

Unite Education Program v1

Job Aid: Del1


10/13/2023

Delete Application Data Elements

In Unite, you can batch delete specific elements of an application such as field values and/or documents. Applications must be closed to batch delete application data. You cannot perform a batch deletion if an application is open. When you delete, you are purging – all information is removed permanently from Unite.

The Super User role is the only role with permission to perform a batch deletion. If you need to grant permission for batch deletion to other roles or users, the user permission is found under People/ Actions-Delete.

To locate applications for deletion

1. Open a browser and log on to Unite.
2. On the main menu, click **APPLICATIONS**.
3. Select the *Closed Year-20yy* tab.
4. Notice the **Program Year** column is filtered by default. If you need to change the year, locate the **Program Year** column header in the grid.
5. Click the vertical ellipsis  and select **Filter**.
6. Select the year and click **Filter**.
 - a. Apply additional filters if needed.

To delete application data

1. Click either the main checkbox to select all applications or click individual checkboxes of the applications you want to delete.
2. Click **Actions**.

3. Click **Delete**.
4. Notice the following:
 - a. The number of applications selected
 - b. The name of the applicants
 - c. The year term and application type
5. The Select Data Elements to Delete radio button is selected by default
 - a. 5,000 is the maximum number of applications on which you can do a partial deletion
6. Click **Continue**.
7. Select the elements by clicking the checkbox within the Available Fields area. You can choose either entire sections or individual fields.
 - a. Use **Search available** text box to enter a keyword to locate specific items
8. Click **Add**.
9. If you would like to save your selections for future use, enter a name in the **Saved Selections** menu. Press Enter on your device to save.
10. Click **Continue**.
11. A verification window appears displaying a list of the items you are deleting as well as the number of items. You can increase the number of items up to 250 per page.
12. Click **Submit**.
13. Click **Yes**.
14. Click **X** to close.
15. Click **Yes**.

Application sections and data that can be deleted

Here is a list of the section's available fields you can delete.

1. **Application**
 - a. Financial Aid

- b. Notes
 - c. Recommendations
 - d. Scholarships
- 2. **Application UDFs** – expand to view and select your school’s user defined fields (if applicable)
- 3. **Documents**
 - a. Eapp
 - b. CAS
 - c. Any other document type your school uploaded in the Application Documents section
- 4. **Review**
 - a. Notes
 - b. Recommendation
 - c. Scholarships
 - d. Scores
- 5. **Review UDFs** – expand to view and select your school’s user defined fields (if applicable)

Related Resources

5630 - Close an Application

5521 - About Starter User Roles

5430 - Configure Permissions for a User Role