

Unite Education Program v9.0

Job Aid: 5714

## Edit a View

Any time after you add a view to a grid, you can edit the view. You may want to show a new column or apply an additional filter. Views are specific to your user account and just for you to see unless you choose to share a view with a team member. If a view has been shared, only the user who created it can edit it. Other users can create a new view based on the shared view and then modify the copied version. The steps to edit a view differ depending on whether you want to edit a view for a grid in the admissions area of Unite or edit a view for a grid in the marketing area.

### To edit a view for an admissions grid

1. Open a browser and log on to Unite.
2. Navigate to the grid that has the view you want to edit.

#### Note

Admissions grids are in the PEOPLE, APPLICATIONS, REVIEWS, REPORTS, and UTILITIES areas of Unite.

3. Click **My Views**.

#### Note

If you specified a default view for a grid, instead of seeing **My Views**, look for the name of the view.

4. Click the view you want to edit.
5. Organize the grid in the way you want to see the data.

**Note**

You may need to sort, filter, or increase the items per page to see all records in the grid.

6. Click the view name.
7. Click **Update Current View**.
8. If desired, enter a new view name in the **View Name** text box.

**Note**

Adding a new name only changes the name of the existing view; it does not add a new view.


9. If you want to make the view the default view, click the check box for **Set as Default View**.
10. Click **Save**.

**To edit a view for a marketing grid**


1. Open a browser and log on to Unite.
2. Navigate to the grid that has the view you want to edit.
3. Next to the view name, click  , and then select the view you want to edit. If the grid defaults to the view you want to edit, skip this step.
4. Organize the grid in the way you want to see data.

**Note**

You may need to sort, filter, or increase the items per page to see all records in the grid.

5. On the command bar, click  **Create view** .


**Note**

If  **Create view** is not available on the command bar, click  to see more commands.

6. Next to **Create View**, click  .

**Note**

Be sure you do not click **Create View**. Otherwise, Unite prompts you to add a new view instead of editing the current view.

7. Click **Save changes to current view**.
8. If Unite displays a notification that filters are in place in the view, click  .

**Related resources**

- 5387 - About Views
- 5713 - Add a View to a Grid
- 5328 - Share a Marketing View