# Requesting a Prospect Advisement Report

**Purpose:** A **Prospect Advisement Report** shows degree progress based on the courses the student proposes to take as well as including transfer credit. There are two parts to the procedure:
1. Prior to requesting the report, "Program What-If" data must be entered. Add the student to the Student Group – ADPM.
2. Request the Prospect Advisement Report.

## Setting up Program What If Data
*Tip:* Before you begin, review the student's **program** & **plan** on their current application. This information must be consistent with the What If data.

| Step | Action |
|------|--------|
| 1. | Navigate to the **Set Up What If Data** page. **Main Menu › Academic Advisement › Student Advisement › Set Up What If Data**<br><br>Favorites \| Main Menu > Academic Advisement > Student Advisement > Set Up What-If Data<br><br>**Set Up What-If Data**<br><br>Enter any information you have and click Search. Leave fields blank for a list of all values.<br><br>Find an Existing Value \| Add a New Value<br><br>Maximum number of rows to return (up to 300): 300<br>ID: begins with<br>Campus ID: begins with<br>Last Name: begins with<br>First Name: begins with<br>☐ Include History ☐ Correct History<br><br>Search \| Clear \| Basic Search \| Save Search Criteria |
| 2. | Click the **Add New Value** tab<br><br>**Set Up What-If Data**<br><br>Find an Existing Value \| Add a New Value<br><br>ID:<br><br>Add |
| 3. | Enter student ID and click the **Add** button. |

| Step | Action |
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| 4. | On the *Program What-If* tab, complete the following:<br><br>• **Program Status** – Select *All Status*<br>• **Academic Institution** – Enter or select *UNICS*<br>• **Status** – Select *Include*<br>• **Academic Career** – Select *Undergraduate\**<br>• **Career Requirement Term** – LEAVE BLANK<br>• **Requirement Term** – *Enter as appropriate (Admit term from application)*<br>• **Academic Program** – *Enter as appropriate (same as application)*<br>• **Admit Term** – LEAVE BLANK<br>• **Expected Grad Term** – LEAVE BLANK<br><br>\*The **Requirement Term** and **Academic Program** fields may automatically populate based on the selection in this field. |

Program What-If | Plan What-If | SubPlan What-If

Pam Panther ###### 

Copy from student record: Copy   Program Status   ActiveOnly ▾

Find | View All   First ◀ 1 of 1 ▶ Last   ➕➖

*Academic Institution: UNICS 🔍   University of Northern Iowa

*Status: INCL 🔍   Include

Academic Career: UGRD 🔍   Undergraduate   Student Career Nbr: 0 🔍

Career Requirement Term: 🔍   ☐ Joint Prog Appr

*Requirement Term: 2121 🔍   SUMMER 2012   Dual Academic Program: 🔍

*Academic Program: HFNUG 🔍   Hum & Fine Arts & Nat Sci-Ugrd   Campus: 🔍

Admit Term: 🔍   Acad Load: Full-Time ▾

Expected Grad Term: 🔍

| Step | Action |
|------|--------|
| 5. | Click the *Plan What-If* tab. Complete the following: <br><br> • **Requirement Term** – *Enter as appropriate (Admit term from application)* <br> • **Academic Plan** – *Enter or select as appropriate (same as application)* <br> • **Plan Sequence** – The first plan defaults to 10. Additional plans are sequenced by ten (e.g. 10, 20, 30) <br> • **Advisement Status** – Select *Include* <br><br>  <br><br> *Note:* Use the **Add Row** button ➕ to add additional plans. |
| 6. | Click the **Save** button. 💾 Save |
| 7. | Add the student to the Student Group **ADPM** (Prematric ADVPM Report Values). <br><br> • Navigate to: **Main Menu › Student Admissions › Application Entry › Academic Information › Student Groups** <br> • Select *ADPM* in the **Student Group** field <br> • Select *today's date* as the **Effective Date** <br> • Select *Active* in the **Status field** <br> • Click the **Save** button <br><br> **Note:** Putting the student in the ADPM student group will remove some requirements currently set up on the residency academic requirement. You may request the report without putting the student in the student group however; you will then see the residency academic requirement. |
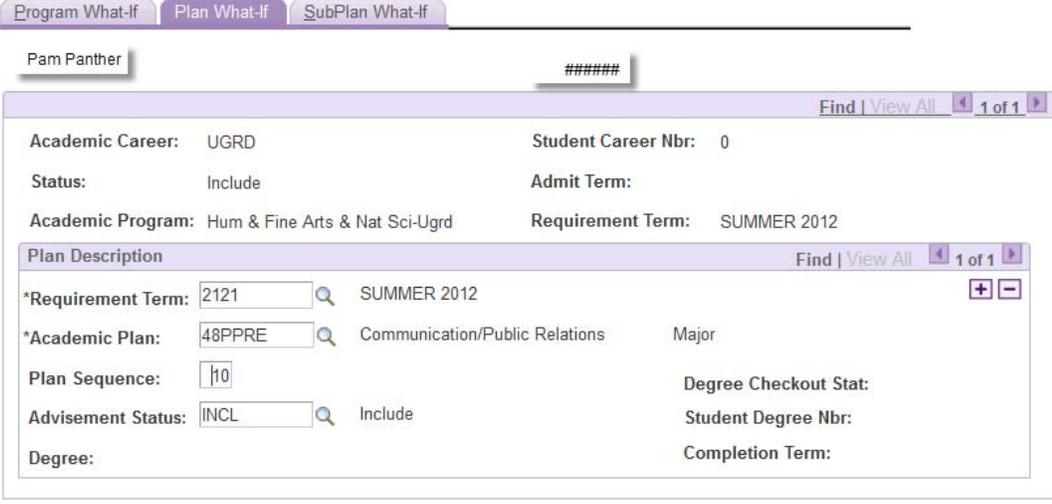
## Requesting the Prospect Advisement Report (Transcript Type)
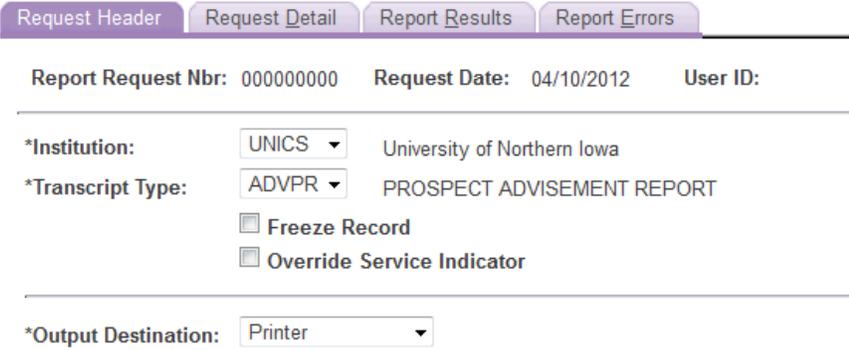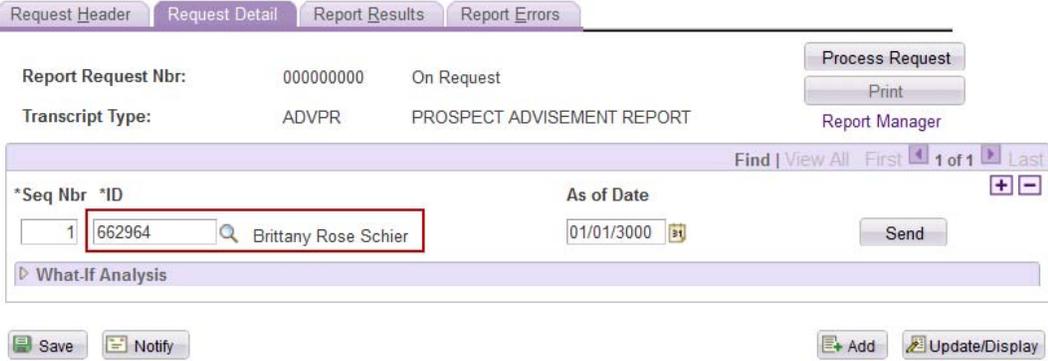
| Step | Action |
|------|--------|
| 1. | Navigate to the **Student Advisement Report** page. **Main Menu › Academic Advisement › Student Advisement › Student Advisement Report**<br><br>Favorites \| Main Menu > Academic Advisement > Student Advisement > Student Advisement Report<br><br>**Student Advisement Report**<br><br>Enter any information you have and click Search. Leave fields blank for a list of all values.<br><br>Find an Existing Value \| Add a New Value<br><br>Maximum number of rows to return (up to 300): 300<br>**Current User ID:** = ▼ rajones<br>**Report Request Nbr:** begins with ▼<br>**ID:** begins with ▼<br>**Academic Institution:** begins with ▼ |
| 2. | Select the **Add a New Value** tab.<br>*Result:* The *Request Header* tab displays. |
| 3. | On the *Request Header* tab, complete the following:<br>• Institution – Select *UNICS*<br>• Transcript Type – Select *ADVPR* (Prospect Advisement Report)<br>• Output Destination – Select *Printer*<br><br>Request Header \| Request Detail \| Report Results \| Report Errors<br><br>**Report Request Nbr:** 000000000  **Request Date:** 04/10/2012  **User ID:**<br><br>*Institution:* UNICS ▼  University of Northern Iowa<br>*Transcript Type:* ADVPR ▼  PROSPECT ADVISEMENT REPORT<br>☐ Freeze Record<br>☐ Override Service Indicator<br><br>*Output Destination:* Printer ▼ |

| Step | Action |
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| 4. | Select the *Request Detail* tab. Enter the student's ID in the **ID** field. Press the tab key to display the student's name. |
| 5. | Expand the What-If Analysis by clicking the **Expand** icon. ▶ **What-If Analysis**<br><br>Check the **Enable Stored What-If** box. Click the **Stored What-If** link. |
| 6. | Change the **Program Status** from *Active Only* to *All Status*. |
| 7. | Click the **Apply** button. ☐ Apply  Click the **OK** button. ☐ OK |
| 8. | Click the **Process Request** button. ☐ Process Request<br><br>*Result:* The request will process. The processing icon (spinning wheel) will display in the right corner of the screen. Once processing is complete, the word **Saved** will display briefly and the html web version displays. |
| 9. | Click the **Print** button. ☐ Print<br><br>*Note:* The word **Saved** will briefly display. The report is not physically printing; it is being set up as a PDF file. |

| Step | Action |
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| 8. | Click the **Report Manager** link.  |
| 9. | The report displays in the list on the *Administration* tab. Sometimes this can take a few seconds. If you do not see your report, click the **Refresh** button until your report displays. Continue to click the **Refresh** button until the report status is "Posted". Click the report (Transcript).  *Result:* The report displays in PDF format. You may now print the report using the **Print** button on the PDF toolbar.  |
| 10. | Remove the student from the Student Group ADPM. |