

LSAC Unite Essentials
Managing People Part II - Grids and Views
Updated: 5/6/2024

Exercise 3 - Export Information from a Grid JD

Task: Export information from the Search Results grid to an .XLSX file.

Scenario: Your dean asked for a list of all applicants who have been admitted for the current term. Perform a person search and export the results so you can share them.

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 perform a person search. The second part walks you through how to organize the grid. The third part explains how to export the search results to an .XLSX file. Allow pop-ups in your browser for this URL address.

Part 1: Find the Person Records

1. Click **PEOPLE**.
2. In the Search Criteria tab, click **Clear**.
3. From Person Search Fields area specify the search criteria:
 - a. Stage: **Applicant**
4. From the Application Search Fields area specify the search criteria:
 - a. Term: **Fall**
 - b. Year: **2024**

- c. Degree Applied: **JD**
 - d. Application Status: **Admitted**
5. Click **Search**. You will have over 900 records in your search results.

Part 2: Organize the Grid

1. On the Search Results tab, click on any column to access the Grid Settings menu.
 - a. Do this by clicking the Grid Settings menu  on any column.
 - b. Scroll within the column chooser, or type in the textbox, to find the next columns.
 - c. Deselect the checkbox next to the names of these columns to hide them:
 - i. Person Status column
 - ii. Person Sub-Status column
 - iii. Special Interest column
2. Click **Save**.

Part 3: Export grid information

1. Locate the **Export to Excel** icon in the row above the grid.
2. Click the icon, **Export to Excel**.
3. View the export file.
4. Close the export file.
5. Click **HOME**.