Unite Education Program v10.0
Job Aid: 5750

Set the Default View for Person and Application Records

If there is a particular way you like to work with information on a person or application record, you can organize the expandable and collapsible sections and then save the view so the records display details that are most important to you by default. Specifically, you can arrange the order of the sections and expand only the sections with details you want to be able to see. The default view is specific to your user account.

To set the default view for person and application records

1. Open a browser and log on to Unite.

2. On the main menu, click PEOPLE.

3. Find and open a 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.

Note

   If you want to set the default view for application records, be sure to open a person record with an open or closed application.

4. Click **Expand All** to view person and application details in all sections.

5. When you are ready to design the default view, click **Collapse All** to view only the header for each section.

6. Drag and drop person detail sections in the default order you want them to display.

7. Drag and drop application detail sections in the default order you want them to display.

8. Click $\vee$ to expand any detail section you want expanded by default.

> **Note**
>
> Click $\wedge$ to collapse a section.

9. Once you finish designing the default view, click **Set as Default View** .

> **Note**
>
> The default view is specific to your user account. You can update the view at any time if your needs change.

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

Related resources

- 5433 – Perform a Person Search

- 5743 – Open a Person Record