

LSAC Unite Essentials
Recruiting Tools Part II
Updated: 3/19/2024

Exercise 2 - Import Prospects who Requested Information - JD

Task: Run an import job to bring a list of prospects into Unite.

Scenario: You received a list of people who submitted an information request on the school website. You created an import template and are ready to import your file.

Your import file is found in the JD Participant Toolkit you downloaded from the Training Exercises area of the Unite Support Site. You will use the file corresponding to your Greek letter.

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

1. Be sure you downloaded the JD Participant Toolkit Zip File and extracted the files.
2. On the File Processing tab, click **Imports**.
3. Specify the information for the import:
 - a. File type: Data Import Templates
 - b. File Layout: Prospect Upload [Greek]
 - c. Header row included in file: Yes
 - d. If No Match, Create New Person Record / Add Data: Yes
 - e. Click **Ok** to confirm adding a new person record
4. Click **Select file**.
5. Select file to import: *[Greek] JD.csv*.

6. Click **Open** or double-click the file so it appears.
 - a. Alternatively, drag and drop the file to place it in the *Drop file here to upload* area
7. Click **Preview Import** and check that there are no errors.
8. Click **Import**.