Enrollment Monitoring BI Publisher Report User Guide

Contents

How to Access the Report: ................................................................. 2
Using the Report: ........................................................................... 4
Helpful Information: ..................................................................... 7
How to Access the Report:

1. From the portal, select the link to PolyData Dashboards

   My Apps
   - Cal Poly Canvas
   - Student Center
   - Email & Calendar
   - Cal Poly OneDrive
   - HR Administration
   - Student Administration
   - CSU Portal - Financial Administration
   - PolyData Dashboards

2. On the ORACLE Home page, select Catalog hyperlink.

   Navigate to Shared Folders
3. Select Publisher Records, sub area Registrar. Click Enrollment Monitoring Folder.

4. Open Enrollment Monitoring Report
5. Enrollment Monitoring Report Home Page will Appear:

Using the Report:

1. Select the Term Code you wish to pull information from.

*Please note, the BI Publisher Report will show the upcoming term, current term and previous terms information only.

2. Begin selecting required filters for the information you are searching for, using the filters provided:

- College
- Department
- Subject
- Session Code
- Class Status
- Catalog Number
- Instructor
- Requirement

In the Example provided below the user wishes to view AEPS courses available in the Fall 2020 (2208) quarter.

*If you were to select the College of Ag, Food and Environmental Sciences, you will notice that all remaining filters available do not funnel out unnecessary information.
3. Select only the filters required and click the Apply Button

*Reminder*- In this Example the user wishes to view AEPS courses available in the Fall 2020 (2208) quarter:

4. Requested information will appear in the Class Enrollment Monitoring Tab:
5. Select the Download tab to export the information to Excel.

6. Click on the Excel Icon that appears on the right hand corner of the report:

7. To pull additional reports, select the filters you require and hit the Refresh symbol; found on the bottom right hand corner of the page.
Helpful Information:

1. The Enrollment Monitoring Report does not take into account any filters applied when selecting specific information. The report shows all available information, regardless of filters selected, however, the report only pulls filtered information selected.

2. The report only shows course information for classes that have been set to print. No print classes with enrollment will not reflect in the Enrollment Monitoring BI Report.

3. Information pulled prior to the Summer 2020 (2206) quarter will not reflect GE 2020 requirements.

4. Combined sections waitlists appear incorrectly in terms where enrollment has closed. We are hoping to have this error rectified shortly.

5. Available seats may appear incorrect for combined sections. Seats may show as available on one side of a combined section enrollment, whereas the total combined section for the combined course is full.

6. The Instructor filter only shows results through Allen, Robert David. You will need to select the Search F12 button to search for an instructor whose last name starts past Allen.

A text box will appear where you can type in additional search criteria: