

Unite Education Program v9.0



Job Aid: 5468

Archive a Person Record

You can archive a person when you decide you no longer need to engage with the person through Unite. Data and documents are retained when archiving person records. Archived people and their information are accessible through a search and in reports. Archiving is not a system requirement. However, if you decide to archive, you typically do this at the end of the admission cycle.

If a person you wish to archive has applied for admission, you must close all of their open applications before archiving. To close an application, the application must be in one of the following final statuses: Admitted, Denied, Withdraw during Review, Pending Matriculation, Matriculated, or Application Incomplete. The steps for archiving a person record differ depending on whether you want to archive a single record or archive multiple records.

To archive a single person record

1. Open a browser and log on to Unite.
2. On the main menu, click PEOPLE.
3. Select the Search Criteria tab.
4. Click  to clear the previous search.
5. Specify the search criteria.
6. Click  .
7. In the *Search Results* list, click the name of the person.

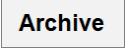

Note

You may need to sort, filter, or increase the items per page to see all records in the grid.

8. Click the person's name.
9. In the person record, verify there are no open applications in the *Applications* section.


Note

You cannot archive a person record if there is an open application. You can either close or delete an open application as needed.

10. Click  on the command bar of the person record.
11. When prompted to archive the application, click  .


Note

The person record has a gray color and Unite appends the header with the word ARCHIVED.

12. Click  to close the person record.



Note

To search for archived people, be sure to select the check box for **Include Archives** before performing your search.

Search results display  indicating the record is archived. You can add the *Archived* column to a grid to determine whether the person is archived.




To archive a group of person records

1. Open a browser and log on to Unite.
2. On the main menu, click PEOPLE.
3. Select the *Search Criteria* tab.

4. Click  to clear the previous search.
5. Specify the search criteria.
6. Click  .
7. In the *Search Results* list, select all records. You can also select the individual check box next to each person for whom you want to archive the person record.

Note

Be sure you select records for people who are in either the Prospect or Matriculant stage. You cannot archive people who are in the Applicant stage.

8. Click  .
9. Select  .
10. When prompted to archive the selected records, click  .