

LSAC Unite Essentials

Managing People, Part III - Group Actions and Edits

Updated: 5/6/2024

## Exercise 1 – Batch Update a Group of Person Records JD

**Task** Use batch edit to update prospect program information for a group of people.

**Scenario** Your law school just hosted a well-attended virtual program for prospective students. Interested attendees completed a Prospect Form and their information is in Unite. In reviewing their information, you realize that 7 of them were interested in your school's JD/MBA program. Add the Prospect Program Degree of JD/MBA to the Person Records of those 7 prospects.

If you'd like to try the exercise on your own without detailed instructions, feel free to do so. If not, detailed instructions follow.

### Guided Practice



This training exercise has four parts. The first part walks you through how to find the person records. The second part walks you through how to organize the grid. The third part walks you through how to edit the people records. The fourth part walks you through how to verify the update.

#### Part 1: Find the Person Records

1. Click **PEOPLE**.
2. Be sure you are on the *Search Criteria* tab. Click **Clear**.
3. In Person Search Fields area:
  - a. Select Stage and choose **Prospect**.
  - b. Select Person Status and choose **Interested**.
  - c. Select Person Sub-Status and choose **Prospect Form**.

- d. Select Expected Enroll. Year and choose **2024**.
4. Click **Search**.

## Part 2: Organize the Grid

1. On the *Search Results* tab, find your records by filtering for your Greek name on the Last Name, First Name column.
  - a. Click the Grid Settings menu . Within the menu, select **Filter, Contains**, then enter the text to reflect [Greek]- with no space between your Greek and the dash.
2. Add additional columns.
  - a. Click the Grid Settings menu  on any column. Within the menu, select **Columns**, then enter text in the *Search Columns* textbox to locate the field.
  - b. Using the *Search Columns* textbox, add the columns **Prospect Program Degree** to the Grid, if not already showing.
3. Click **Save** within the menu. The new column appears in the grid to the right.
4. Notice that the new column is empty.

## Part 3: Add the Program Information to Multiple People

1. Select check boxes for the people (with your Greek letter only, see Part 1 Step 1) in the grid.
2. Click **Actions**.
3. Click **Edit** from within the Actions menu.
4. Select **Apply the same edit to all selections**.
5. Click **Continue**.
6. Select check box for **Prospect Program** in the Available Fields box.
7. Click **Add**.

8. Click **Continue**.
9. In the Edit Window, select Degree and from drop-down choose **JD/MBA**.
10. Click **Submit**.
11. Verify your edit.
12. Click **Confirm**.
13. Remain on the *Search Results* tab and leave the people on the grid.

#### **Part 4: Verify the Prospect Program Information**

1. Notice that the **Prospect Program Degree** column shows the Prospect Program Degree as JD/MBA for your selected prospects.
2. Additionally, this can be verified within your selected prospect's person records, under **Prospect Level Information**.