



How to maintain information on recruits (SRARECR)

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SRARECR Overview

Recruiters normally use the SRARECR form to enter additional information to existing recruit records. Records generated from the “quick-recruit” process (SRAQUIK form) may need to be updated and expanded during student recruitment. This recruitment may occur during a 30-month period featuring fluctuating information, such as how to contact the student. Recruiters can update recruit information through the SRARECR Banner form.

If recruiters have more than basic information on a prospective student and that student already has a McGill ID without an existing recruit record, SRARECR becomes a suitable form for creating the record.

SRARECR also allows recruiters to view all of a recruit’s information. Viewing recruits through SRARECR can assist in maintaining and evaluating recruitment activities.

Two related query forms are accessible: SRASUMI and SRARINF query forms offer recruitment information that can be extracted into an Excel file.

Details are provided at appropriate steps. Field descriptions for all banner forms are available through the Field Lookup utility online at: <http://www.is.mcgill.ca/whelp/howto/getpdf.htm>. There are online versions and printer friendly versions available.



How to view or update recruit information

Process

Use to view or update information on the recruit record. You may use this form if the recruit already has a McGill ID.

Steps:

To view or update information on the recruit record:

1. Access SRARECR form.
2. In the key block, enter or look up the McGill ID for the recruit you wish to access. You may enter the Term if you know the specific term for the recruit. If not, leave Term blank.
3. Click Next Block to access the **Recruit** tab.
4. **Recruit tab** - Use to view or update fields in the Recruit Data section. Also used to view curriculum information (no updates can be done here).

a. Recruit Data section:

- If the recruit already has recruit record(s), use the scrollbar to locate the recruit record you wish to access.
- View or update any of the fields in this section that apply to the recruit (e.g. Term, Recruiter, Recruit Type).
- If you update any of the fields, click **Save**.

b. Curricula Summary - view existing program information for the recruit. You cannot update the curricula information from this tab.

Recruit Prospect Information SRARECR 8.4 (TBAN2)

ID: 260000605 | Tell, William | Term: | Level: | View Current/Active Curricula

Recruit | Curricula | Sources and Interests | Contacts, Cohorts, Attributes | Comments and Learned

Recruit Data

Term: 201109 | Fall 2011

Selected

Recruiter: 000 | Unassigned

Recruit Type: SA | Science Award

Admission Type: |

Student Type: |

Recruit Status: |

Site: |

Residence: |

Sequence Number: 1 | Registered | Add Date: 17-MAR-2011

Session: |

Educational Level: |

Educational Goal: |

Citizen: |

Full or Part Time: Full Time Part Time None

Legacy: |

Withdrawal Reason: EI | Accepted Employment

Institution Attending: |

Applied: Level All None

Accepted: Level All None

Curricula Summary - Primary						
Priority	Term	Program	Catalog	Level	Campus	Degree
1	201109	B Arts	201109	Undergraduate		Bachelor of Arts

Field of Study Summary				
Priority	Term	Type	Field of Study	Department
1	201109	Major	Undeclared	Arts - Dean's Office



c. **Field of Study Summary** - view existing field of study information. You cannot update the field of study information from this tab.

5. **Curricula tab** - use this tab to update curriculum and/or field of study information for the recruit. Refer to the section called "How to create a recruit record for an existing person - Step 6" for details on how to update curriculum information.
6. **Sources and Interests tab** - The **Sources** block is not used at this time by recruiters. The **Interest** block is used to update the recruit's interests. The **Interest** block is currently shared with other Banner forms. For this reason, recruiters must not update any codes in the Interest field that starts with an A or an H.

7. **Contacts, Cohorts, Attributes tab** - Use to view or update contact information (indicates how the recruit was contacted). The **Contact** field is displayed starting with the most recent, but whenever necessary, use Contact Date and the scroll bar beside it to ensure that you are not adding or updating information already entered for the recruit. **Save** updates. Do not update **Cohort** and **Attribute** blocks.

8. **Comments and Learned tab** - Use this tab to view or update comments. If you have a comment to enter, **Origin** is a required field. Enter the originator code 'RECR' and the desired comment in the **Comments** field. Comments are not mandatory but using the Comments pencil icon makes them easier to view and enter. Click **Next Block** to **Learned** field to add or update information on how the recruit learned about McGill. **Save**

Recruit Prospect Information SRARECR 8.4 (TBAN2)

ID: 2600006886 | Teit, William | Term: | Level: | View Current/Active Curricula

Recruit | Curricula | Sources and Interests | Contacts, Cohorts, Attributes | **Comments and Learned**

Origin | **Comments**

RECR | enter comments here

Learned | **Description** | **Activity Date**

MCGTOUR | McGill Tour | 17 MAR 2011

- Select High School Information [SOAHSCH] from Options menu of SRARECR.
- Click **Next Block** to pull in any information stored for the recruit. If necessary, update or add relevant information in the High School field.
- **Save.**

How to create a recruit record for an existing person

In some cases, you may wish to create a new recruit record for a recruit that already has a McGill ID using SRARECR. This also applies if the recruit already has a recruit record.

1. From SRARECR, enter the McGill ID in the Key Block.

Recruit Prospect Information SRARECR 8.4 (TBAN2)

ID: 260000686 | Tell, William | Term: | Level: | View Current/Active Curricula

Recruit | Curricula | Sources and Interests | Contacts, Cohorts, Attributes | Comments and Learned

Recruit Data

Term: 201109 | Fall 2011

Selected

Recruiter: 000 | Unassigned

Recruit Type: SA | Science Award

Admission Type: |

Student Type: |

Recruit Status: |

Site: |

Residence: |

Sequence Number: 1 | Registered | Add Date: 17-MAR-2011

Session: |

Educational Level: |

Educational Goal: |

Citizen: |

Full or Part Time: Full Time Part Time None

Legacy: |

Withdrawal Reason: EI | Accepted Employment

Institution Attending: |

Applied: Level All None

Accepted: Level All None

Curricula Summary - Primary

Priority	Term	Program	Catalog	Level	Campus	College	Degree
1	201109	B Arts	201109	Undergraduate		Faculty of Arts	Bachelor of Arts

Field of Study Summary

Priority	Term	Type	Field of Study	Department	Attached to Major
1	201109	Major	Undeclared	Arts - Dean's Office	

2. Click **Next Block**.
3. You are now in the **Recruit** block. You can now add a recruit record.
4. If other recruit records exist for this person, click **Record > Insert** to insert a new record.
5. Enter the **Term** field and other fields required for the recruit (e.g. Recruiter, Recruit Type).
6. Click on the **Curricula** tab to enter the curriculum and field of study information.
 - a. **Curriculum:** Many of the fields (e.g. Activity, Key Sequence, Catalog Term, Priority) are filled in by default.
 - Update the Program field. Level, College, Degree fields default in.
 - b. Click on the **Field of Study** tab: If required, enter the **Field of Study** field.
 - Click on the Search icon next to the **Field of Study** field.
 - Select 'Attached Majors/Departments' and select the appropriate Code.
 - Click **Save**.

Recruit Curricula Sources and Interests Contacts, Cohorts, Attributes Comments and Learned

Curriculum Field of Study

Curriculum Record 1 of 1

Current: Activity: ACTIVE Term: 201109 End Term: Key Seq: 1
 Priority: 1 Program: BA Catalog: 201109 Level: UG Campus: College: AR Degree: BA

Field of Study Attached Concentrations: Inactivate:

Current: Type: MAJOR Major
 Activity: ACTIVE Priority: 1 Field of Study: 0000 Undeclared
 Catalog: 201109 Department: 0021 Arts - Dean's Office
 Attached to Major: Created: 17-MAR-2011 JDEROS

Current: Type: Priority: Field of Study: Department: Attached to Major: Created:

Current: Type: Priority: Field of Study: Department: Attached to Major: Created:

Recruit Curricula Sources and Interests Contacts, Cohorts, Attributes Comments and Learned

Curriculum Field of Study

Curriculum Record 1 of 1

Current: Activity: ACTIVE Term: 201109 End Term: Key Seq: 1
 Priority: 1 Program: BA Catalog: 201109 Level: UG Campus: College: AR Degree: BA

Field of Study Attached Concentrations: Inactivate:

Current: Type: MAJOR Major
 Activity: ACTIVE Priority: 1 Field of Study: 0000 Undeclared
 Catalog: 201109 Department: 0021 Arts - Dean's Office
 Attached to Major: Created: 17-MAR-2011 JDEROS

Current: Type: Priority: Field of Study: Department: Attached to Major: Created:

Current: Type: Priority: Field of Study: Department: Attached to Major: Created:

- Enter information in the following tabs: Sources and Interests; Contacts, Cohorts, Attributes; Comments and Learned. For details, see section called "How to view or update recruit information - Steps 6 though 8".

How to withdraw recruit records

Process

Some recruit records may have to be ruled out during recruitment. Normally, recruitment withdrawals signal a change in a recruiter's communication plan. Printed reports will usually assist in this manner.

Withdrawn recruit records are NOT indicated at the person level; they are indicated by Term. This means that the prospect who was recruited for 201109 and decided to delay admission can still maintain a recruit record for 201209. However, it also means that the only indication of his withdrawal is displayed in the Withdrawal/Institution block when the 201109 term is selected.

Steps:

To view or update information on the recruit record:

1. Access SRARECR form.
2. In the Key Block, enter or look up the **McGill ID** for the recruit you wish to access. You may enter the **Term** if you know the specific term for the recruit. If not, leave Term blank.
1. Click Next Block.
2. You are now in the Recruit block.
3. If more than one recruit records exist for this person, use the scrollbar to locate the correct Term from the Recruit Data section.
4. Locate the field **Withdrawal Reason** from the **Recruit Data** section. Click the Search icon to select a reason.
5. **Save.**

The screenshot displays the SRARECR 0.4 (TDAN2) interface. At the top, the browser title is "Recruit Prospect Information SRARECR 0.4 (TDAN2)". The main header shows the prospect's ID as 260000625 and name as Teil, William. The Term is set to 201109, and the Level is blank. There is a checkbox for "View Current/Active Curricula".

The interface is divided into several tabs: Recruit, Curricula, Sources and Interests, Contacts, Cohorts, Attributes, and Comments and Learned. The "Recruit Data" section is active and contains the following fields:

- Term:** 201109 (selected), with a dropdown for "Fall 2011".
- Selected
- Recruiter:** 000 (selected), Unassigned
- Recruit Type:** SA (selected), Science Award
- Admission Type:** (blank)
- Student Type:** (blank)
- Recruit Status:** (blank)
- Site:** (blank)
- Residence:** (blank)
- Sequence Number:** 1
- Registered
- Add Date:** 17-MAR-2011
- Session:** (blank)
- Educational Level:** (blank)
- Educational Goal:** (blank)
- Citizen:** (blank)
- Full or Part Time:** Full Time Part Time None
- Legacy:** (blank)
- Withdrawal Reason:** EI (selected), Accepted Employment
- Institution Attending:** (blank)
- Applied:** Level All None
- Accepted:** Level All None

Below the Recruit Data section, there are two summary tables:

Curricula Summary - Primary						
Priority	Term	Program	Catalog	Level	Campus	Degree
1	201109	B Arts	201109	Undergraduate		Bachelor of Arts

Field of Study Summary					
Priority	Term	Type	Field of Study	Department	Attached to Major
1	201109	Major	Undeclared	Arts - Dean's Office	



Related forms and tasks

Recruiters have access to two other useful query forms related to the SRARECR form: SRASUMI and SRARINF.

The SRASUMI form eases the difficulty of viewing recruitment withdrawals. For example, a prospect has several recruit records in the recruitment term 201109. If the recruit opts for employment instead of McGill, each one of those recruit records has to be accessed and marked as withdrawn separately in SRARECR. After you save the withdrawals in SRARECR, use SRASUMI to query the recruit.

SRASUMI

The SRASUMI form may also be accessed from the **Options** menu while in the Key Block of SRARECR. The SRASUMI form displays a recruit's summary information. Queries are done using the McGill ID. You may also filter the query by entering other fields in the Key Block such as Term, Level, College. For full recruit summaries, it is recommended to enter only the ID in the Key Block and leave the other fields blank.

1. Access SRASUMI
2. In the Key Block, enter the **McGill ID** for the recruit you wish to access. It may already be there if you accessed SRASUMI from SRARECR.
3. Click Next Block to **Prospect Summary** to view the query results. To narrow down results, you may query on additional fields. This is not necessary if there are not many records.
4. To view curriculum-related information, select a recruit record from the **Prospect Summary** block. The **Curricula Summary** and **Field of Study Summary** blocks contain the curriculum information for the selected records.

The screenshot shows the SRASUMI Prospect Summary form. At the top, there are search filters for ID (260000685), Name (Tell, William), Level, Campus, College, Degree, Term, Program, Field of Study Type, and Field of Study Code. Below the filters is a table titled "Prospect Summary" with columns: Term, Sequence Number, Selected Primary, Recruiter, Recruit Type, Admission Type, Student Type, Residence, Withdrawal Reason, and Institution Attending. The table contains two rows for the term 201109, with sequence numbers 2 and 1. Below the table are three summary blocks: "Curricula Summary - Primary" showing details for Priority 1, Term 201109, Program B Arts, Catalog 201109, Level Undergraduate, Campus, College Faculty of Arts, and Degree Bachelor of Arts; "Field of Study Summary" showing Priority 1, Term 201109, Type Major, Field of Study Undeclared, Department Arts - Dean's Office, and Attached to Major; and a third empty summary block.

