

LSAC Unite Essentials
Managing Person Records Part 1
Updated: 6/10/2024

Exercise 3 - Edit a Person Record LLM

Task: Add a profile document to a person record.

Scenario: Jessie James has been very engaged with your admissions office but has not applied yet. Jessie forwarded his resume earlier in the week. Add the document (from the participant toolkit) to Jessie's person record in Unite.

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 three parts. The first part walks you through how to find the person record. The second part walks you through how to add a person document to the person record. The third part walks you through how to view the document in person record.

Part 1: Find the Person Record

1. Click **PEOPLE**.
2. On the Search Criteria tab, click **Clear**.
3. Enter the last name: James.
4. Enter the first name: Your Greek letter
5. Click **Search**.

Part 2: Add the Profile Document to the Person Record

1. Click the checkbox to select the Person Name: James, [Greek]-Jessie.

2. Click **Actions**.
3. Click **Upload Document**.
4. Select document type: **Resume**.
5. Click **Select file**.
6. Navigate to Participant Toolkit to locate the File.
7. Either double-click file name: LOR or single-click the file and click **Open**.
 - a. As an alternative, you can drag the drag and place it in the Drop file here to upload area of the Add Document window.
8. Click **Upload**.
9. Click **X** to close.

Part 3: Open the Person Record to locate the Document

1. Click name of the person: James, [Greek]-Jessie.
2. Click to expand the Profile Documents panel.
3. Notice the *Resume* document in the grid.
4. Click the document to view.
5. Close the document when done viewing.
6. Click **X** to close the person record.