

# 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**

**Prospect School/Recruiting**

[Events link](#)

#### **Step 1: The Prospect Data Search Page**

Locate the prospect on the database if necessary.

##### **1.1 Entering Search Criteria**

**Create/Update Prospects**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**   **Add a New Value**

---

**ID:**   begins with ▾   0138386   🔍

**Academic Institution:**   = ▾   UMS05   🔍

**Academic Career:**   = ▾   ugrd   🔍


**Campus ID:**   begins with ▾  

**National ID:**   begins with ▾  

**Last Name:**   begins with ▾  

**First Name:**   begins with ▾  

Include History    Correct History    Case Sensitive


**Search**   **Clear**   [Basic Search](#)    [Save 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.

- 1.1.2 **Academic Institution:** This is a required field to locate the prospect.
- 1.1.3 **Academic Career:** Enter it 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

Event ID:



Event Type:  

Academic Institution:  

Description:

**Look Up** **Clear** **Cancel** [Basic Lookup](#)


#### Search Results

View All First  1-5 of 5  Last

Event ID	Event Type	Academic Institution	Description
<a href="#">000000002</a>	<a href="#">LFOR</a>	<a href="#">UMS06</a>	<a href="#">Chicago Law Forum</a>
<a href="#">000000003</a>	<a href="#">AWWS</a>	<a href="#">UMS01</a>	<a href="#">UMA Welcome Workshop</a>
<a href="#">000000004</a>	<a href="#">OOHS</a>	<a href="#">UMS05</a>	<a href="#">UM February 2005 Open House</a>
<a href="#">000000005</a>	<a href="#">FPTC</a>	<a href="#">UMS02</a>	<a href="#">Pine Tree Consortium UMF</a>
<a href="#">000000010</a>	<a href="#">POHS</a>	<a href="#">UMS06</a>	<a href="#">USM Open House October 2005</a>

- 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.

Attendee Events					
Events					
Customize   Find   First 1 of 1 Last					
*Event ID	Description	Short Description	Attendee	Meeting	
000000004	UM February 2005 Open House	UMOpenHse	00000	Meeting	+ -

- 2.4 Click **Meeting** to track the individual's status for the event (invited, attended, etc.).
- 2.5 Use the Lookup icon, , 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.

Attendee Meetings					
Meetings					
Customize   Find   First 1 of 1 Last					
*Event Mtg	Description	Meeting Date	Meeting Start Time	Meeting End Time	Status
1	February 2005 Open House	02/21/2005	8:00AM	2:00PM	Attended

- 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