



Law School Support Services HOW TO ...

Customize Prospect Search Results

You can customize the search results grid to hide or show columns, to apply different levels of filtering, and to group categories.

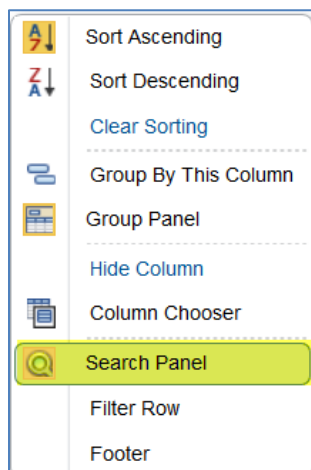
Search for a Prospect

Search for a prospect by entering search criteria. Results are limited to 10,000 records. You can specify the number of results by adjusting the page size. You can move to a particular page by selecting the page number.

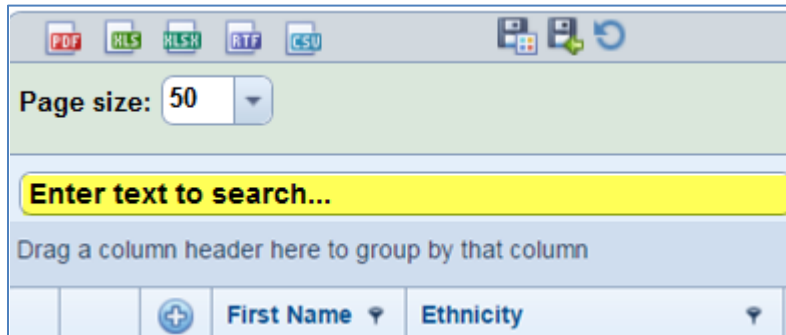
Filter Results with the Search Panel

Use the Search Panel to enter text and filter on data displayed in the search results screen.

1. If the Search Panel is not displayed, right-click on any column header and select **Search Panel**.

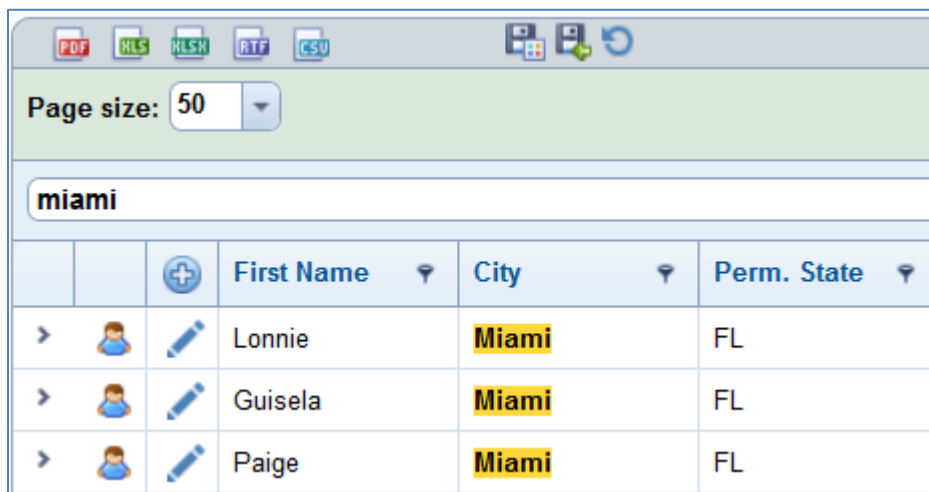


2. Enter text to begin your search.



The screenshot shows the LSSS search interface. At the top, there are icons for PDF, XLS, XLSX, RTF, and CSV. Below these is a 'Page size: 50' dropdown. A yellow search bar contains the text 'Enter text to search...'. Below the search bar is a prompt: 'Drag a column header here to group by that column'. At the bottom, there are column headers: a plus icon, 'First Name', and 'Ethnicity'.

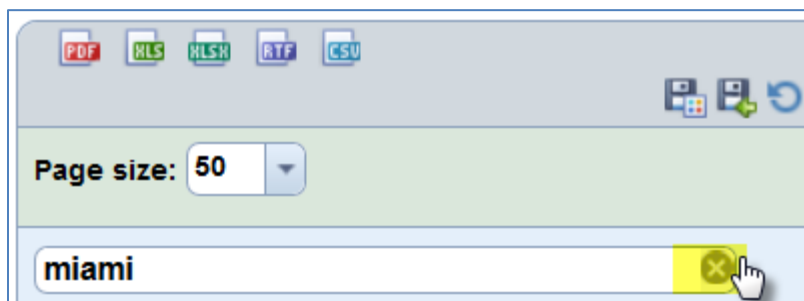
3. The screen will respond as you type and the search results are filtered. Notice that the search text is highlighted in the results grid.



The screenshot shows the LSSS search interface with the search bar containing 'miami'. Below the search bar is a table with the following columns: a plus icon, 'First Name', 'City', and 'Perm. State'. The table contains three rows of results, all with 'Miami' highlighted in the 'City' column.

		+	First Name	City	Perm. State
>			Lonnie	Miami	FL
>			Guisela	Miami	FL
>			Paige	Miami	FL

4. To clear the text search filter and show all search results, click on the X.



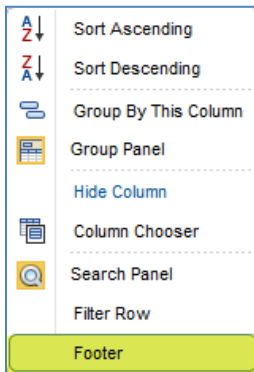
The screenshot shows the LSSS search interface with the search bar containing 'miami'. A yellow button with a black 'X' is visible next to the search bar, indicating the clear button.

5. To hide the Search Panel, right-click on any column header and deselect the **Search Panel**.

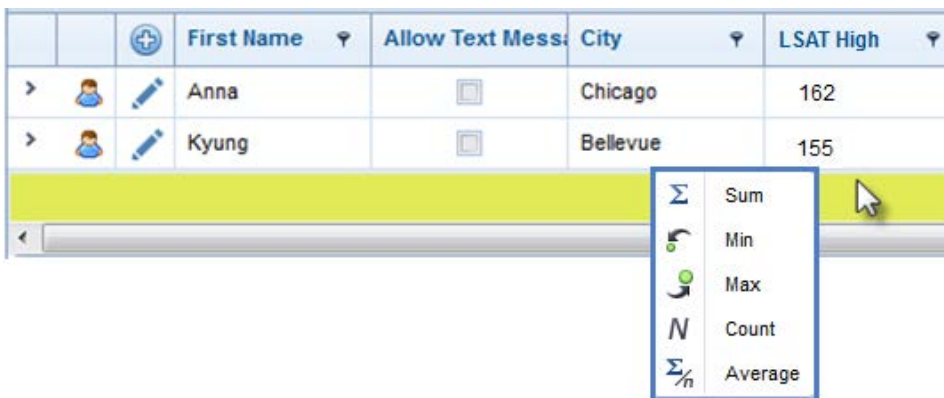
Using Mathematical Functions with the Footer Tool

The footer area contains mathematical functions such Sum, Average, Min, Max, and Count.

1. To activate or deactivate a footer, right-click on any column header and select **Footer**.



2. When the footer is activated, right-click on an area at the bottom of a column and choose the function.



3. The calculations appear in the footer. You can apply multiple functions to a single column and include functions with additional columns.

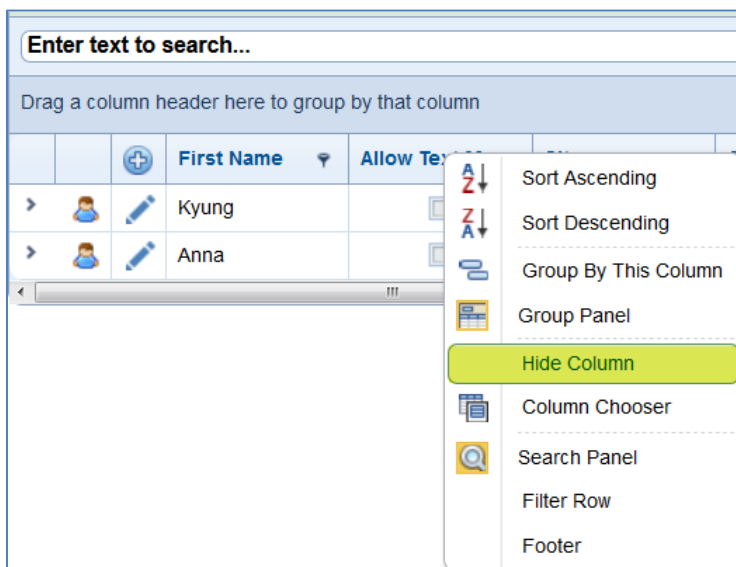
		+	First Name	Allow Text Mess	City	LSAT High
>			Anna		Chicago	162
>			Kyung		Bellevue	155
						Min=124 Max=180 Avg=153

Hide and Show Columns

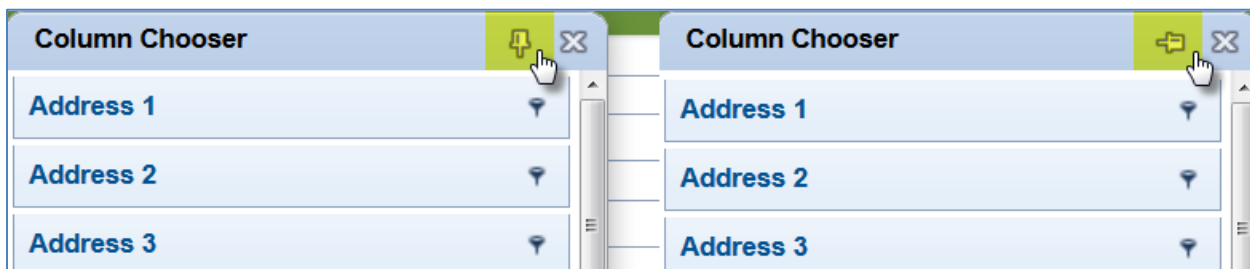
There are default columns displayed on the prospect search results grid. However, you can control the columns shown here with the exception of the Expand Detail icon.

When you change the display of the columns, be sure to save the layout. The save options are located above the search results grid.

1. To hide a column from the search results grid, right-click on the column header and select **Hide Column** from the menu. Wait for the screen to refresh. Please note that only one column can be hidden at a time.

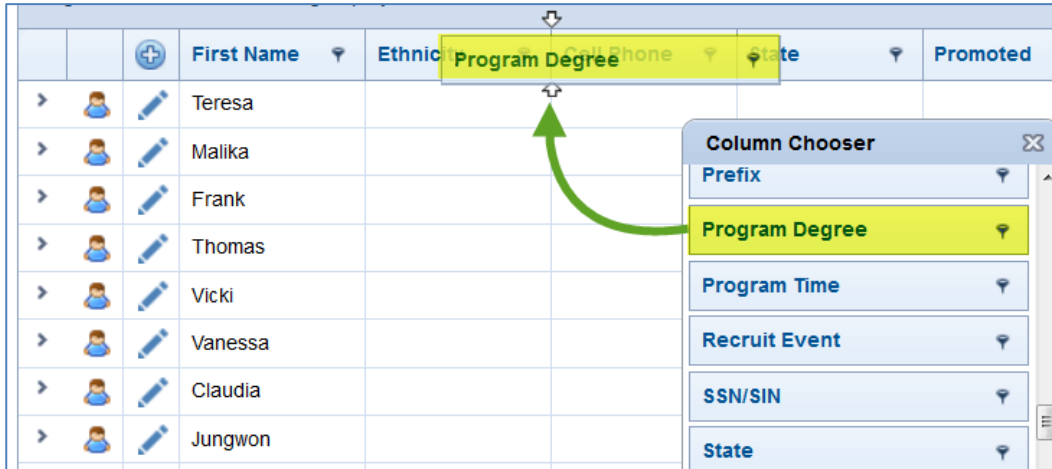


2. To show columns, right-click on any column header and select **Column Chooser** from the menu.



3. Anchor the location of the Column Chooser by selecting the thumbtack icon. Unlock its position by reselecting the icon.

- Click on the column and drag it to the desired location. There are arrow indicators to show you where the column will be placed. Once the column is placed, it will be removed from the Column Chooser.



- To save your search results grid, select the **Save Current Layout** icon.



- If you want to revert to the most recently saved layout, select the **Restore Previously Saved Layout** icon.
- If you want to return to the default display, select the **Reset to Default Layout** icon.

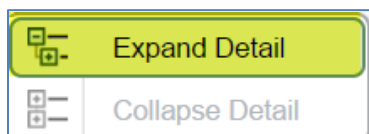


- To close the Column Chooser, click the **X** at the top right.

Access the Prospect Overview

You can access an overview of the prospect's record within the search results grid. The overview contains the prospect's profile, contact information, and program. In addition, an auditing feature shows information on the creation and modification of a record.

- To access, right-click the row containing the prospect you want to view. Select **Expand Detail**.



Profile	Contact Information	Program	Auditing
Name: Prasad Vineeta SSN: 555-55-5555 LSAC Acct. No: L99999999 Date of Birth: 3/18/1988 12:00:00 AM Gender: Female Ethnicity: Asian/Pacific Islander			

- The Prospect Overview window appears and is organized by tabs. Select the corresponding tab to view the content.
- To close the Overview, right-click the window and select **Collapse Detail**.

Profile	Contact Information	Program	Auditing
Name: ⊕ Expand Detail SSN: ⊖ Collapse Detail LSAC Acct. No: ⊖ Collapse Detail Date of Birth: ⊖ Collapse Detail Gender: Female Ethnicity: Black/African American			

Filter Columns Individually

You are able to apply a selection filter to individual columns of the search results grid.

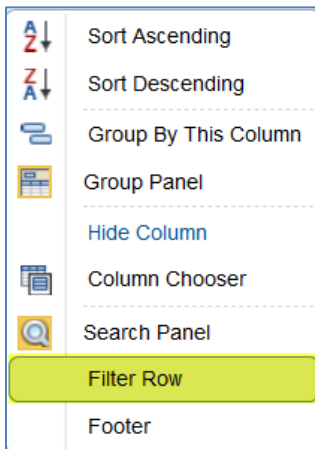
- Select the filtering tool on the column heading.
- Specify your criteria and click **OK**. You can apply filters to as many columns as you wish. For unfiltered results, click the **Select All** checkbox.
- Click the **Clear Filter** icon to remove the filters.

PDF	HTML	XML	PDF	CSV
Page size: 50 Page 1 of 59 (2917 items) 1 2 3 4 5 6 7 ... 57 58 Clear Filter				

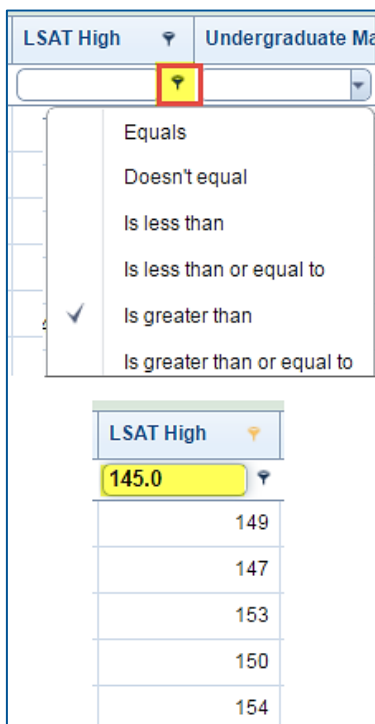
Filter Row Data

In addition to the column header filter, you can apply a filter to each row by using Filter Row. When Filter Row is activated, either enter data within each cell or select a value from a drop-down menu. You can apply additional filtering based on fields within your grid results.










1. To apply a row filter, right-click on any column header and select **Filter Row**.



2. Choose a filter located in the row, for example, **LSAT High**. Select an operator. Specify a value. The screen will reload, displaying matching records.



3. To quickly remove the row filter, select **Clear Filter**.

			First Name 	City 	Perm. State 	Date of Birth 	LSAT High 
Clear Filter			<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	145.0
>				Chicago	IL	12/06/1987	167

Group Column Data

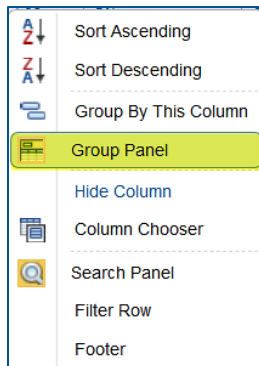
The data in columns may be grouped by a single column. Each group is identified by a group row. Data in the rows that have *identical* values in this column will be arranged into groups. You can group other columns if you want to have multilevel groups based on the values of the additional grouping columns.

There are two ways you can group your data:

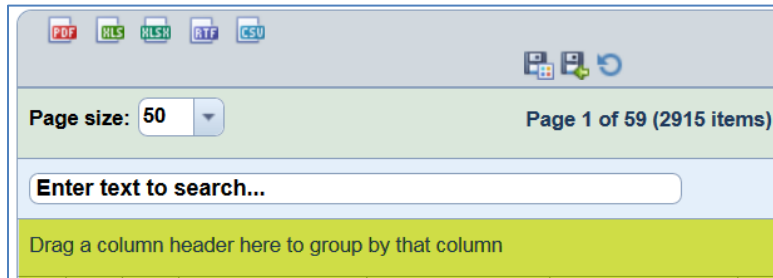
- You can drag a column and place it onto the Group Panel.
- You can choose columns individually.

You can group either prior to searching for prospects or after the prospect search results generate.

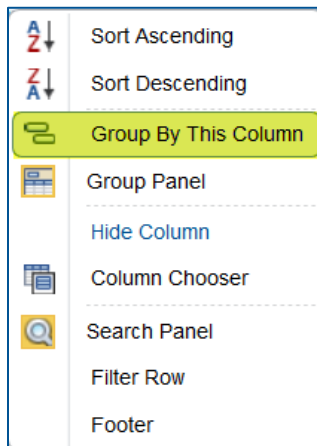
1. To display the Group Panel, right-click on a column header and select **Group Panel**.



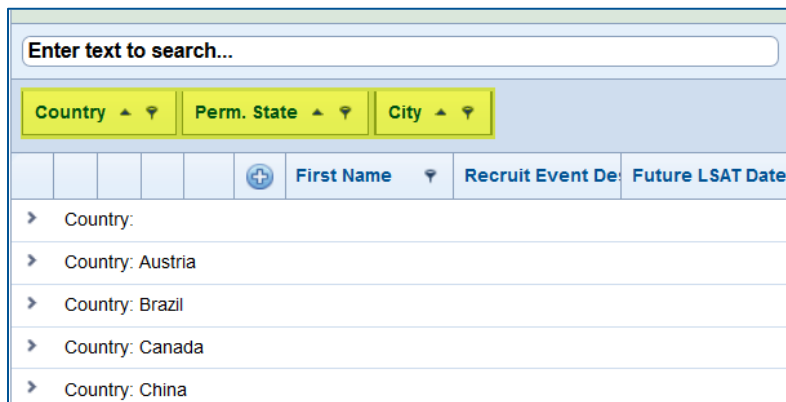
- The Group Panel will appear. It will contain help text to guide you.



- You can either drag a column header to the Group Panel or right-click on an individual column and choose **Group By This Column**.



There are an unlimited number of data groupings you can apply to prospects. The example below shows three groupings: first by country, then by permanent state, and finally by city. The search results will reflect your grouping panel selections.



Managing Groups

You can filter the different levels of a group until you reach the Prospect Overview. You can also use the Fast Edit tool and open a prospect record within the grouping.

1. One option is to expand each grouping manually. Select the down arrow at the top left of the window to filter through the different levels. You can manually collapse each section.

Country	Perm. State	City	First Name	Recruit Event Des	Future LSAT Date	Ethnicity	Term	Year	LSAT High
Country: USA	Perm. State: IL	City: Alsip	Yuri			Caucasian/White		2011	0

Profile | Contact Information | Program | Auditing

Name: Artashkin Yuri
 SSN: 305-34-3366
 LSAC Acct. L30174497
 No:
 Date of Birth: 1/25/1979 12:00:00 AM
 Gender: Male
 Ethnicity: Caucasian/White

2. Another option allows you to expand and collapse the entire search results by right-clicking on the Group Panel and making the appropriate selection.

Country: USA

Expand All
 Collapse All
 Clear Grouping
 Group Panel

3. All records are expanded and an indicator will display if information is continued on the next page.

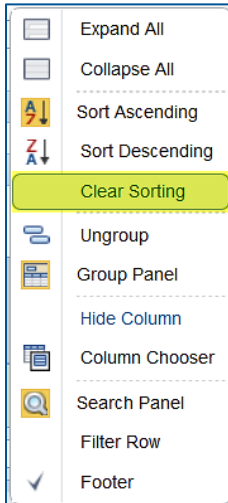
Country: USA (Continued on the next page)

Perm. State: IL (Continued on the next page)

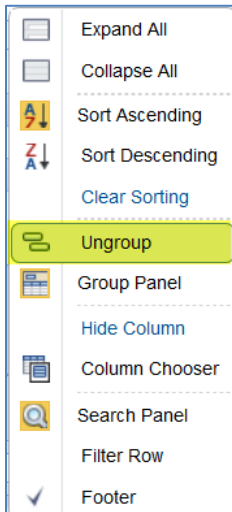
City: Alsip

Yuri

4. You can sort on any groupings in either ascending or descending order by right-clicking on the group and specifying the sort order. To remove the sort order, select **Clear Sorting**.



5. To clear a single group, right-click on the group and select **Ungroup**.



6. To clear all groupings, select **Clear Grouping**.

