

Unite Education Program v10.0

Job Aid: 5449

Apply Different Edits to a Group of Person Records

In Unite, you can use the inline edit function to apply different edits to a group of person records. Specifically, you can add or update field values; and you can add, update, and delete sub-records on selected person records. Sub-records include addresses, phone numbers, emergency contacts, and groupings. The following table provides a description of the updates you can make using the inline edit function.

Section	Description
Person	If you select <i>Person</i> fields to edit, you can update values for fields in the <i>Biographical, Demographics, Contact Information, and Character and Fitness</i> sections on selected person records.
Address	If you select <i>Address</i> fields to edit, you can update field values for current, permanent, and temporary addresses in the <i>Contact Information</i> section on selected person records. You can also add and delete address sub-records as needed.
Phone	If you select <i>Phone</i> fields to edit, you can update field values for different phone numbers in the <i>Contact Information</i> section on selected person records. You can also add and delete phone sub-records as needed.
Emergency Contacts	If you select <i>Emergency Contacts</i> fields to edit, you can update field values for contacts in the <i>Emergency Contacts</i> section on selected person records. You can also add and delete contact sub-records as needed.

Section	Description
Academic Summary	If you select <i>Academic Summary</i> fields to edit, you can update values for fields in the <i>Academic Summary</i> section on selected person records; and you can add field values for person records that have no existing values.
Grouping	If you select <i>Grouping</i> fields to edit, you can update field values for groupings in the <i>Source of Data/Groupings</i> section on selected person records. You can also add and delete grouping sub-records as needed.
Fee Waiver	If you select <i>Fee Waiver</i> fields to edit, you can update field values for fee waivers in the <i>Fee Waivers</i> section on selected person records.

When you use the inline edit function, there are several tools that you can use to apply edits efficiently. Like grid functionality throughout Unite, you can sort and filter specific columns. Plus, there is a command bar with functions to control what you see on the grid as well as actions you want to take on selected records.



To apply different edits to a group of person records

1. Open a browser and log on to Unite.
2. On the main menu, click PEOPLE.
3. Find and select the person records you want to update.

Note



You can find person records by performing a search, opening a view on the *Search Results* tab, or checking the *Recents* grid. Next to each person name, there is a check box that you can select.

4. Click **Actions** .

5. Click  .
6. Select **Make individual edits to each selection.**
7. Click  .
8. In the **Available Fields** box, select the check box for the fields you want to update.

Note

For the inline edit function, you can select the check box for a section to include all fields in the section; or you can expand a section and select only the fields you want to update. Some fields are available as read-only to assist with updates you may want to make to other fields.

9. Click  .
10. Click  .
11. For the first section, edit fields for each selected record as needed.

Note

Next to each person name, there is a check box that you can select to apply the same updates to a sub-set of records in the group. Once the sub-set of records are selected, the inline edit commands (Add, Update, Delete) become active for you to use. Available commands may vary depending on the section. For example, you can add and update field values in the *Academic Summary* section; however, you can only update field values in the *Fee Waiver* section.

Note

By default, only active field values are available for selection. If you want inactive field values to be available, select the **Show Inactive filter options** checkbox. Inactive field values remain in Unite for historical purposes and should not be used for forward-looking work.

12. Click **Submit** .
13. Verify your updates. Then click **Confirm** .
14. If you selected fields in more than one section, click the tab for the next section you want to update and repeat steps 10 through 13.

Note

There is a tab for each section that has fields you selected to edit.

15. After you make updates, click **X** to close the *Edit* window.
16. Click **Yes** to confirm.

Related resources

- 5433 - Perform a Person Search
- 5743 - Open a Person Record
- 5448 - Apply the Same Edits to a Group of Person Records