

LSAC Unite Essentials  
Managing People Part 2  
Updated: 3/15/2024

## Exercise 1 - Search for People JD

**Task** Search for prospects who are scheduled to take a future LSAT.

**Scenario** You want to know how many people in the prospect stage are expected to enroll in 2024 and are scheduled to take a future LSAT. Search for prospects with an expected entry year of 2024 and then organize the grid to show the people with a future test date.

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 two parts. The first part walks you through how to find the person records. The second part walks you through how to view the data by organizing the grid.

#### Part 1: Find the Person Records

1. Click **PEOPLE**.
2. On the Search Criteria tab, click **Clear**.
3. From Person Search Fields, select Stage and choose **Prospect**.
4. Select Expected Enroll. Year and choose **2024**.
5. Click **Search**. You will have several hundred people in your search results.

## Part 2: Organize the Grid

6. On the Search Results tab, add the column **Prospect - Future Test Date**.
  - a. Do this by clicking the Grid Settings menu icon  in any column header. Select **Columns**.
  - b. To find the column quickly, enter text in the *Search Columns* textbox to locate the field – such as *future*.
  - c. Click the checkbox next to the column name.
  - d. Click **Save** in the column chooser menu to return to the grid.
7. Remove the alphabetical sort from the Last Name, First column by clicking the column header twice.
8. Click the Grid Settings menu icon  in the **Prospect - Future Test Date** column header.
9. Filter within the Grid Settings Menu by specifying both of the following filters using OR as the operator.
  - a. Select **Filter, Contains**, then enter the text to reflect:
    - i. Contains 2024 **Or**
    - ii. Contains 2025
10. Click **Filter**.
11. Sort the Prospect Future Test Date column in **descending** order.
12. You will see several records with a future test date after today.