

Unite Education Program v10.0

Job Aid: 5448

## Apply the Same Edits to a Group of Person Records

In Unite, you can use the batch edit function to add or update field values on a group of person records if the edits you want to make are the same for all records. The following table provides a description of the updates you can make using the batch edit function.

Section	Description
Contact Note	If you select <i>Contact Note</i> fields to edit, you can add a contact note to the <i>Contact Log</i> tab in the <i>Activities</i> area on selected person records.
Grouping	If you select <i>Grouping</i> fields to edit, you can add a grouping in the <i>Source of Data/Groupings</i> section on selected person records.
Interest	If you select <i>Interest</i> fields to edit, you can add areas of interest to the following sub-sections in the <i>Interests</i> section on selected person records: <i>JD Coursework</i> , <i>Interested States/Provinces</i> , <i>Interested Programs</i> , <i>Joint Programs</i> , and <i>LLM Areas of Interest</i> .
Person Note	If you select <i>Person Note</i> fields to edit, you can add a person note in the <i>Person Notes</i> section on selected person records.
Prospect Program	If you select <i>Prospect Program</i> fields to edit, you can add or update values for the following fields in the <i>Prospect Level Information</i> section on selected person records: <b>Program Term</b> , <b>Expected Entry Year</b> , and <b>Program Degree</b> .

The batch edit function is only available for adding and updating field values. If you want to delete a field value, you can edit individual person records as needed. You may also be able to

use the inline edit function if you want to delete an address, phone number, emergency contact, or grouping from a group of person records.

### To apply the same edits to a group of person records

1. Open a browser and log on to Unite.
2. On the main menu, click PEOPLE.
3. Find and select the person records you want to update.

#### Note

You can find person records by performing a search, opening a view on the *Search Results* tab, or checking the *Recents* grid. Next to each person name, there is a check box that you can select.

4. At the bottom of the grid, click **Actions** .
5. Click **Edit** .
6. Verify **Apply the same edit to all selections** is selected.
7. Click **Continue** .
8. In the **Available Fields** box, select the check box for each section that has fields you want to edit.

#### Note

For the batch edit function, you cannot select individual fields to edit. You must select the entire section.

9. Click **Add** .
10. Click **Continue** .
11. For the first section, edit fields as needed.

12. Click **Submit** .

13. Verify your updates. Then click **Confirm** .

14. Repeat steps 11 through 13 for each section you selected.

### **Related resources**

- 5433 - Perform a Person Search
- 5743 - Open a Person Record
- 5449 - Apply Different Edits to a Group of Person Records