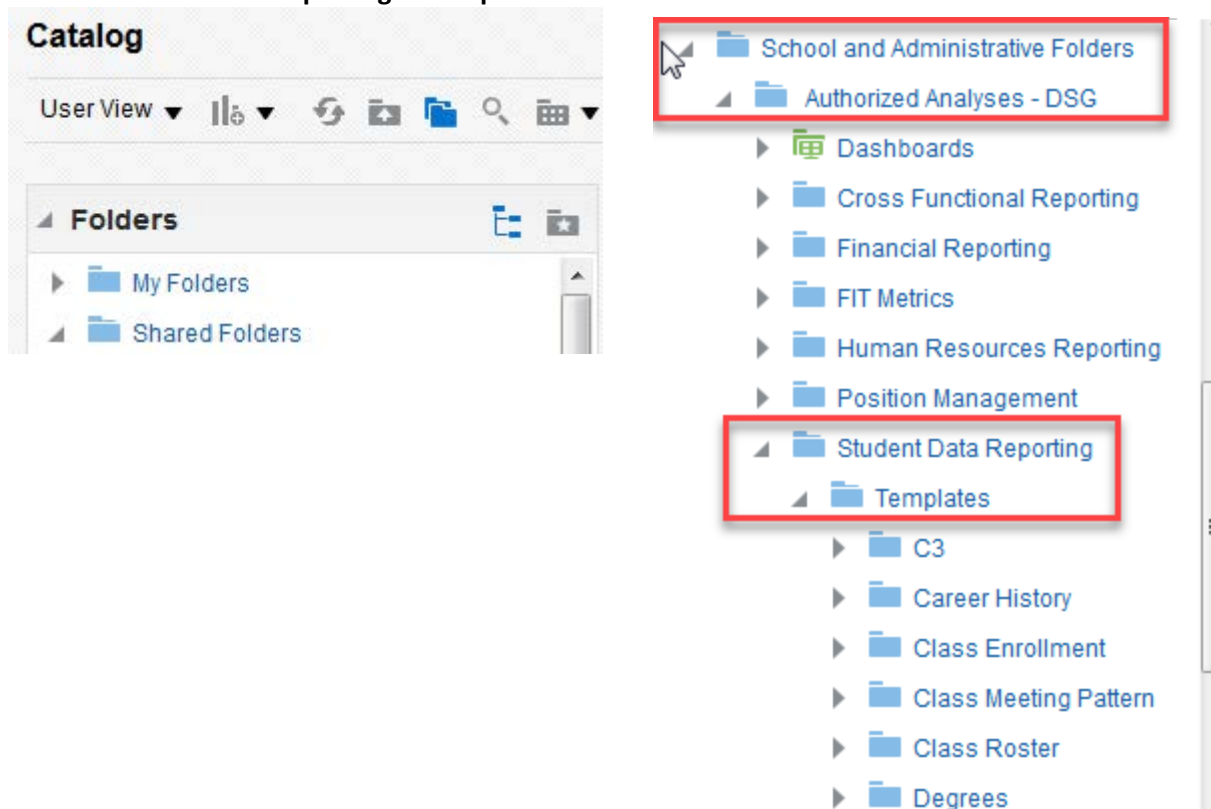
- To **access** your saved analyses, click on **Catalog** in the header row.
- Expand **Shared Folders** by clicking on the + sign. Find your analysis and click **Edit**.

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:

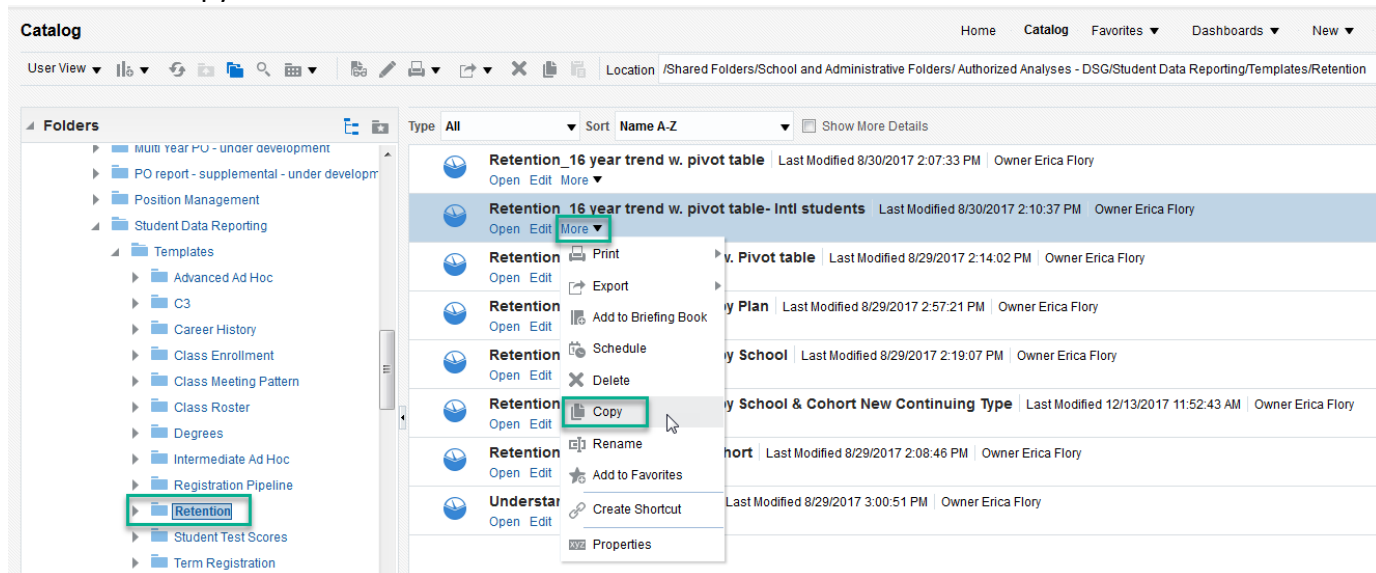
Actor	Action in School and Admin Folders
Anyone	Open and Run
Ad Hoc Users	Copy and Paste to “My Folders” Edit in "My Folders"
Designated analysts	Edit and Save
DSG	Delete and Rename

Authorized Analyses- DSG

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



2. Find *Degrees_List of Students who graduated by Plan Code and Term* analysis and choose More → Copy.



3. Go to **My Folders** and choose **Paste**  from the **Views** section or from the **Catalog** Header



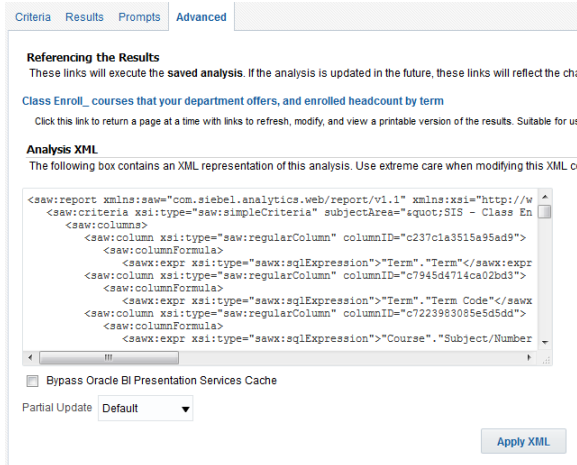
4. Go to report in **My Folders** and choose **Edit**.
5. **Change the filters** to suit your needs.
6. **Run Results**.

XML Code

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

Obtaining and Sending XML Codes:

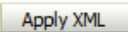
1. In your analysis, go to the **Advanced** tab.
2. Under **Analysis XML**, highlight and copy the entire section (Ctrl+A to select all and Ctrl+C to copy).



3. **Paste it into Notepad or MS Word.** Then send an email to the appropriate person and send as an attachment.

Applying XML Codes:

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

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

Edit and Analyze Retention Dashboard

Analyze= keeps prompt filters

Edit= does not keep prompt filters

Save to your "My Folders"

[Analyze](#) - [Edit](#) - [Refresh](#) - [Print](#) - [Export](#) - [Copy](#)



**Congratulations! You have successfully completed
UDW+ Student Ad Hoc Retention Subject Area Curriculum!**

Access

If you have completed **STU 050: UDW+ Student Ad Hoc Reports Beginner Classroom Training**, then you already have access to the Retention subject area.

Additional Courses

STU 051: UDW+ Ad Hoc Reports Online Video Tutorials

STU 060: UDW+ Ad Hoc Reports Intermediate Classroom Training

Description: Learn intermediate functionality of UDW+ for ad hoc student reporting and analysis.
Receive hands-on training in:

- Graphs
- Formulas
- Functions
- In-Column filters & AND/OR filters
- "Based on the results of another analysis" filter
- Bins (custom groupings)
- Combining Subject Areas

Duration: 2.5 hours

Frequency: Bi-monthly

Contact

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

- Email: askDSG@nyu.edu
- Phone: 212-998-2900
- Web: www.nyu.edu/datawarehouse/dsg

