

Unite Education Program v1

Job Aid: Del3


11/2/2023

Delete a Person's Full Record

In Unite, you can batch delete a person's full record if the person has no open application associated with their record or the application is no longer active (the application end date is in the past). When you delete, you are purging - the person is gone 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.

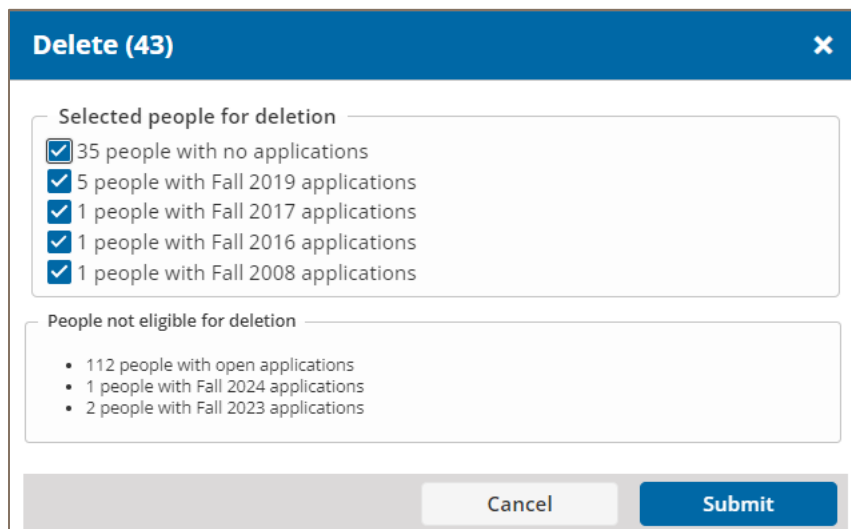
To locate people for record deletion

1. Open a browser and log on to Unite.
2. On the main menu, click **PEOPLE**.
3. Select the *Search Criteria* tab and specify search criteria to find the people.
4. Click **Search**.
 - a. If needed, apply grid filtering by clicking the vertical ellipsis  of any header and select **Filter**.
 - b. Apply the filtering condition and click **Filter**.

To delete full records

1. Click either the main checkbox to select all people or click individual checkboxes of the people whose record you want to delete.
2. Click **Actions**.
3. Click **Delete**.
4. Notice the following:

- a. The number of people selected
 - b. The names of the people
5. Click on **Delete Full Record** radio button.
- a. 10,000 is the maximum number of records that you can delete
6. A window appears that may display the following:
- a. Number of selected people eligible for deletion
 - i. Those with no application
 - ii. Those with a past application and the term and year of that application
 - b. Number of people ineligible for deletion
 - i. Those that have an open application
 - ii. Those who applied during the current application cycle and the JD Matriculation Certification process is still underway. For example, 2023 is the current year until December (after Matriculation time). Then, the current year will switch to 2024. Unite won't let you delete any people with 2023 or beyond apps right now. In December that will change to the new active year - 2024.



The screenshot shows a dialog box titled "Delete (43)" with a close button (X) in the top right corner. The dialog is divided into two sections:

- Selected people for deletion:** This section contains a list of five items, each with a checked checkbox:
 - 35 people with no applications
 - 5 people with Fall 2019 applications
 - 1 people with Fall 2017 applications
 - 1 people with Fall 2016 applications
 - 1 people with Fall 2008 applications
- People not eligible for deletion:** This section contains a list of three items:
 - 112 people with open applications
 - 1 people with Fall 2024 applications
 - 2 people with Fall 2023 applications

At the bottom of the dialog, there are two buttons: "Cancel" and "Submit".

7. Click **Submit**.

8. A window may appear with the warning, “Deleting this person(s) will permanently delete all information in Events and Journey, including email, events, and other communication. You cannot reverse this action. Are you sure you wish to delete this person(s)?”
9. Click **Yes**. Please note that deleting the person is a permanent deletion and irreversible.

Related Resources

5630 - Close an Application

Del1 - Delete Application Data Elements

Del2 - Delete Person Data Elements

5521 - About Starter User Roles

5430 - Configure Permissions for a User Role