

LSAC Unite Essentials
Managing People Part III
Updated: 5/6/2024

Exercise 1 – Batch Update a Group of Person Records LLM

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 LLM students. Interested attendee information is in Unite. In reviewing their information, you realize that 5 of them were interested in your school's spring term. Add the new term and expected entry year to the Person Records of those 5 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**.
4. Click **Search**.

Part 2: Organize the Grid

1. On the *Search Results* tab, add the additional columns **Prospect Program Degree**, **Prospect Program Term**, and **Expected Entry Year**.
 - 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, select the three new columns in order to add them to the Grid.
2. Click **Save** within the menu. The new columns appears in the grid to the right.
3. Filter the new column **Prospect Program Degree** so that it contains only **LLM** prospects.
4. Next, 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.
5. Click **Filter** to view the prospects with your name who are interested in the LLM program.

Part 3: Add the Program Information to Multiple People

1. Select check boxes for any five of the people (with your Greek letter only, see Part 1 Step 4) 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 **Term** and from drop-down choose **Spring** and select **Year** and choose **2025**.
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 Term** column shows the term as **Spring** and the **Expected Entry Year** column shows as **2025** for your selected prospects.
2. Additionally, this can be verified within your selected prospect's person records, under **Prospect Level Information**.