

Unite Education Program v6.5

Job Aid: 5697

## Customize the Profile Summary Fields on Person Records

On each person record, there is a section with read-only fields to provide quick insights about the person. Your school can configure the fields that display – allowing Unite users to quickly see details without having to expand different sections on the person record. Based on the information that is most important, you can add up to 10 read-only fields in two columns. The read-only fields are from expandable and collapsible sections on the person record. Any changes you make apply to all person records and all Unite users for your school.

### To customize summary fields for person records

1. Open a browser and log on to Unite.

#### Note

If this is the first time you are changing the read-only fields, consider taking a screenshot of the summary area first. Once you apply your changes, the summary area cannot be reset to the default layout.

2. Click and expand your username to display the system configuration menu.
3. Click **Global Settings**.
4. Click the *Fields* tab.
5. Click **Person Record/Person Summary**.
6. In the *Available Fields* list, select the check box for each field you want to add to the first column.

#### Note

You can click and expand **Person Record/Person** to see available fields or search for a field by name.

**Note**

You can select up to 10 fields to add to the first column.

**Note**

Select the red X next to the field name to remove a selected field from a column.

7. Click **Add To Column 1**.
8. In the *Available Fields* list, select the check box for each field you want to add to the second column.

**Note**

You can select up to 10 fields to add to the second column.

9. Click **Add To Column 2**.
10. In each column, drag and drop fields in the order you want them to display from top to bottom.
11. If you want to see what the section will look like with your current selections, click **Preview**, and then click **X** to close the *Preview Summary for Person Record / Person* window. Otherwise, skip this step.
12. Once you are satisfied with the configuration, click **Save**.
13. When prompted to save your changes, click **Yes**.
14. Click **X** to close the *LSAC Unite Setup* page.

### **Related resources**

- [5509 - About Person Records](#)
- [5743 - Open a Person Record](#)