

Deleting a User

Deleting a user profile is a permanent action, once carried out the user's personal data cannot be retrieved. e.g. Policy acceptance, holidays taken etc

People administrators have the ability to delete user profiles and so should remain vigilant that the deletions taking place are necessary and the user data is ok to be eradicated.

At the point of deletion, all non-personal data can be re-assigned to another user, but all personal data will be deleted (as it cannot be re-assigned)

- Deleting a user individually
- Deleting multiple users at once
- Deleting users en masse via CSV
- If you are using an LDAP sync this will never delete users (only block them)

Deleting a user individually

Navigate to Admin > People

The screenshot shows the 'People Control Panel' interface. At the top, there is a navigation bar with links: HOME, COMPANY, DEPARTMENT (dropdown), FORMS (dropdown), LEARNING, PROJECTS, SUMMER EVENT, BOOK A PERSONALISED DEMO, and LEARN MORE. Below this, the breadcrumb 'Admin / People Control Panel' is visible. The main area has tabs for 'Users', 'Power users', 'Roles', 'Groups', and 'Password policy'. A search bar with a 'Name:' label and a search icon is present. Below the search bar is an alphabetical index from 'All' to 'Z' and a sort option 'First name, Surname'. The main content is a table of users with columns: Photo, Full name, Role, Group, Dummy User Account, Assigned, and Spare. The table lists several users, including Abigail Clark, Alan Metcalfe, Alison Kelly, Amelia Jackson, Anne Wilkins, and Austin Glover. On the right side, there are utility buttons: 'Add a new', 'Export user', and 'Add/update'. Below these are configuration options: 'General con', 'Configure u', and 'Configure S'.

Photo	Full name	Role	Group	Dummy User Account	Assigned	Spare
	Abigail Clark	none	Human Resources, Company, Learning and Development	Yes	Yes	<input type="checkbox"/>
	Alan Metcalfe	none	Sales, Company	Yes	No	<input type="checkbox"/>
	Alison Kelly	none	Human Resources, Company	Yes	Yes	<input type="checkbox"/>
	Amelia Jackson	none	Human Resources, Company	Yes	Yes	<input type="checkbox"/>
	Anne Wilkins	Managers	Professional Services, Company	Yes	No	<input type="checkbox"/>
	Austin Glover	none	Marketing, Company	Yes	Robert Reith	No <input type="checkbox"/>

Checkboxes to the far right of each user row allow for deletions.

Select the checkbox against the user you wish to delete, then click 'delete selected':

The screenshot shows the 'Admin / People Control Panel' interface. At the top, there are navigation tabs for 'Users', 'Power users', 'Roles', 'Groups', and 'Password policy'. Below these is a search bar with the text 'First name:T*' and a search icon. A horizontal menu below the search bar lists letters from A to Z, with 'First name, Surname' as a filter. The main area contains a table of users:

Photo	Full name ▲	Role	Group	Dummy User Account	Assigned	Spare	<input type="checkbox"/>
	T Roy	Administrators, Claromentis	Sales, Company	No		No	<input checked="" type="checkbox"/>
	Tyler Williams	Extranet users (Partner)	none	No		No	<input type="checkbox"/>

On the right side, there are utility buttons: 'Add a new', 'Export user', and 'Add/update'. Below these are configuration options: 'General cor', 'Configure u', and 'Configure S'. At the bottom right, a red button labeled 'Delete selected' is highlighted with a red circle.

On the next screen is a prompt about whether you would like to reassign their non-personal data and if so to whom.

The screenshot shows the 'Admin / People Control Panel / Reassigning user objects' screen. It displays the following information:

Users to delete 1. T Roy (troy)

After deleting, reassign ownership of all non-personal data to this user

Claromentis Administrator

Per-application settings...

Submit

This can be set per application if preferred and a different user entered for each data type.

Admin / People Control Panel / Reassigning user objects

Users to delete 1. Abigail Clark (abigail)

After deleting, reassign ownership of all non-personal data to this user

Claromentis Administrator ▼ Browse

Per-application settings...

You can specify a user account to reassign objects for each of the listed applications. If the field is left empty, these objects will be reassigned to the default user specified above (unless described otherwise).

Object name	Reassign to
Documents and folders	Select user ▼ Browse
Publish pages and folders	Select user ▼ Browse
Org chart positions	Select user ▼ Browse Org chart positions will not be reassigned unless a user is selected here
Calendars	Select user ▼ Browse
Forms	Select user ▼ Browse
Image Gallery	Select user ▼ Browse
Room booking	Select user ▼ Browse
News	Select user ▼ Browse

Submit

Any element not listed here is classed as personal data and therefore will not be re-assigned as it will be permanently removed.

- 'Forms' reflects IC form version ownership, not IC data.
- InfoCapture form user submissions count as personal data and these cannot be re-assigned.

Please note: Deleting a user permanently removes all data associated with that profile (e.g. holiday taken, policy acceptance, the record of ticket submissions) and this cannot be retrieved. Therefore if you may need personal data for future use, block user profiles instead as they can be easily reinstated.

Once ready click 'submit' to process the deletion.

An on-screen message will appear to confirm the user's removal.

Non personal data that was re-assigned this will now reflect the chosen user instead.

The screenshot shows the Claromentis People Control Panel interface. A green notification banner at the top states "User was deleted successfully". Below the navigation bar, there is a search field and a list of users. The user list table is as follows:

Photo	Full name	Role	Group	Dummy User Account	Assigned	Spare	
	Abigail Clark	Administrators	Company, Human Resources, Learning and Development, Support	Yes	Yes	No	<input type="checkbox"/>

Deleting multiple users at once

Multiple profiles can be deleted at once (rather than individually) using the checkboxes but they will all have the same user(s) chosen for non personal data reassignment together.

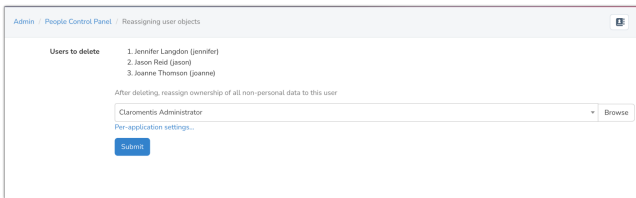
The screenshot shows a table of users with checkboxes for deletion. The table is as follows:

	James Terry	none	Company, Sales	Yes	No	<input type="checkbox"/>
	Jasmine Goreas	Administrators	Sales	No	No	<input type="checkbox"/>
	Jason Reid	none	Company, Marketing, Video Group	Yes	No	<input checked="" type="checkbox"/>
	Jennifer Langdon	Managers	Company, Marketing, Video Group	Yes	Nigel Davies	<input checked="" type="checkbox"/>
	Joanne Thomson	none	Company, Support, Video Group	Yes	No	<input checked="" type="checkbox"/>

1 2 3

Delete selected

Therefore if reassignment should be different across users their deletions will need to be carried out separately so the appropriate individual(s) can be attributed.



Deleting users en masse via CSV

Deletions en masse can be carried out via a CSV import in People.

This does allow for non-personal data re-assignment but only one individual to reassign to can be chosen.

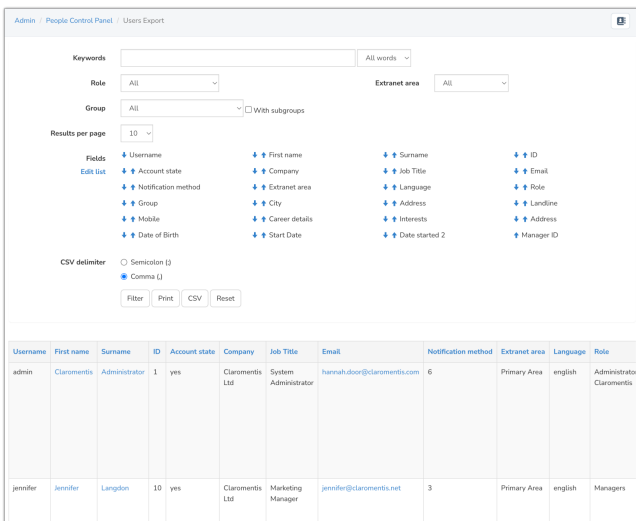
Generally, mass deletions will not be carried out frequently if ever, so we recommend letting us know in a support ticket if you wish to carry this out so we can assist you and ensure it goes smoothly.

Generate a CSV file that includes all users (and their metadata) that you wish to keep.

For every user you wish to delete, leave them out of the CSV.

Full video showing the steps required for deletions via CSV is [here](#).

The easiest way to generate this file is to perform an export of all users or groups from Admin > People > Export alongside all appropriate metadata fields and download this - then simply remove the users you wish to delete from the file so only those you wish to keep remain.

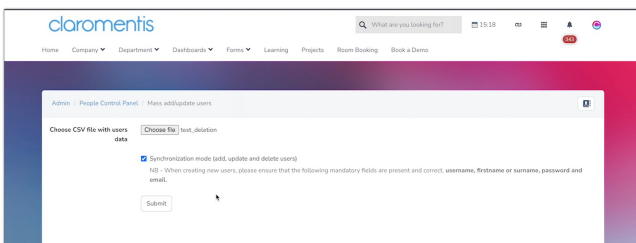


(It is recommended to keep a copy of the original export(s) with all user data in case an issue is encountered when deleting)

Once the file is ready head to Admin > People > Add/Update from CSV

Upload your file and check the box for synchronisation mode.

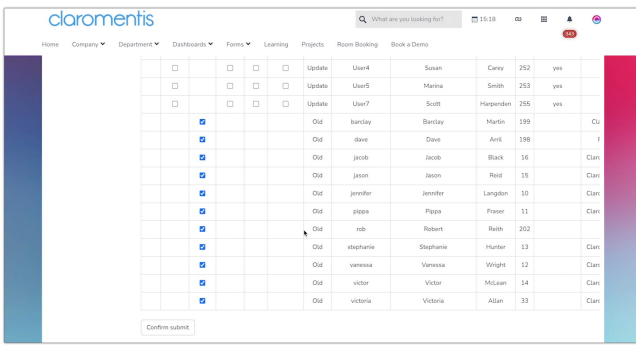
Synchronisation mode should only be used in situations where mass deletions are taking place, as with this enabled the system will copy everything from the CSV imported, deleting all other user profiles and information not included in it.



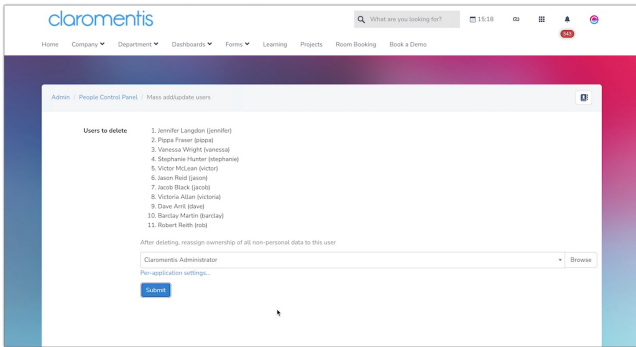
Depending on the size of your user base it is likely that the initial export of all user data and subsequent import to perform mass deletions will require memory limits to be raised on your site for this to be successful, which is also why it is recommended to reach out to us to assist you as attempts to delete may timeout (and fail)

Click 'submit' to run the import and on the next screen the system should have identified all users not included in the CSV and provided a 'delete' option against them.

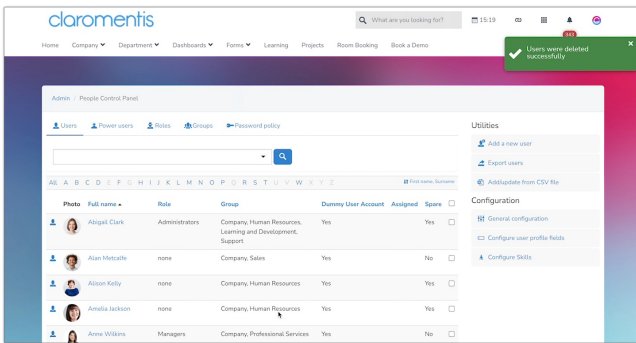
Select the checkboxes for delete (the checkbox at the top under 'delete' will 'select all') scroll down and click 'confirm submit' to continue.



The next screen will ask who to reassign the non-personal user data to.
 Update this user if required and click 'submit' at which point the system will process the deletions.



Once complete the system will show an on-screen message confirming the removals.



If you are using an LDAP sync the system will never delete missing users (only block them)

Sites that have the LDAP tool set up sync changes to user data from Active Directory.

However, removing a user profile from your syncing groups will NOT delete the profile in the Intranet on the next sync.

Instead that user is set to a blocked state and can no longer log in, a user license also becomes available too.

Your team responsible for user management will need to be aware of this and decide to leave the profiles blocked (as they can simply be reactivated again later by adding the user back into the sync) or if it's appropriate to delete them manually from Admin > People.

Our guide on [blocked users](#) outlines how to locate and delete these via the same methods explained above.