

LSAC Unite Essentials

Assigning and Reviewing Files Part III

Updated 5/8/2024

## Exercise 1 - Create a View in My Pending Reviews LLM

**Task:** Organize the *My Pending Reviews* grid and save the view.

**Scenario:** You would like to expedite your review process by evaluating the applications in the order in which they were assigned. Organize a grid and save a view for future reviews.

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 four parts. The first part walks you through how to organize a grid. The second part walks you through how to save a view and set it as a default view. The third part walks you through how to access the view. The fourth part walks you through how to edit a view.

#### Part 1: Organize the grid

1. Click **REVIEWS**. Note if you have a Reviewer only role, you will only have access to the **REVIEWS** tab and so you will not need to click **REVIEWS**.
2. Select or ensure you're on the *My Pending Reviews* tab.
3. Organize the grid.
  - a. Date Assigned column: Show and move to the right of the Last Name, First column.
  - b. Sort the Date Assigned column in descending order.
  - c. Remove the sort order from the Last Name, First column.
4. The Date Assigned column header should show ↓.

## **Part 2: Save a View**

1. Click **My Views**.
2. Click **Create New View**.
3. Enter View Name: **Assigned by Date**.
4. Click the check box **Set as Default View**.
5. Click **Save**.
6. Click **Close**.
7. Click **HOME**.

## **Part 3: Open the View**

1. Click **REVIEWS**.
2. Click the *My Pending Reviews* tab.
3. Notice the **Assigned by Date** view loads instantly on your page. That is because it is a default view.

## **Part 4: Edit a View to remove the default**

1. Click **Assign by Date** view.
2. Click **Update Current View**.
3. Deselect the **Set as Default View** check box.
4. Click **Save**.
5. Click **Close**.