

Application Gateway Campus Advisor Training
Session 3, Reports and Queries
Video Notes

What is the difference between a query and a report?

QUERIES answer the question, "Who meets the following criteria?" and generate a list of applicants who satisfy the parameters you have entered for the query.

A REPORT gives you specific information about all the records generated by the query.

Example:

- You could run a QUERY that would yield the names of all female students going to Senegal for spring term 2010.
- You could generate a REPORT that would include the birthdates, credits, and passport status of all the students listed in that QUERY.

Queries and Reports do not save the RESULTS of the search, just the parameters, so as new applications come in that meet the criteria, they will be added to the Query/Report. (See below for suggestions on exporting and saving data in order to maintain a snapshot of a point in time).

Generating a query or report

On the right hand menu, go to Advanced Search. This opens the "New Query Wizard"

You have a number of options available to you:

- Application parameters - term, program, internship name
- Applicant parameters - information about the applicant that does not change (name, gender, Birthdate, etc.)
 - NOTE: each APPLICANT may have multiple APPLICATIONS (if they are apply for scholarships, multiple internships, etc.) so the system distinguishes between the two.
 - Complete/Incomplete Submissions
- Questionnaires - can search by the specific questions/answers within the questionnaires (ie. the general info (regular application form), academic supervision, references, IE3's health disclosure form, etc.).

Application Parameters you can search by (you can check all that apply)

- Application Cycles (ie. Summer 2010, Spring 2010)
- Application Phase (pre-decision, post-decision, etc.)
- Application Status
 - Advising
 - Pre-approval
 - Approved - student will receive participation agreement
 - Committed - Pending Final Acceptance (after participation agreement is signed)
 - Final Acceptance
 - Scholarship awarded
 - Waitlist
 - Denied
- Application Activity
- Programs (individual internship sites)
- Program Groups (can look at groups of students)
- Location
- Home Institution (you won't need this since your login is limited to students from your school)

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- Gender - there are two versions, one noted that we are not using and one that is noted that we are using.
- Orientation date
- Orientation preference
- Passport Country
- Passport expiration

EXAMPLE: to search by Summer 2010 you can click that box, then save the query.

To search for all students on your campus, you can just set up a query for all applicants (remember, you are automatically restricted to students at your campus).

Once you save these queries, you will see them as options everytime you log on and you can quickly access the most up to date information about applicants at your campus.

REPORTS

On Options Button, select "Create Report"

You get a lengthy menu of information that can be displayed.

Step 1 - Choose primary and secondary output grouping (how do you want to group them, ie. first by term, then by name (alphabetical). Limited to two parameters.

Step 2 - What do you want to know about the students?

Email, DOB, gender, addresses, etc. Also can access answers from specific questions on any of the application materials, for example, what is second choice internship, how did you learn about the internship program?

NOTE: Answers to specific questions are accessed by clicking on the name of the questionnaire, which yields a list of questions from that questionnaire.

The Report Generated is a matrix. You can print it or export it as excel document. If you want to save a snapshot in time, then export it to excel and save it, because the report itself does not save the specific answers.

Once you generate a report (WHAT information you want) you can combine it with any query (who). There are drop down menus asking you to "Select a Query" and "Select a Report" and the results will always be the list of the queried students and the data you want to know in the report.

You can make as many reports as you want (as suit your campus), delete them as needed, etc.

Shortcut guide:

- Page icon exports to Word (very clunky, not recommended)
- Little blue tower thingy creates a new report form that query.
- Pencil lets you edit the query.
- Red X deletes it.
- Excel Icon exports to excel.

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QUERY WATCHES

Once you have generated a query and saved it, you can either login regularly and check your query, OR you can create a query watch.

- Click on "Query Watches" link (above the Query shortcuts).
- This takes you to Administration: New Query Watch.
- You can create a name, select how often you want to be notified of any changes.
- For actions taken on update - we recommend email - then you get the results emailed to you directly.
- Select whether you only want to get reports on records that are new ("IN") or those that have been moved out of the group ("OUT") or ALL. "IN" is probably the most useful information.
- You can then select as many recipients as you want to get the information.
- Include a message to all recipients prefacing the information that will be included.
- Click "add" - the query watch will be live. You can edit it at any time.
- A Lock appears in place of the Red X once the query watch has been set up, that means that you cannot delete it until you stop the watch.

SHARING QUERIES

Right now that is somewhat limited - you can only share queries with core administrative staff (ie. couldn't share queries with each other). We are pushing for that to change in the future and will keep that updated.

RECOMMENDATIONS:

Get in and start playing around with the data that you have access to. Set up your reports.

We know that there are a lot of questions. Join us for the Q and A sessions tomorrow and Thursday. We are also available after that to help with tutoring and setting up the queries, but the more familiar you are with the system, the easier it will be.

Please email Chris (Christopher.bennett@ous.edu) or Giustina (giustina.pelosi@ous.edu) in advance if you already have a question. This will help us prepare our responses. Of course we are also open to spontaneous questions throughout the whole session tomorrow.