Unite Education Program v10.0
Job Aid: 5743

Open a Person Record

In Unite, each person has a record that contains details to help you manage your relationship. When you first open a person record, the record is locked for editing. This allows you to view details without accidentally changing anything. If you want to change something, you can unlock the record and make edits if you have the proper permissions. The steps for opening a person record differ depending on whether you want to open a record after performing a search, open a record from a saved view, or open a record that you recently opened.

To open a record after performing a search

1. Open a browser and log on to Unite.

2. On the main menu, click PEOPLE.

3. Find and open the person record.

   Note

   You can find person records by performing a search, opening a view on the *Search Results* tab, or checking the *Recents* grid. Each person name is a hyperlink to open the record.

4. If you want to see details for all sections, click **Expand All** . Click **Collapse All** to collapse all sections.

5. If you want to make changes, click **Edit** to unlock the record and make updates. Then click **Save** .

   Note

   There are some changes that you can make, like add a person note or add a person document, that do not require you to unlock the record.

6. Click **X** to close the person record.

To open a record from a saved view

1. Open a browser and log on to Unite.

2. On the main menu, click PEOPLE.

3. Click the *Search Results* tab.

4. Click **My Views** or the name of the default view if there is a default selected.

5. On the drop-down menu, click the name of the view you want to open.

6. Find and open the person record.

7. If you want to see details for all sections, click **Expand All** . Click **Collapse All** to collapse all sections.

8. If you want to make changes, click **Edit** to unlock the record and make updates. Then click **Save** .

   > **Note**
   >
   > There are some changes that you can make, like add a person note or add a person document, that do not require you to unlock the record.

9. Click **X** to close the person record.

To open a record that you recently opened

1. Open a browser and log on to Unite.

2. On the main menu, click PEOPLE.

3. Click the *Recents* tab.

4. Find and open the person record.

> **Note**
>
> You may need to sort, filter, or increase the items per page to find the person record.

5. If you want to see details for all sections, click **Expand All** . Click **Collapse All** to collapse all sections.

6. If you want to make changes, click **Edit** to unlock the record and make updates. Then click **Save** .

> **Note**
>
> There are some changes that you can make, like add a person note or add a person document, that do not require you to unlock the record.

7. Click **X** to close the person record.

Related resources

- 5510 – About Person Searches

- 5387 – About Views

- 5433 – Perform a Person Search