

LSAC Unite Essentials
Managing Applications Part II
Updated 3/19/2024

Exercise 2 - Archive a Person Record - JD

Task: Archive a person record.

Scenario: Emily Jackson applied to your school and decided to withdraw before her review process was completed. Close the application and archive the person record. You will have to update her application status to Withdrawn before you can close it. Once closed, notice that the Stage updates to Prospect with the Status of Previous Applicant.

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

The training exercise has three parts. The first part walks you through how to find the person record. The second part walks you through how to archive the person record. The third part walks you through how to verify the archived person record.

Part 1: Find the record

1. Click PEOPLE
2. On the Search Criteria tab, click **Clear** to clear the previous search.
3. Specify person search criteria.
 - a. Last name: Jackson
 - b. Stage: Applicant
4. Click **Search**.

Part 2: Archive the person record

1. Click person name: Jackson, [Greek]-Emily

2. Click **Close** on the application menu.
3. When the error message pops up indicating that the application is not in a final status and so cannot be closed, click **Ok**.
4. Click **Edit**.
5. Click and expand the *Application Status* section.
6. Update application status.
 - a. Application Status: Withdrawn
 - b. Application Sub-Status: Withdraw Before Decision
7. Click **Save**.
8. Click **Close** on the application menu.
9. Click **Yes** to confirm.
10. Click **Yes** to archive the person record.
11. Notice the record has the word “Archived” after the Emily’s name, indicating the record is now archived.
12. Click **X** to close person record.

Part 3: Verify the archived person record

1. On the Search Criteria tab, click **Clear** to clear the previous search.
2. Specify person search criteria.
 - a. Last Name: Jackson
 - b. Select **Include Archives**
3. Click **Search**.

4. Notice the archived icon beside Jackson, [Greek]-Emily's record in the Search Results grid.