



# WELCOME TO THE SUMMIT

OFFICE OF THE REGISTRAR  
SUMMIT



CAL POLY

11:00-12:00 FOUNDERS ROOM

# Data is Our Friend

Using Dashboards for Student and Course Data

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**Presented by: Carolyn Polvi, Assistant Registrar**



**CAL POLY**

# During Sessions, please...

- ✓ Silence Cellphones
- ✓ Save Questions to the end of the Session
- ✓ Avoid Side Conversations
- ✓ Complete Our Survey

...Thank You!



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# *Content to Cover in This Session:*

- What information can be gathered?
- Where does the data come from?
- Who can help me if I have questions?



# Security Required!

- Job Dependent
- Request through your Portal:



Cal Poly Learning Hub



# Enrollment Management Suite

- Academic Status
- Change of Major
- Course Demand
- Enrollment and Schedule Planning
- Grade Analysis
- Graduation Information
- Student Lists

# Dashboard Shortcuts and Tips

Welcome page

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Hamburger

---

Clear My  
Selections  
Select a View,  
Show Minors

---

Export – Data –  
CSV

Account Settings

---

Important Info/  
About this Page

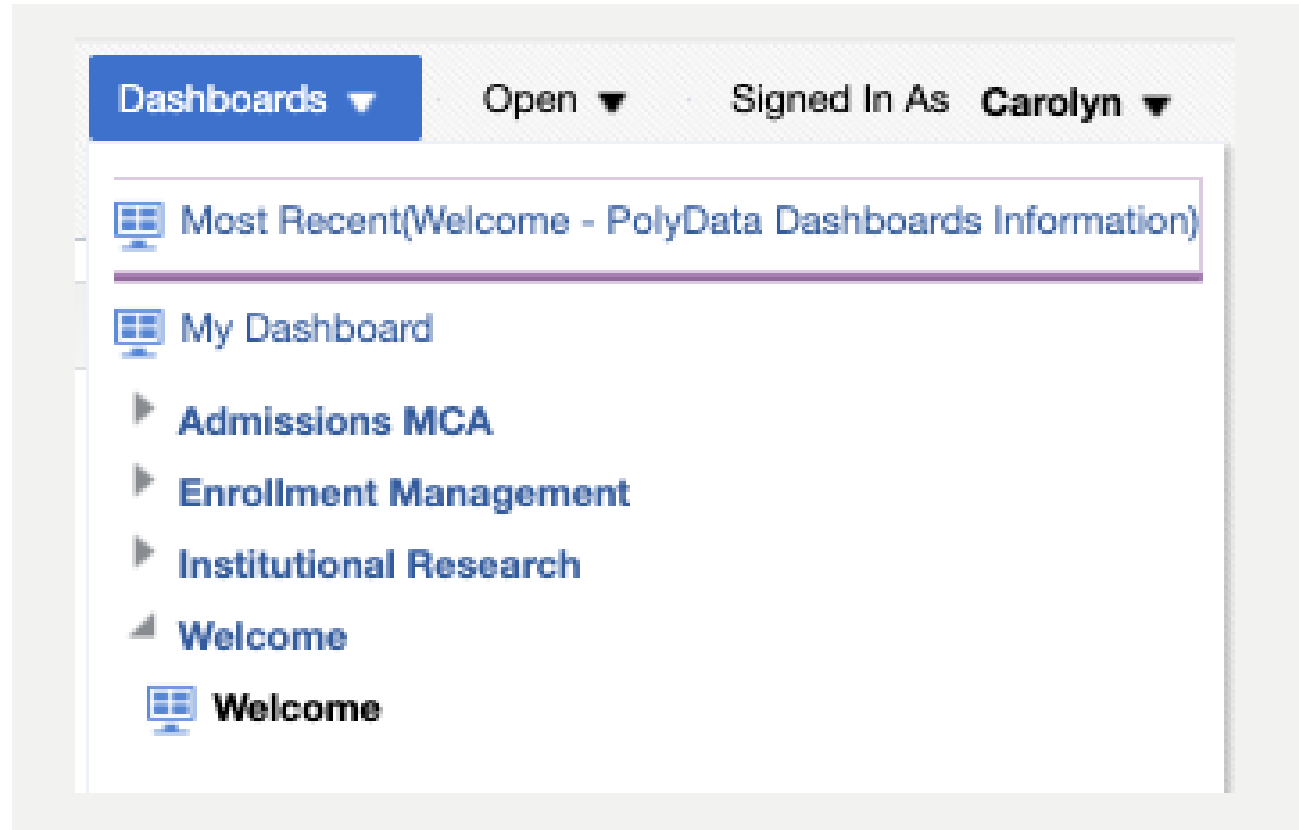
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Prompts &  
Filters  
Sorting and  
Drilling  
“The Pencil”  
(More/Search)



# Welcome Page

- Known Issues
- Info and Help
- Contacts





# Account Settings

- Preferences
- Defaults

The screenshot displays the 'My Account' settings page. At the top, there is a navigation bar with links for 'Advanced', 'Help', and 'Sign Out'. Below this, a dropdown menu is open, showing 'Signed In As Carolyn' and a link to 'My Account'. The main content area is titled 'My Account' and includes a question mark icon. It lists the user's ID as 'cpolvi@calpoly.edu' and their display name as 'Carolyn'. Below this, there are several tabs: 'Preferences' (which is selected), 'BI Publisher Preferences', 'Mobile Preferences', 'Delivery Options', and 'Application Roles'. The 'Preferences' tab contains two settings: 'Starting Page' set to 'Enrollment Management : Student Lists' and 'Locale (location)' set to 'Default - English - United States'.

Advanced Help Sign Out

Open Signed In As Carolyn My Account

**My Account** ?

User ID: cpolvi@calpoly.edu  
Display Name: Carolyn

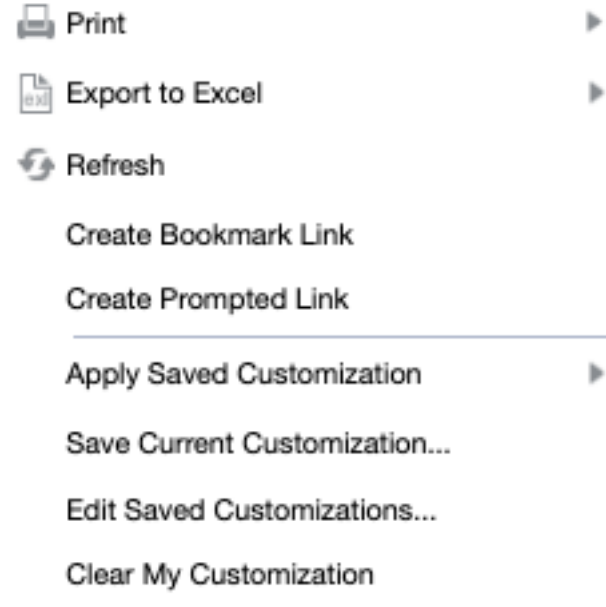
**Preferences** BI Publisher Preferences Mobile Preferences Delivery Options Application Roles

Starting Page Enrollment Management : Student Lists

Locale (location) Default - English - United States

# Hamburger / Gear

Page Options  
(Below name)



# Important Information About this Page

-Last Refresh  
-Term  
-Enrollment Term

## Important Information

Today is Tuesday, October 01, 2019.

The data available on this PolyData Dashboard page was last refreshed from PolyData on **Tuesday, October 01, 2019 4:41:16 AM.**

Term: **Fall Quarter 2019** (ends 01/05/20).  
Enrollment term: **Fall Quarter 2019.**

[About this Page](#)

# Reset or Clear My Selections?

- Reset: section specific

- Clear My Selections: entire page

## Important Information

Today is Tuesday, October 01, 2019.

The data available on this PolyData Dashboard page was last refreshed from PolyData on **Tuesday, October 01, 2019 4:41:16 AM.**

Term: **Fall Quarter 2019** (ends 01/05/20).  
Enrollment term: **Fall Quarter 2019.**

[About this Page](#)

[Clear My Selections](#)

# Prompts & Filters

Student Groups, Email,  
Empl ID, Enrolled, Athlete,  
Course, Course Attribute,  
Active, On Leave, FERPA,  
GPA, Units Earned,  
Instructor, Time of Day,  
Expected Graduation,  
Plan, Subplan, and MORE



Dashboard specific



Academic related



Enrollment/course related



Student related



# Select a View, Minors?

How Minors?

YES ▼ **Apply** **Reset** ▼

Select a View: Summary ▼

Summary

- Student Listing
- Student Listing with Plan
- Student Listing by CPSLO GPA
- Mailing Addresses
- Email Addresses
- Download View
- Filters View

# of Students	
7	




# Sorting Data


- Default sort - by dashboard purpose
- Custom sort - column heading arrows


Class Listing				
Select a View: Summary ▼				
Fall Que	.....			
Subject	Catalog Nbr ▲▼	Course Catalog Description	Section	Comp
FSN	101	Orientation to the Food Science and Nutrition Majors	01	LEC
			02	LEC
	121	Fundamentals of Food	01	LEC
			02	LAB
			03	LAB

# Drilling Down

- Blue hyperlink
- College, Dept, Plan
- Class Level, Admit Term, Expected Grad Term

SECTION				
Sections Offered	Seat Demand	Enrollment Capacity	Unmet Seat Demand	% Unmet Seat Demand
2	86	70	16	19% 
2	38			0% 
3	45			0% 

 Student Listing

 Student Summary




# Export – Data – CSV

- Bottom of page
- Choice of Format
- Prefer CSV

[Return](#) - [Refresh](#) - [Print](#) - [Export](#) - [Create Bookmark Link](#)


 PDF

 Excel 2007+

 Powerpoint 2007+

 Web Archive (.mht)

 Data

 CSV Format

 Tab delimited Format

 XML Format

# “The Pencil” (More/Search)

Extracting  
from one,  
applying to  
another

The screenshot shows a mobile application interface. At the top, there is a label 'Emplid' above a dropdown menu. The dropdown menu is open, showing a list of values: 'NULL', '000', '000', '000', and '000'. A yellow rectangular box highlights the list area. Below the list, there is a button labeled 'More/Search...'. The dropdown menu has a purple arrow icon on the right side.

## Select Values



### Available



Name **Starts** ▼

**Search**

☐ Match Case

NULL

000

000

000

000

000

000

Choices Returned: 1 - 256 +

**More...**

### Selected



**OK**

**Cancel**



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# Customized Search

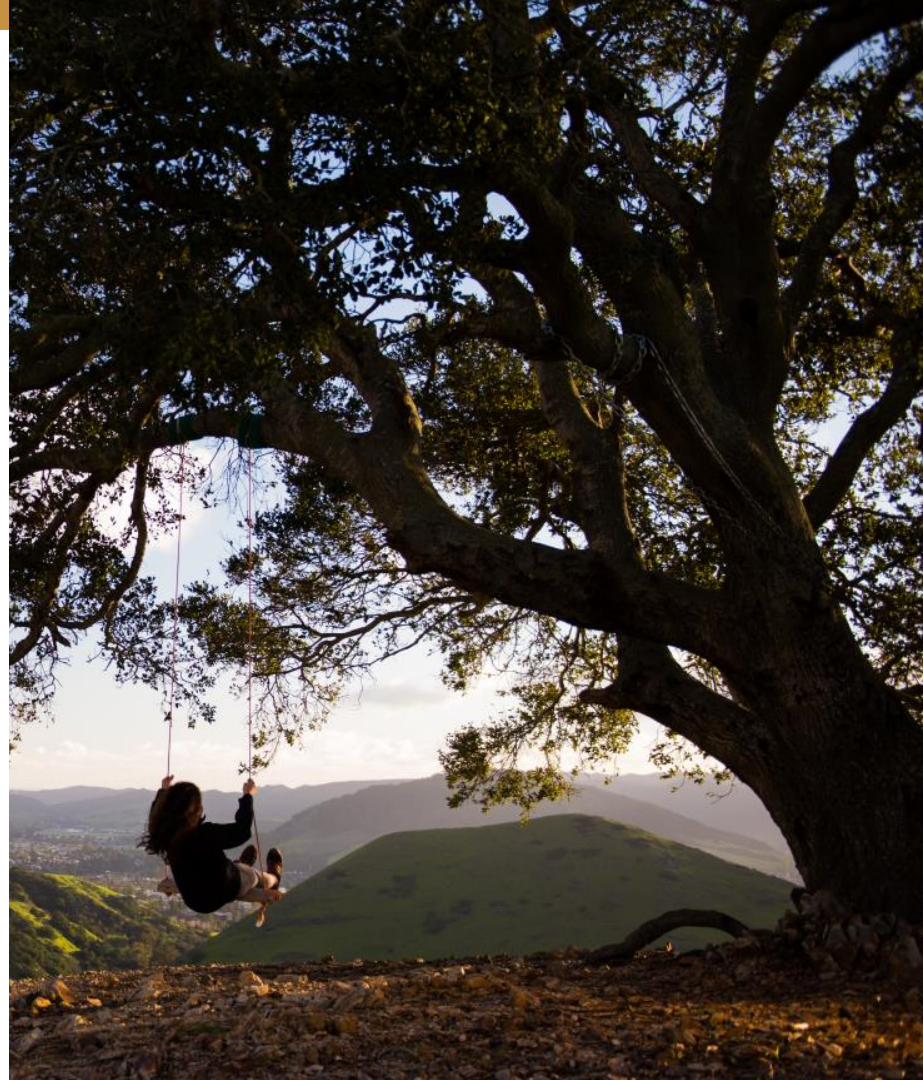


- ✓ Useful if only one data point
- ✓ Copy and paste data
- ✓ Click OK, then OK, then Apply
- ✓ Target what you need

# Questions for the Group?

## Enrollment Management

- Primary Contact: [Carolyn Polvi](#), 756-5901
- Questions: [polydata-sa-support@calpoly.edu](mailto:polydata-sa-support@calpoly.edu)



# Session Survey!

Subtitle / Presenter



CAL POLY