LSAC Unite Essentials
Managing People Part 4
Updated 3/18/2024

Exercise 2 - Add a Grouping to Multiple Person Records – LLM

Task Edit multiple people records to add a grouping.

Scenario You have a group of LLM applicants who are planning to enter in the spring – you updated their term in a previous exercise. Now you want to add the **Incoming Spring 2025** grouping to their records to add more information. Then you will check one person's record to verify the correct grouping appears.

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

Note that this exercise will work only if you have completed the "Import Prospects from an Event" exercise done in Session 1 of Unite Essentials. If you did not complete that exercise, ask your trainer for guidance on how to proceed with this one.

Guided Practice

This training exercise has three parts. The first part walks you through how to find the person records. The second part walks you through how to edit the records to add a grouping. The third part walks you through how to check one person record to verify the accuracy of the grouping.

Part 1: Find the Person Records

1. Click **PEOPLE**.

2. In the Search Criteria tab, click **Clear**.

3. From Prospect Search Fields area, select the Stage of **Prospect** and Expected Enrollment Year of **2025**.

4. Click **Search**.

5. On the *Search Results* tab, find your records by filtering the Last Name, First column to show records that contain your Greek letter.

6. Click any column's Grid Settings menu ⋮ and select **Columns**.

7. Add the columns **Grouping**, **Grouping Date, Prospect Program Degree, Prospect Program Term, and Expected Entry Year** (if not already showing) by clicking the checkbox next to the fields in the column chooser - use the *Search Columns* textbox to locate the columns quickly.

8. Click **Save**.

9. Filter the **Prospect Program Degree** column to ensure you are working with your LLM prospects.

Part 2: Add the Grouping

1. Select all the records.

2. Click **Actions**.

3. In the Actions drop down menu, select **Edit**.

4. In the Edit options, select **Apply the same edit to all selections**.

5. Click **Continue**.

6. From the Available Fields area, select the **Grouping** checkbox. Notice that the Grouping Date and the Grouping fields are auto selected.

7. Click **Add**

8. Click **Continue**.

9. Select **Incoming Spring 2025-[Greek]** from the Grouping drop down menu options.

10. Specify the Date.

11. Click **Submit**.

12. Verify your changes.

13. Click **Confirm**.

Part 3: Check the Grouping

1. On the *Search Results* list, notice the Grouping column now displays Incoming Spring 2025-[Greek} along with the Grouping Date you updated.

2. If you would like to look in a person's individual record, select one person's name.

3. Expand the **Source/Groupings** panel.

4. Notice the Grouping *Fall Recruiting Leads-[Greek]* and its date

5. Click X to close the record.

6. Click **HOME**.