Adding (or modifying) a Prospect Record

Event Attendance and Meeting Information

Description
This script will describe how to enter data related to Events which an individual has attended or been invited to attend. You can also enter Meetings within an event to track an individual’s participation in components of an event. Any Event or Meeting you wish to add to an individual’s records must have been created in Event set-up (see process AR 044 Managing Events). This information is secured by Institution (UMS customization).

Process Steps

Navigation: Student Recruiting > Maintain Prospects > Create/Update Prospects

Step 1: The Prospect Data Search Page
Locate the prospect on the database if necessary.

1.1 Entering Search Criteria

1.1.1 ID: If you know the student’s EMPLID, enter it here. This is the most efficient way to search for a student.

Effective Date: July 31, 2006
Updated: 01/30/2006
1.1.2 Academic Institution: This is a required field to locate the prospect.
1.1.3 Academic Career: Enter if known, undergrad or grad
1.1.2 Campus ID: The University of Maine System is not currently using the Campus ID.
1.1.3 National ID: If you know the student’s National ID number (Social Security Number for USA, Social Insurance Number for Canada), enter it here.

1.1.4 Last Name: You can enter a portion of the last name as search criteria.
1.1.5 First Name: You can enter a portion of the first name as search criteria.

1.1.6 Click [Search] to continue or [Clear] to have the system clear all of the text boxes so you can start again.

**Step 2: Entering Event Data**

When you have completed navigation, you will be presented with the Attendee Events page. Note that you can add multiple rows to the individual’s event attendance record, and that you can track meeting attendance within an event using the [Meeting] link.

2.1 Use the Lookup icon, 🔍, to find the code for the event you wish to add to the record. On the Lookup Event ID page, you can narrow your lookup by entering criteria. All event Types begin with the campus letter, e.g., O for UMaine events.

2.2 After clicking [Lookup], you will see a list of eligible events from which to choose.

**Look Up Event ID**

<table>
<thead>
<tr>
<th>Event ID:</th>
<th>begins with</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Type:</td>
<td>begins with</td>
</tr>
<tr>
<td>Academic Institution:</td>
<td>begins with</td>
</tr>
<tr>
<td>Description:</td>
<td>begins with</td>
</tr>
</tbody>
</table>

[Look Up] [Clear] [Cancel] [Basic Lookup]

**Search Results**

<table>
<thead>
<tr>
<th>Event ID</th>
<th>Event Type</th>
<th>Academic Institution</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>000000002</td>
<td>FOR</td>
<td>USM001</td>
<td>Criminal Law Forum</td>
</tr>
<tr>
<td>000000003</td>
<td>MAWE</td>
<td>USM01</td>
<td>UMA Welcome Workshop</td>
</tr>
<tr>
<td>000000004</td>
<td>D0HS</td>
<td>USM01</td>
<td>UM February 2005 Open House</td>
</tr>
<tr>
<td>000000005</td>
<td>PTC</td>
<td>USM02</td>
<td>Pine Tree Consortium UMF</td>
</tr>
<tr>
<td>000000010</td>
<td>FO18</td>
<td>USM001</td>
<td>USM Open House October 2005</td>
</tr>
</tbody>
</table>

2.3 Click on the Event you wish to use; it will return you to the Attendee Events page. The event you selected will appear on the page.
2.4 Click **Meeting** to track the individual’s status for the event (invited, attended, etc.).

2.5 Use the Lookup icon, **Lookup**, in the **Event Meeting** field to find the code for the Meeting you wish to add. You will be presented the **Lookup Event Mtg** page. After clicking **[Lookup]**, you will see a list of eligible events from which to choose.

2.6 Click on the Meeting you wish to use; it will return you to the Attendee Meetings page. The meeting you selected will appear on the page.

2.7 In the Status field, select the appropriate status for the Meeting (Attended, Invited, Not Attended, Will Attend).

2.8 You can enter additional Meetings by clicking on the **+** and repeating steps 2.5 and 2.7.

2.9 Once you finished entering Meetings, click **[OK]** to be returned to the Attendee Events page for this individual.

2.10 You can enter additional Events by clicking on the **+** and repeating steps 2.1 – 2.9.

2.11 On the Attendee Events page, click **[OK]** to be returned to the Prospect School/Recruiting panel for this individual.

2.12 Click **[Save]** to save your changes to the individual’s record.

APPROVED by Admissions and Campus Community Team on January 30, 2006