

How to Delete a Personal Folder

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Overview:

People are central to everything in the Appilistic Database. Almost every other data type (Goals, Attendance, Supports, Outreach, etc.) points to one or more people in the database. To maintain a historically correct database, it is important not to delete people merely because they are no longer affiliated with your facility. Even one such deletion has the potential to damage many historically important attached records. It is far better to hide or deactivate these individuals (see "How to Hide a Personal Folder").

That said, there are times when it is still necessary to delete a personal folder. The existence of duplicate folders is an example. This procedure describes how to consolidate attached records and ultimately delete an unwanted personal folder.

Cautions:

- 1) As a general rule hide, do not delete, people that are no longer active at your facility.
- 2) Make a backup copy of the data file before making significant database changes.

Procedure:

Log In with an Administrator User Name and Password

Open the database

At the **Main Menu**, select **Configuration**,

Then select **Delete a Folder**

This brings you to the: **Delete or Merge Personal Folders and Related Records** panel:

- 1) **Read and follow the Instructions** on this Panel

Show Main Menu

Configuration Panel

Delete a Folder

Help

Delete or Merge Personal Folders and Related Records

Instructions:

- 1) Select the name of the personal folder that you wish to delete on the pull down menu below.
- 2) Note that multiple personal folders can have the same name. In such cases, write down the unique record number of each and determine which version is most easily deleted (has the fewest associated records).
- 3) The Personal Folder Control Panel may take a minute to open as it gathers necessary information. Wireless or busy networks will extend the time required for this process.
- 4) Follow the detailed instructions given on the Personal Folder control panel.

Select Any Personal Folder in the Database: ▼ ?

2) Go to **Select Any Personal Folder in the Database**,

a) Use the pull down menu to select the name you are working on,

You will now be inside the **Personal Folder Deletion Utility**:

A) Instructions
B) Adjust Affiliations
C) Work With Personal Folder Information
D) Work With Associated Records
E) Delete Personal Folder

Follow instructions: ?

Name:

Record Num:

Transfer to ...

Instructions for Deleting a Personal Folder:

- 1) Verify the personal folder to be processed.
- 2) You may select a 'Transfer to' personal folder to which records will be transferred.
- 3) Proceed to tab C where you can individually view, delete or transfer various types of personal folder information:
 - 'View Combined' displays records for both the primary personal folder and the 'transfer to' personal folder.
 - Note that for some types of personal folder information, you will be required to use the delete and replace mode when performing a transfer, so that only one line will result. For other information types, you will be allowed to merge the information of both personal folders.
- 4) Proceed to tab D, where you can individually view, delete or transfer attendance, activities, contacts, education, employment assignments, supports, goals and tags associated with a personal folder:
 - All transfers on tab D are merge transfers.
- 5) If you must completely remove a personal folder, use the 'Delete Personal Folder' button found on tab E:
 - The 'Delete Personal Folder' button will be deactivated until all tab C and tab D record counts are equal to zero.

How to Hide or Retire a Personal Folder

CAUTION: It is generally advisable to hide, rather than delete, any old database records that seem to be cluttering up your database. This will help to maintain the integrity of your database and allow the running of 'historic' reports.

Cancel

- 1) **Tab A):** Before doing anything else, **read and follow the Instructions**. You can also use the “Transfer to . . .” pull down menu to identify the unique Record Numbers associated with each duplicate personal folder that exists for the currently selected individual
- 2) **Tab B)** presents the current affiliations assigned to a personal folder. This information will assist you in deciding which of several duplicate folders to delete, or even if a folder should be deleted at all.
- 3) **Tabs C&D) Work with Personal Folder Information and Associated Records:**
 - a) For now, observe the number of personal folder and associated records attached to each version of the individual’s personal folder. The counts are indicated in blue just prior to each record type.
- 4) Based on the information collected, decide which folder(s) will be deleted and which will be saved.
- 5) Reenter the utility for each folder that you intend to delete.
- 6) **Tab C): Work with Personal Folder Information**
 - a) Select as the “Transfer to . . .” folder the one you have decided to save.
 - b) View combined records to inspect all records under the duplicated name.
 - c) Delete non-unique records attached to the current personal folder.
 - d) Transfer unique records to the personal folder that will be saved.

NOTE: Some data types will require you to use the delete and replace mode when performing a transfer because only one record of the type is allowed in each personal folder. You will be prompted when a mode change is required. To make a change, use the radio buttons found immediately below the “Transfer to . . .” pull down menu on this tab.

- 4) **Tab D) Work with Associated Records**

Work with individual records by viewing, deleting or transferring attendance, activities, contacts, education, employment assignments, supports, goals and tags associated with this folder, ALL transfers on Tab D are merge transfers.
- 5) **Tab E) Delete Personal Folder**
 - a) To completely and permanently delete a folder, use this tab.
 - b) The “Delete Personal Folder” button located on this tab will not work until ALL **Tab C** and **Tab D** record counts equal 0

If further help is required, contact Appilistic.