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:
   a. **Cohort Term of Entry** (Cohort folder) = term when student entered
   b. **Cohort School** (Cohort folder) = school of entry (please note that school names may have changed throughout the years i.e. 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)
   c. **Cohort School Code** (Cohort folder) = code for school of entry
   d. **Cohort New Continuing Type** (Cohort folder) = New Freshmen, New Bachelors, New Master, New Doctoral, and others.
   e. **Cohort New Continuing Type Code** (Cohort folder) = N, NAS, NOD, etc.
   f. **Cohort Degree Level** (Cohort folder) = Undergraduate or Graduate
   g. **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)’.*
   h. **Cohort Status** (Cohort Status folder) = Academic Dismissal, Enrolled, Graduated and Not Enrolled
   i. **Term** (Term folder) = the term as of which you want to see the headcount
   j. **Student Cohort Headcount** (Retention Detail Facts folder).

2. Create the following filters using a sample cohort of Fall 2009, SCPS, New Other Degree:
   a. **Cohort Term of Entry** = Fall 2009
   b. **Cohort School Code** = SCPS (please note that the school name for SCPS has since changed, however codes rarely change)
   c. **Cohort New Continuing Type Code** = NOD (New Other Degree)
   d. **Cohort Degree Level Code** = GR (Graduate)
   e. **Term** = Fall 2009
3. View your Results.
4. Save your analysis. Create a new folder titled “LDB Training.” Save as “TOE Headcount by Cohort”.

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”.
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”.

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”.

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 (transfered 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”.

[Table and Pivot Table]
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”.

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>Retention Year Number</th>
<th>Retention Term Number</th>
<th>Term</th>
<th>Term Code</th>
<th>Term Type</th>
<th>GRS Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>1.00</td>
<td>1.00</td>
<td>Fall 2009</td>
<td>1098</td>
<td>Fall</td>
<td>1.00</td>
</tr>
<tr>
<td></td>
<td>2.00</td>
<td>1102</td>
<td>Winter 2010</td>
<td></td>
<td>Winter</td>
<td>-14.00</td>
</tr>
<tr>
<td></td>
<td>3.00</td>
<td>1104</td>
<td>Spring 2010</td>
<td>1105</td>
<td>Spring</td>
<td>-14.00</td>
</tr>
<tr>
<td></td>
<td>4.00</td>
<td>1105</td>
<td>Summer 2010</td>
<td></td>
<td>Summer</td>
<td>2.00</td>
</tr>
<tr>
<td>2011</td>
<td>2.00</td>
<td>1.00</td>
<td>Fall 2010</td>
<td>1108</td>
<td>Fall</td>
<td>2.00</td>
</tr>
<tr>
<td></td>
<td>2.00</td>
<td>1112</td>
<td>Winter 2011</td>
<td></td>
<td>Winter</td>
<td>-14.00</td>
</tr>
<tr>
<td></td>
<td>3.00</td>
<td>1114</td>
<td>Spring 2011</td>
<td>1115</td>
<td>Spring</td>
<td>-14.00</td>
</tr>
<tr>
<td></td>
<td>4.00</td>
<td>1116</td>
<td>Summer 2011</td>
<td></td>
<td>Summer</td>
<td>3.00</td>
</tr>
<tr>
<td>2012</td>
<td>3.00</td>
<td>1.00</td>
<td>Fall 2011</td>
<td>1118</td>
<td>Fall</td>
<td>3.00</td>
</tr>
<tr>
<td></td>
<td>2.00</td>
<td>1122</td>
<td>January 2012</td>
<td>1123</td>
<td>January</td>
<td>-14.00</td>
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<tr>
<td></td>
<td>3.00</td>
<td>1124</td>
<td>Spring 2012</td>
<td>1125</td>
<td>Spring</td>
<td>-14.00</td>
</tr>
<tr>
<td></td>
<td>4.00</td>
<td>1125</td>
<td>Summer 2012</td>
<td></td>
<td>Summer</td>
<td>4.00</td>
</tr>
<tr>
<td>2013</td>
<td>4.00</td>
<td>1.00</td>
<td>Fall 2012</td>
<td>1128</td>
<td>Fall</td>
<td>4.00</td>
</tr>
<tr>
<td></td>
<td>2.00</td>
<td>1132</td>
<td>January 2013</td>
<td>1133</td>
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<td>-14.00</td>
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<tr>
<td></td>
<td>3.00</td>
<td>1134</td>
<td>Spring 2013</td>
<td>1135</td>
<td>Spring</td>
<td>-14.00</td>
</tr>
<tr>
<td></td>
<td>4.00</td>
<td>1135</td>
<td>Summer 2013</td>
<td></td>
<td>Summer</td>
<td>5.00</td>
</tr>
<tr>
<td>2014</td>
<td>5.00</td>
<td>1.00</td>
<td>Fall 2013</td>
<td>1138</td>
<td>Fall</td>
<td>5.00</td>
</tr>
<tr>
<td></td>
<td>2.00</td>
<td>1142</td>
<td>January 2014</td>
<td>1143</td>
<td>January</td>
<td>-14.00</td>
</tr>
<tr>
<td></td>
<td>3.00</td>
<td>1144</td>
<td>Spring 2014</td>
<td>1145</td>
<td>Spring</td>
<td>-14.00</td>
</tr>
<tr>
<td></td>
<td>4.00</td>
<td>1145</td>
<td>Summer 2014</td>
<td></td>
<td>Summer</td>
<td>6.00</td>
</tr>
</tbody>
</table>
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”.
<table>
<thead>
<tr>
<th>Retention Year Number</th>
<th>Term Type</th>
<th>Fall 2002</th>
<th>Fall 2003</th>
<th>Fall 2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.00</td>
<td>Fall</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Spring</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.00</td>
<td>Fall</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Spring</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.00</td>
<td>Fall</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Spring</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.00</td>
<td>Fall</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Spring</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.00</td>
<td>Fall</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Spring</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.00</td>
<td>Fall</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Spring</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.00</td>
<td>Fall</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Spring</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.00</td>
<td>Fall</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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
```
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.
**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:

<table>
<thead>
<tr>
<th>Actor</th>
<th>Action in School and Admin Folders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anyone</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 ”My Folders”</td>
</tr>
<tr>
<td>Designated analysts</td>
<td>Edit and Save</td>
</tr>
<tr>
<td>DSG</td>
<td>Delete and Rename</td>
</tr>
</tbody>
</table>

**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”
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](mailto:askDSG@nyu.edu)
- Phone: 212-998-2900
- Web: [www.nyu.edu/datawarehouse/dsg](http://www.nyu.edu/datawarehouse/dsg)