

# A Guide to Retrieving Recruitment Information and Reports from MPathways

## MPathways Queries for Prospects

**SA02 RecAdms Prospect Counts by Referral Source  
and Admit Term within Academic Program.rep**

**SA02 RecAdms Prospects by Referral Source  
and Admit Term within Academic Program.rep**

**SA02 RecAdms Prospect Counts by  
Referral Source within Academic Interest.rep**

**SA02 RecAdms Prospects by Referral Source  
within Academic Interest.rep**

**To use these queries you must have access to Business Objects in  
MPathways.**

These queries and instructions have been provided jointly by the Rackham Graduate School and MPathways to assist Departments and Programs pulling prospect information for their units. These queries reside in the MPathways Repository. The instructions are written with the assumption that they will be retrieved and saved onto your local drive (c:/temp). You may wish to modify the queries to best fit your business practice such as selecting certain terms only or pulling by Referral Source Date. Any questions should be directed to the MPathways Helpline: 67000.

## **Prospect Counts by Referral Source and Admit Term within Academic Program Report**

This query will give you the counts of prospects for your Academic Program(s). You will enter the date you wish to pull information from and your program(s) of interest. The query will pull the number of all students entered as prospects since that date and indicate their referral source and admit term of interest.  
(See Appendix A for sample report)

Open Business Objects.

Click on “File”, then “Open”, then “SA02 RecAdms Prospect Counts within Academic Program.rep”

The screenshot shows the BusinessObjects application window titled "BusinessObjects - [B]". The menu bar includes File, Edit, View, Insert, Format, Tools, Data, Window, and Help. The toolbar contains various icons for file operations and data manipulation. The main report area displays the title "The University of Michigan Prospect Counts by Referral Source and Admit Term within Academic Program" and a filter section for "Acad Prog Deser". Below the filter, there is a table with a header row "Totals" and a data row. The status bar at the bottom shows "Page 1", "1/1", "Last Exec: 10/9/00 02:14 PM", and "NUM".

The University of Michigan Prospect Counts by Referral Source and Admit Term within Academic Program Prospect Source >=:	
Section: Acad Prog Deser	
Academic Program:	
	Totals

When the report appears: Click on the “Refresh” icon.

The image shows a Windows-style dialog box titled "Enter or Select Values". It has a blue title bar with a close button (X) in the top right corner. The dialog box contains three text input fields, each preceded by a label: "Please enter the Academic Career:", "Please enter the Academic Program value(s) desired:", and "Please enter the Prospect Source Date as mm/dd/yy:". To the right of these fields is a vertical stack of four buttons: "OK", "Cancel", "Help", and "Values...".

**Academic Career:** Enter your Academic Career (i.e.: GRAC for Rackham).

**Program:** Enter all Academic Programs codes that you are interested in receiving. If you do not know your code select the Values tab and select by the proper Academic Program description. (Note: the code must be exactly as those in the values table separated by a semi colon. Therefore, it maybe easier to select from the Values. Highlight a description and press Control + clicking on another description will allow multiple choices.)

**Date:** enter the date in which you want to pull all prospects (i.e.: If the last time you ran this report was 09/10/00 you would choose 09/10/00 to receive everyone since your last query).

Click "OK".

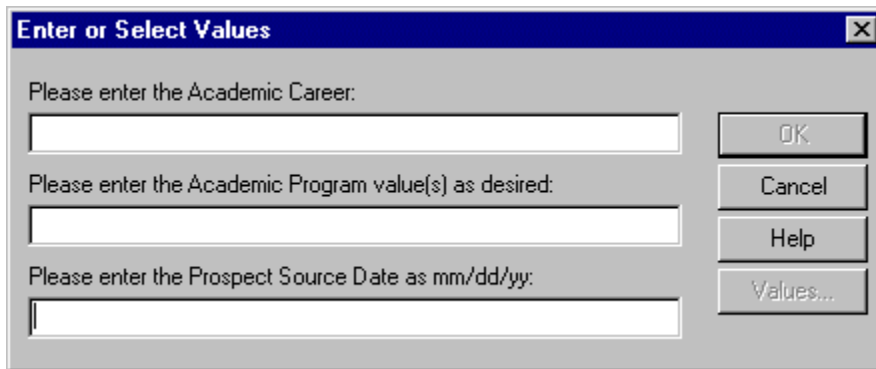
The report will return any prospects for the programs you specified who were entered in MPathways since the "Prospect Source" date. It will indicate your chosen program(s) by admit term and by referral source. You may choose to view this report on screen or print it by selecting Print from the File menu.

The "SA02 RecAdms Prospects by Referral Source and Admit Term with Academic Program.rep" report (see page 5) will provide more details about prospects including student's name, address and other pertinent information.

## **Prospect by Referral Source and Admit Term within Academic Program.rep**

In Business Objects click on “File”, then “Open” and choose the “SA02 RecAdms Prospect by Academic Program.rep” query.  
(See Appendix B for sample report)

When the report appears Click on the “Refresh” icon (see page 2 for example).



In the “Enter or Select Values” dialogue box enter your Academic Career, Academic Program(s) and date.

**Academic Career:** Enter your Academic Career (ie: GRAC = Rackham).

**Program:** Enter all Academic Program codes that you are interested in receiving. If you do not know your code, select the Values tab and select the proper Academic Program code. (Note: the code must be exactly as those in the values table separated by a semi colon. Therefore, it maybe easier to select from the Values. Highlight a description and press Control + clicking on another code will allow multiple choices.)

**Date:** enter the date in which you want to pull all prospects (i.e.: If the last time you ran this report was 09/10/00 you would choose 09/10/00 to receive everyone since your last query).

Click “OK”

Your report will appear indicating the Referral Source, Admit Term, Student ID, Student Name, Gender, Birth date, Phone, Ethnicity, GPA, Current Address, and communication information entered through web inquires in student alpha order.

You may simply print this report for your information. You can now determine which communications procedure you wish to use with MPathways. Or you may choose to export it into an Excel spreadsheet for your use.

**Should you wish to export the information you will need to:**

Click on the “View Data” icon.

**The University of Michigan**  
**Prospects by Referral Source and Admit Term within Academic Program**  
**Prospects source >=: 10/15/00**

Header

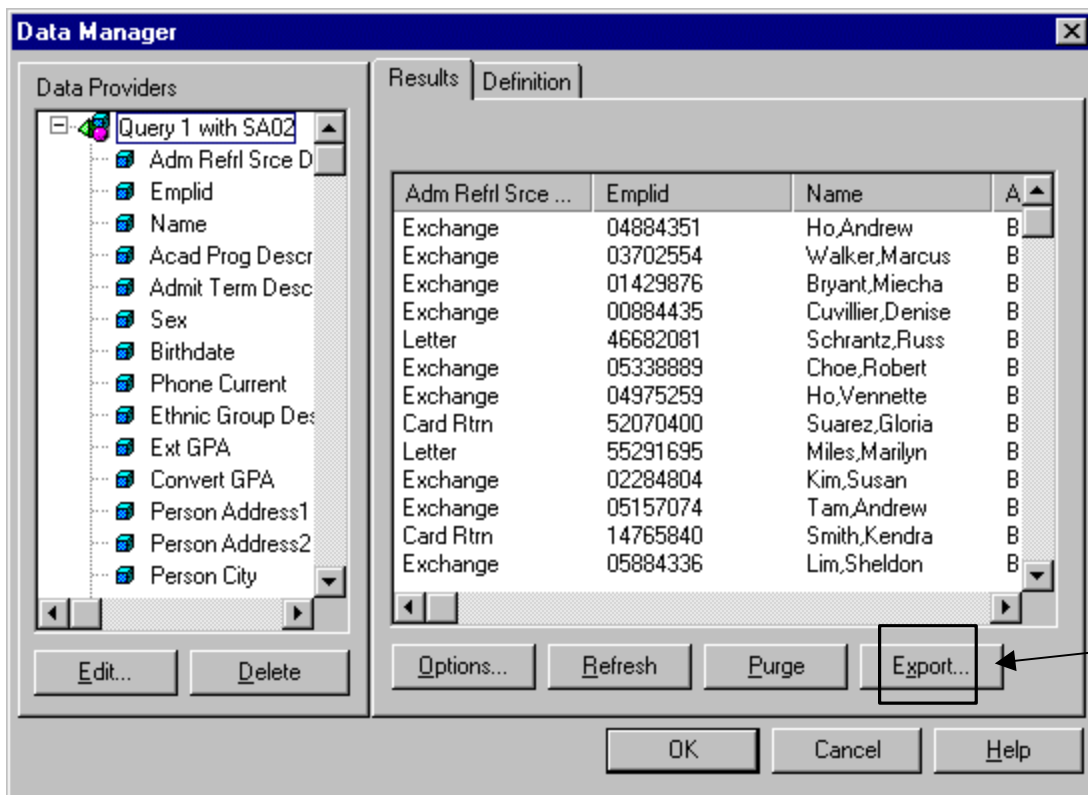
Academic Program: Neuroscience Doc

Referral Source	Admit Term	Student ID	Student Name	Gender	Birthdate	Ethnicity	GPA	Current Address
CollFair	FA 2001	[Redacted]	Ch[Redacted]	F	[Redacted]	White		129 Mark Santa Cr
CollFair	FA 2002	[Redacted]	Cord[Redacted]	F	[Redacted]	Hispanic		11513 Na Albuquerque
Web Site	FA 2001	[Redacted]	He[Redacted]	M	[Redacted]	White	3.00	3100 St.

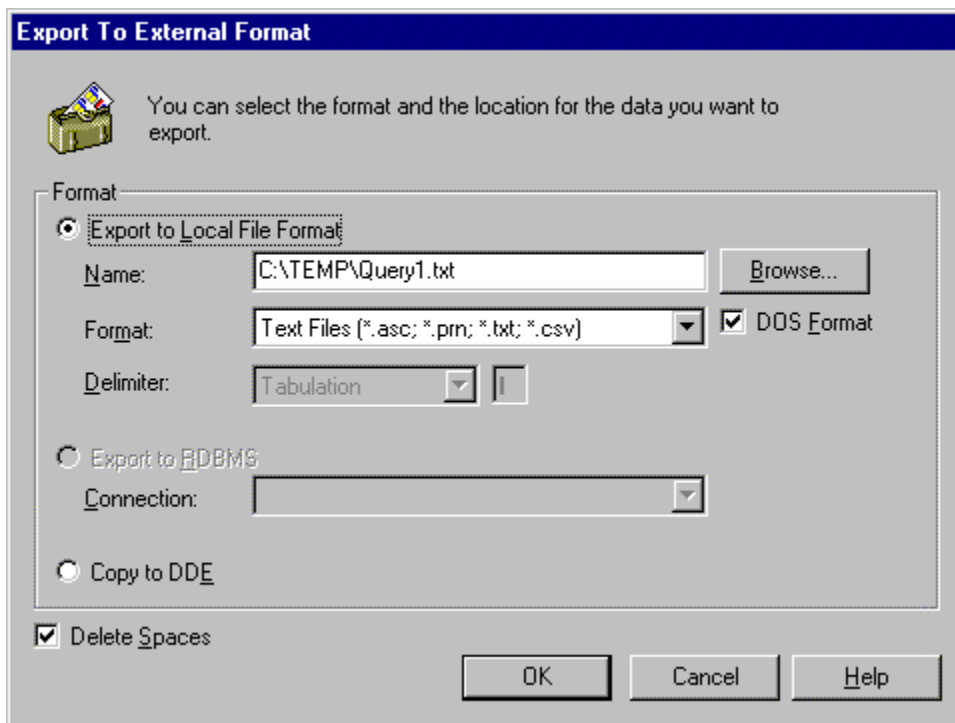
Report1

Page 1 1/3 Last Exec: 11/9/00 02:53 PM NUM

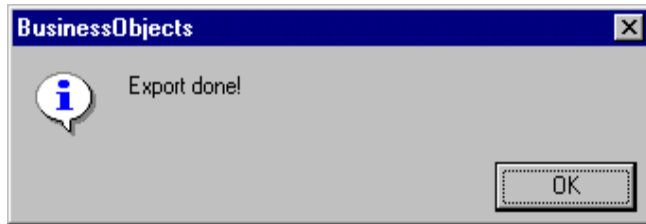
The Data Manager screen will appear.



At this screen click on “Export”



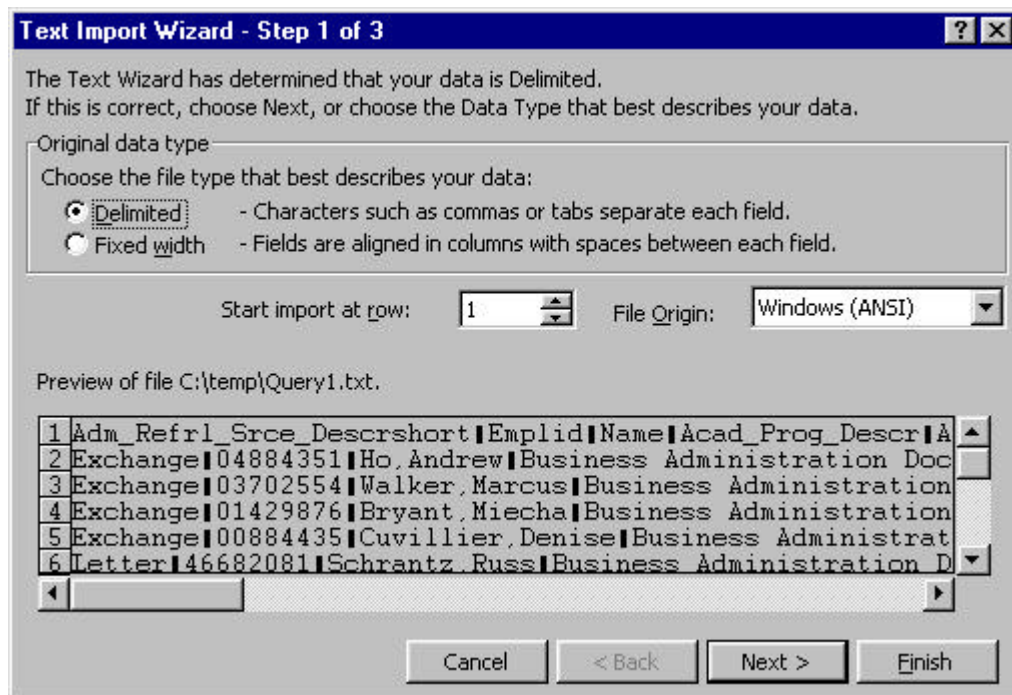
Business Objects will automatically choose C:\Temp\Query1.txt. Click on “OK”.



Click “OK”.

## **WORKING WITH YOUR DATA IN EXCEL**

Open Excel on your computer and open the Query1.txt file on your Temp directory c:\temp\Query1.txt”. The Temp Import Wizard will appear automatically.



Choose “Delimited”, then click on the “next>” tab.

**Text Import Wizard - Step 2 of 3**

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

**Delimiters**

☒ Tab    ☐ Semicolon    ☐ Comma  
☐ Space    ☐ Other:

☐ Treat consecutive delimiters as one

Text Qualifier:

**Data preview**

Adm_Refrl_Srce_Descrshort	Emplid	Name	Acad
Exchange	04884351	Ho, Andrew	Busin
Exchange	03702554	Walker, Marcus	Busin
Exchange	01429876	Bryant, Miecha	Busin
Exchange	00884435	Cuvillier, Denise	Busin
Letter	46682081	Schrantz, Russ	Busin

Buttons: Cancel, < Back, **Next >**, Finish

Choose “Tab”, click on “Next>” tab.

**Text Import Wizard - Step 3 of 3**

This screen lets you select each column and set the Data Format.

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

**Column data format**

☒ General  
☐ Text  
☐ Date:   
☐ Do not import column (Skip)

**Data preview**

General	General	General	General
Adm_Refrl_Srce_Descrshort	Emplid	Name	Acad
Exchange	04884351	Ho, Andrew	Busin
Exchange	03702554	Walker, Marcus	Busin
Exchange	01429876	Bryant, Miecha	Busin
Exchange	00884435	Cuvillier, Denise	Busin
Letter	46682081	Schrantz, Russ	Busin

Buttons: Cancel, < Back, Next >, **Finish**

Click on the “Finish” tab.



Highlight your entire document (from columns A-S) and click on “Format”, then “Column”, then “AutoFit Selection”. This will format all of your columns to the fit the information provided with nothing hidden.

Highlight the B column (Emplid), choose Format, Cells, Custom. In the “type” area insert eight zeros (00000000). Click “OK”, this will add on any missing leading zeros in the Emplid. Do the same for Column R which is the Zip Code (Person\_Postal) column using five zeros.

To separate the Name column into Last and First for merging do the following: Highlight Column D and Insert a column to the left of Column D. Highlight Column C and choose “Data” then “text to columns”. The “Convert Text to Columns Wizard” dialog box appears.

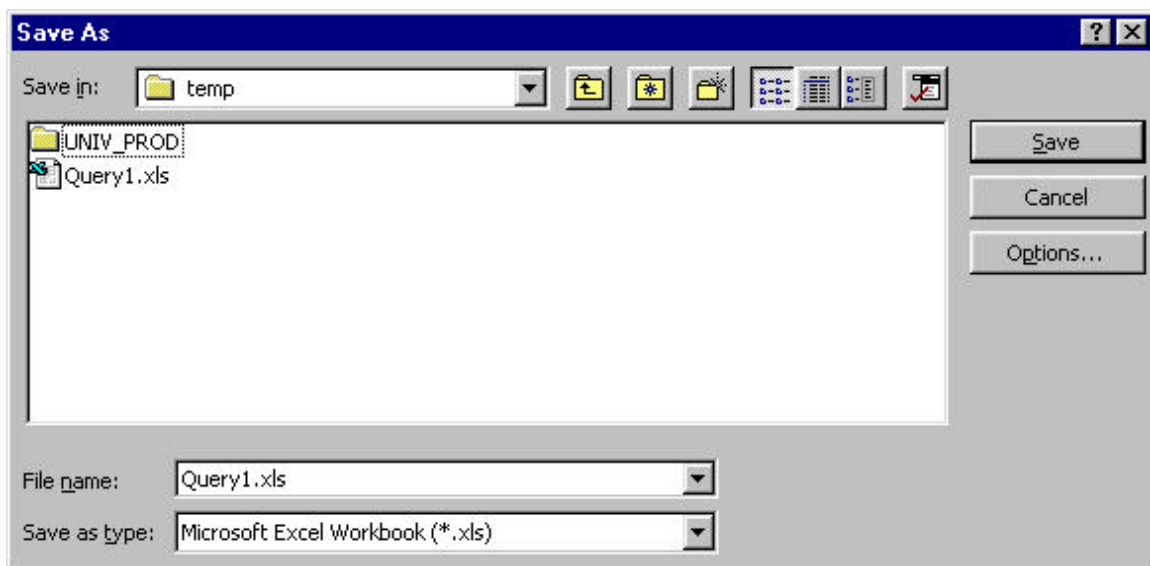
Choose “Delimited”, then the “Next>” tab.

Choose “Comma” then the “Finish” tab.

This should separate the name so that the last name is in column C and first name in column D. Type “LNAME” as the column header for column C and “FNAME” as the column header for Column D.

Delete any records that you do NOT wish to use in your data by highlighting the row number and choosing Edit/Delete. Modify any data as desired, note addresses (i.e.: abbreviations).

Save as an Excel worksheet as c:\temp\query1.xls (or rename as appropriate for your business needs).



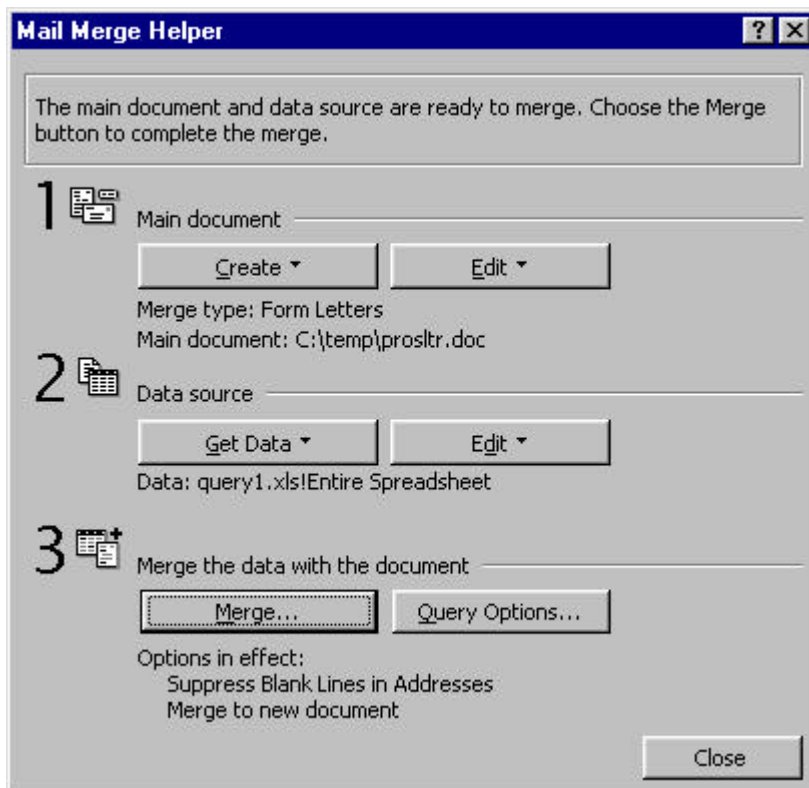
You are now able to use the list for merging into Word documents for mailing. (Please note: occasionally, it has been noted that a few address are not being picked up and transferred to the DataWarehouse. Should you notice a blank address, please check with the regular data screens in MPathways (or someone who has access to student information in your unit) to get the address.

Many students are entered with only an Academic Interest instead of a program as in all test tape loads (i.e.: GRE). To view prospective students you may wish to run the Prospect Count within Academic Interest Report (SA02 RecAdms Prospect Counts By Referral Source and Admit Term within Academic Interest.rep) {see page 12}.

### **To Merge your documents in Word:**

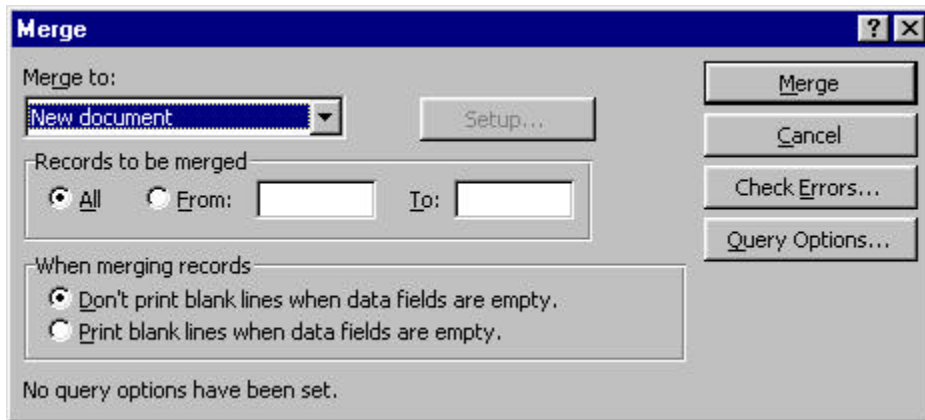
Close the Worksheet in Excel and open Word. Open your letter (sample letter provided at: <http://www.rackham.umich.edu/Recuitment/instr.html> (OR: c:\temp\Prosltr.doc; or request an email attachment of the letter from flwships@umich.edu). Please modify this form letter as desired and restore. Make sure your merge fieldnames match the headings on the Excel spreadsheet. (See sample letter, Appendix E)

Select “Tools”, then “Mail merge”, then “Merge”. (Should you wish to alphabetize or resort the letters select “Query Options” tab.)



Then “New Document”:

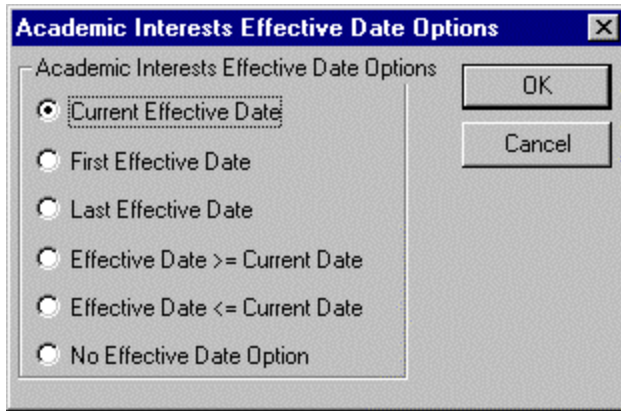
Click on “Merge”.



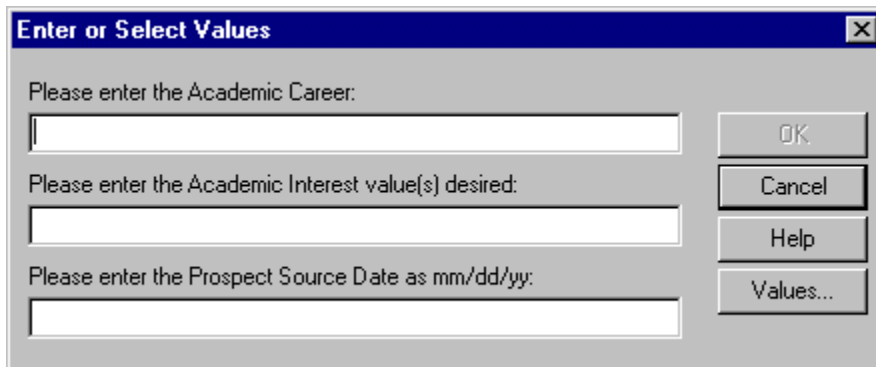
The letters will appear in another Word document and are ready for printing. You may also choose to print and create labels for distribution.

## **Prospect Counts by Referral Source within Academic Interest Report**

In Business Objects click on “File”, then “Open”, then the SA02 RecAdms Prospect Counts within Academic Interest.rep query. Click on the “Refresh” icon (see page 2). (See Appendix C for sample report)



Choose “Current Effective Date” on the pop up screen.



Enter your Academic Career (ie: GRAC = Rackham).

Enter the Academic Interest code value you wish to list (please note: departments will have numerous choices for their area; i.e.: American Culture, American Studies, American History, American Language). Press the “Values” button to select from a list.

Enter the date from which you want to pull prospects. (i.e., = or > 09/01/00).

Click on “OK”.

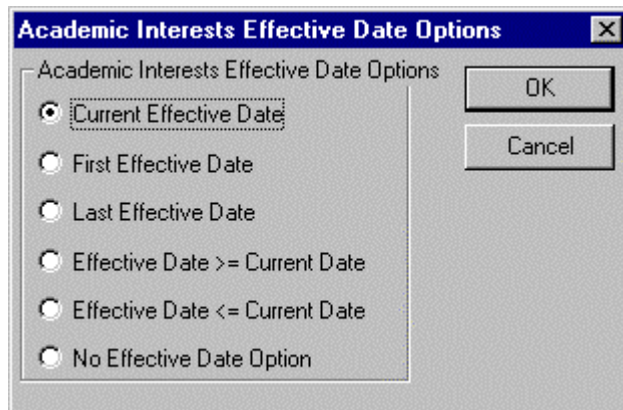
The report will return any prospects for the Academic Interests you specified who were entered in MPathways since the “Prospect Creation Begin” date. It will indicate your chosen areas of interest by admit term and by referral source. You may choose to view this report on screen or print it by selecting Print from the File menu. (NOTE: Admit terms will be blank for prospects entered via a tape load {i.e., GRE test scores}).

The “SA02 RecAdms Prospects by Referral Source within Academic Interest.rep” report (see page 14) will provide more details about prospects including student’s name, address and other pertinent information.

## **Prospects by Referral Source within Academic Interest Report**

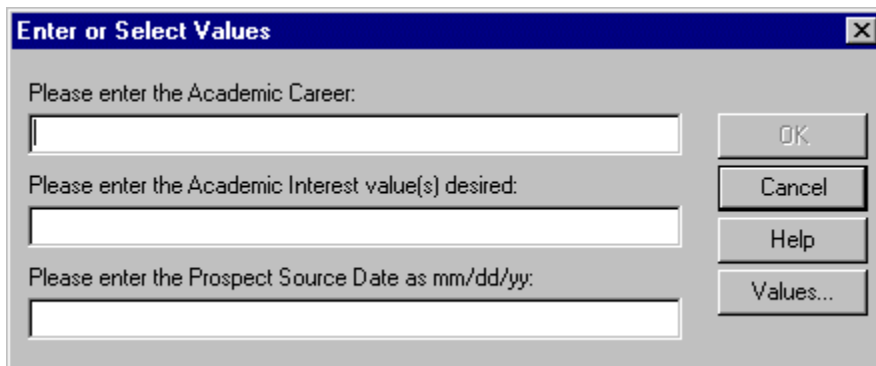
The “SA02 RecAdms Prospect by Academic Interest.rep” query will give you the detailed information of your count query. It will include the Referral Source, Admit Term, Student ID, Student Name, Gender, Birthdate, Phone, Ethnicity, GPA, Current Address in student name alpha order. (See Appendix D for sample report.)

Open Business Objects and Click on “File”, then “Open”, then “SA02 RecAdms Prospect by Academic Interest.rep”. Open the query and click on the “Refresh” icon (see page 2).



Choose “Current Effective Date”.

Click “OK”.



**Academic Career:** Enter your Academic Career.

**Academic Interest:** Enter the Academic Interest you wish to check (please note: departments will have numerous choices for their area; i.e., American Culture, American Studies, American History, American Language). Press the “Values” button to select from a list. (Note: the code must be exactly as those in the values table separated by a semi colon. Therefore, it maybe easier to select from the Values. Highlight a description and press Control + clicking on another description will allow multiple choices.)

**Date:** Enter the date from which you want to pull prospects. (i.e., = or > 09/01/00).

Click “OK”

Your report will appear indicating the Referral Source, Admit Term, Student ID, Student Name, Gender, Birth date, Phone, Ethnicity, GPA, Current Address, in student alpha order. Your report will appear for your review, printing and use. Should you wish to export this report into Excel please see instructions beginning on page 5.

(NOTE: If an Admit Term appears on the report it is possible that the student also has an Academic Program record. You might want to check these to make sure that duplicate letters are not sent.)

You may simply print this report for your information. You can now determine which communications procedure you wish to use with MPathways. Or you may choose to export it into an Excel spreadsheet for your use.

**Should you wish to export the information you will need to:** See complete set of instructions beginning on Page 5.

Please contact the MPathways Helpline at 67000 if you have any questions or concerns.