

Unite Education Program v1

Job Aid: Del2

11/2/2023

## Delete Person-related Data Elements

In Unite, you can batch delete specific elements of person's record such as field values and/or documents. In addition, you can delete a person's full record. Applications must be closed to batch delete full records. You cannot perform a batch deletion of a person record if the person's application is open. However, you can batch delete person-related elements on both open and closed applications. When you delete, you are purging – all information is removed permanently from Unite. And if deleting a person, 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 partial 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**.
5. If needed, apply grid filtering by clicking the vertical ellipsis  of any header and select **Filter**.
6. Apply the filtering condition and click **Filter**.

### To delete partial records

1. Click either the main checkbox to select all people or click individual checkboxes of the people whose data 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 Select Data Elements to Delete
  - a. 5,000 is the maximum number of records 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 per page on this window up to 250 items.
12. Click **Submit**.
13. Click **Yes**.
14. Click **X** to close.
15. Click **Yes**.

### **Person sections and data that can be deleted**

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

1. **Person**
  - a. Ethnicity
  - b. Notes

- c. SSN/SIN
- d. Special Interests
- 2. **Person UDFs** - expand to view and select your school's user defined fields - if applicable
- 3. **Documents**
  - a. Any document type your school uploaded in the Profile Documents section

### **Related Resources**

5630 - Close an Application

Del1 - Delete Application Data Elements

Del3 - Delete Full Person Record

5521 - About Starter User Roles

5430 - Configure Permissions for a User Role