

Unite Education Program v6.5

Job Aid: 5698

Customize the Application Summary on Application Records

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

To customize summary fields for application 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/Application 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** or **Person Record/Application** to see available fields or search for a field by name.




Note

You can select up to two 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.
9. Click **Add To Column 2** .
10. In the *Available Fields* list, select the check box for each field you want to add to the third column.
11. Click **Add To Column 3** .
12. In the *Available Fields* list, select the check box for each field you want to add to the fourth column.
13. Click **Add To Column 4** .
14. In each column, drag and drop fields in the order you want them to display from top to bottom.
15. 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 / Application* window. Otherwise, skip this step.

16. Once you are satisfied with the configuration, click  .
17. When prompted to save your changes, click  .
18. Click  to close the *LSAC Unite Setup* page.

Related resources

- [5700 - Customize Summary Fields for the Application Verification Page](#)