Enrollment Management Dashboards

Open Forum
April 8, 2011

Presented by
Office of the Registrar & ITS
Open Forum Overview

1. Summary of the EM Dashboards
2. EM Dashboards overview
3. A new era in data accessibility (and why we should all be ecstatic and worried at the same time)
4. New security and access protocols
5. Rollout plan
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7. Continuous improvement of the EM Dashboards
Summary of EM Dashboards

1. Academic Status
   i. Dean’s List
   ii. AP/DQ

2. Enrollment Planning
   i. Schedule Planning
   ii. Enrollment Monitoring
   iii. Course Planning

3. Grade Analysis
   i. Grade Monitoring
   ii. Grade Distribution
Summary of EM Dashboards (cont.)

4. Graduation Information
   i. Expected Graduates
   ii. Commencement
   iii. Degrees

5. Student Lists

6. Translate Values
**Academic Status – Dean’s List:** Generates lists of students on Dean’s List in a given college, dept, major, and several other criteria.
**Academic Status – AP/DQ:** Provides ability to get lists of students on the AP/DQ List for any historical term. Ability to filter students by their Career Program/Plan information or academic standing.
**Enrollment Planning – Schedule Planning:** Assists with future course schedule planning by showing past enrollment counts for courses and by helping to identify student populations who have taken the course or still need to take those courses.
Enrollment Planning – Enrollment Monitoring: The purpose of this dashboard page is to monitor daily enrollment totals for courses/sections in the current enrollment term, including number enrolled and waiting. Data is available from Summer Quarter 2008 forward.
Enrollment Planning – Course Planning: For a given course, it displays the students who, a.) have to take that course per their major/minor requirements, and b.) have already fulfilled all of its prerequisites.
Grade Analysis – Grade Monitoring: The purpose of this dashboard page is to monitor daily grading activities for sessions in the current enrollment term. Grade Roster status can be viewed by Session, Department, Instructor, and Work Flow. User can select among 6 status types.
Grade Analysis – Grade Distribution: Provides ability to get grade distribution information including counts and percentages for the previous or any historical term within a college or department for a course, class section, or instructor. Ability to filter on term, college/department, class, or instructor.
Graduation Information – Expected Graduates: Provides overall number and student lists for students who have applied to graduate in any given term.

| Expected Graduates Per Term | Degree/College Name | Fall Quarter 2019 | Spring Quarter 2019 | Quarter 2019 | Fall Quarter 2019 | Spring Quarter 2019 | Quarter 2019 | Fall Quarter 2019 | Spring Quarter 2019 | Quarter 2019 | Fall Quarter 2019 | Spring Quarter 2019 | Quarter 2019 | Fall Quarter 2019 | Spring Quarter 2019 | Quarter 2019 | Fall Quarter 2019 | Spring Quarter 2019 | Quarter 2019 | Fall Quarter 2019 | Spring Quarter 2019 |
|-----------------------------|---------------------|-------------------|---------------------|-------------|-------------------|---------------------|-------------|-------------------|---------------------|-------------|-------------------|---------------------|-------------|-------------------|---------------------|-------------|-------------------|---------------------|-------------|-------------------|---------------------|-------------|
| College of Agriculture, Food, and Environmental Sciences | 143 | 533 | 61 | 61 | 29 | 12 | 28 | 15 | 85 |
| College of Architecture and Environmental Design | 49 | 349 | 11 | 42 | 11 | 12 | 674 |
| College of Engineering | 157 | 527 | 127 | 104 | 33 | 19 | 607 |
| College of Liberal Arts | 127 | 651 | 44 | 124 | 28 | 28 | 1089 |
| College of Science and Mathematics | 157 | 540 | 35 | 79 | 23 | 9 | 607 |
| College of Engineering Education | 15 | 38 | 1 | 5 | 1 | 2 | 19 |
| College of Business | 105 | 640 | 16 | 88 | 21 | 15 | 67 |
| Total | 475 | 2986 | 938 | 647 | 128 | 82 | 4714 |

Please send questions or comments to pldata@poly.edu

CAL POLY CONFIDENTIAL: The data contained in this dashboard is the property of California Polytechnic State University (Cal Poly). Cal Poly does not want this data to be used outside the express consent of the information owner. The dashboard is for authorized use only based on a need to know. Use of the dashboard is governed by applicable laws and policies.
Graduation Information – Commencement: Provides overall number and student lists for students who are expected to participate in a given commencement. This data is refreshed twice a term with a list from the Office of the Registrar.
Graduation Information – Degrees: Provides overall number and student lists for students who are earned a particular degree from any given college, department, or major. Also displays honors information, if desired.
Translation Values: Displays all the associate values for each data element found in the EM dashboards.
**Student Lists:** Provides users with the ability to generate lists of currently active and on-leave students for university related activities such as communications and reporting and analysis. Lists may be filtered by active/on-leave status, by Career Program/Plan information, and by detailed student attributes including FERPA (directory information) setting, CPSLO/HE GPA and units, enrollment or eligibility to enroll, Empl Id, and email address.
A New Era in Data Accessibility

The Power of Dashboards

1. Tremendous amount of data on your fingertips
2. 24/7 accessibility to data
3. Graphical interface
4. Infrastructure to allow identification of problem areas fast
5. Best of both worlds: See the big picture and/or drill into details
6. Don’t have to be independent on anyone to get your work done
A New Era in Data Accessibility

Potential Pitfalls for End-Users

1. Failing to identify the actual need beforehand
2. Not being familiar with the data elements in the dashboards
3. Contacting students who have protected their directory information for inappropriate reasons
4. Compromising confidential data
5. Inappropriately sharing the data with others (but with good intentions...)

How to Avoid These Pitfalls

1. Thoroughly define what you are looking for first. Remember that defining the problem is half of its solution.

2. Know where to find what you are looking for. Familiarize yourself with all the data elements in the dashboard and what information they represent. Contact Registrar’s Office if you’re unsure.

3. Pay attention to the FERPA fields when you run student lists. Contact Registrar’s Office if you are going to send out emails and you’re not sure whether it’s appropriate. Familiarize yourself with ITS’ policy on mass emails.
A New Era in Data Accessibility

How to Avoid These Pitfalls

4. DUDE, don’t store that file!... That is, Download, Use, Destroy, Exhale. Remember that data is dynamic and can change daily. Don’t store anything! Use the “Save Current Selection” feature in the dashboards under “Page Options” to save your queries to run them again in the future instead of saving query results.

5. Your access is for your use only. Do not share your query results with anyone else, especially the student list queries.
New Security and Access Protocol

Security

• Brand new security roles for dashboard access.
• Each “dashboard” will have a separate role.
• New application is required for access to EM dashboards.
• Users will have to justify their access to the EM dashboards.
• Required online FERPA training prior to be granted access.
New Security and Access Protocol

How to Gain Access to EM Dashboards

1. Go through the online FERPA training and complete the quiz. The training is currently located at http://www.polydata.calpoly.edu/dashboards/dash_pages/enrollment_mgmt/index.html

2. Determine which Enrollment Management Dashboards you would like to request access to. Refer to the following link for a brief tutorial for each dashboard http://www.polydata.calpoly.edu/dashboards/dash_pages/enrollment_mgmt/index.html

3. Fill the Comp Account Form located at http://www.calpoly.edu/~servicedesk/forms/web_forms/comp_account.html

4. Under PS Student Administration Special Instructions,
   i. Enter the date you have completed the FERPA training/quiz
   ii. Specify which dashboards you would like access to and provide the appropriate justification for access.
Rollout Plan

- **April 11, 2011** – New online FERPA training/quiz available through Polydata website at

- **April 13, 2011** – New EM Dashboards release. All current users will have to submit new comp account forms (see the previous slide)

- **Late April 2011** – Online FERPA training/quiz moves to LearnerWeb under Single Click Access in the Portal (if LearnerWeb not readily visible, click on the “hidden links” in the bottom of the Single Click Access channel)
Rollout Plan (cont.)

• **Late April 2011** – New Comp Account Form release by ITS. The new form will have the new EM dashboards as well as new fields to indicate completion of the FERPA training.

• **Mid to Late May 2011** – BRIO is phasing out.
Where to Find...

• **Enrollment Management Dashboards**
  1. Login to the Portal
  2. Click on “PolyData Dashboards” under “Single Click Access to...”

• **Information about EM Dashboards**
  – Click on “About This Page” under “Important Information” box on the top right corner of any EM dashboard.
Where to Find...

- **Online FERPA training/quiz**
  - Before May 2011:  
  - After May 2011:
    1. Login to the Portal
    2. Click on LearnerWeb under “Single Click Access to...” (if LearnerWeb link is not readily visible, click on “Hidden Links” in the bottom of the channel)

- **Comp Account Form**
  - [http://www.calpoly.edu/~servicedesk/forms/web_forms/comp_account.html](http://www.calpoly.edu/~servicedesk/forms/web_forms/comp_account.html)
Continuous Improvement of our Dashboards

- Visit “About This Page” for
  - Page Descriptions
  - Enhancements
  - Issues
  - What’s New

- Send your questions to
  - Patty Warnick-Wait, pwarnick@calpoly.edu

- Email any feedback to polydata-sa-support@calpoly.edu
  - Reporting issues
  - Ideas for enhancement
  - Usability issues/suggestions
  - Overall comments