

Enabling Data Retention Analytic Settings

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Note:

If you want to take advantage of the Data Retention feature, Administrators must first contact Support to enable the feature.

Overview

Users can configure data retention settings on object types that enable users to retain specific fields, formulas, and property information used for analytics when an object is deleted from the system. By default, all relationship data is retained when an object is deleted.

If no data retention settings are configured for an object, all related data, except for relationship data, will be deleted from the system.

User Account Requirements

The user account used to log into Resolver must have Administrator permission to access the **Object Types** section.

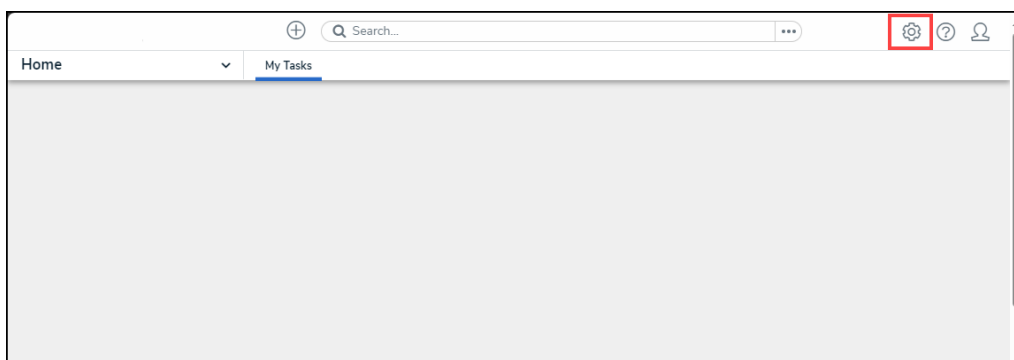
Related Information/Setup

Please refer to the [Enabling the Auto-Delete Function Using a Scheduled Trigger](#) article, for more information on enabling the auto-delete function.

Please refer to the [Disabling the Auto-Delete Function](#) article, for more information on disabling the auto-delete function.

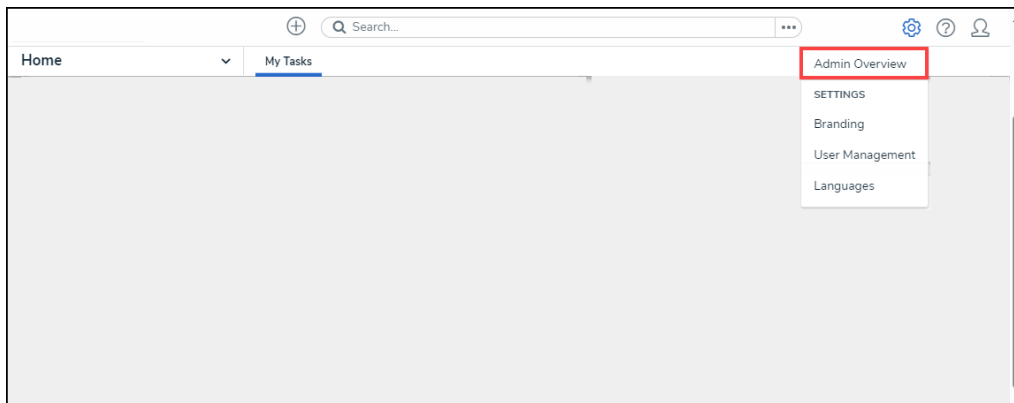
Navigation

1. From the **Home** screen, click on the **Administration** icon.



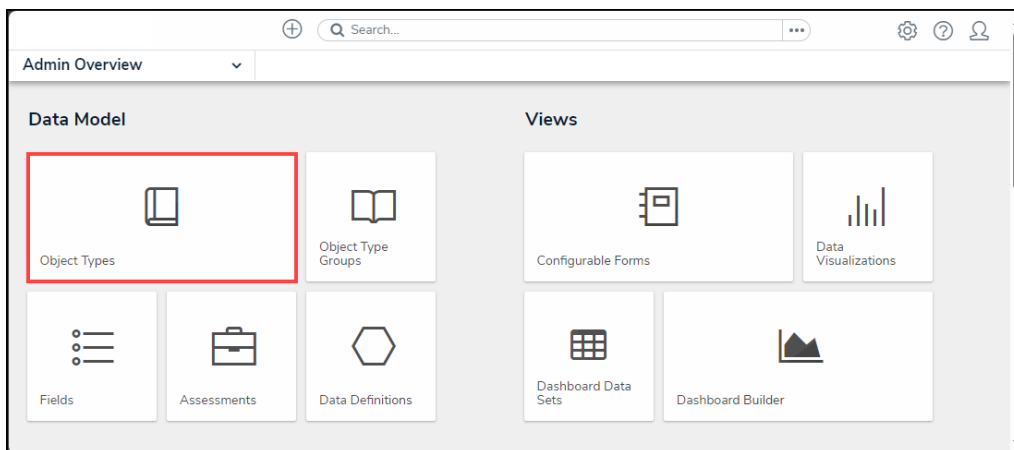
Administration Icon

- From the **Administration Settings** dropdown menu, click the **Admin Overview** link.



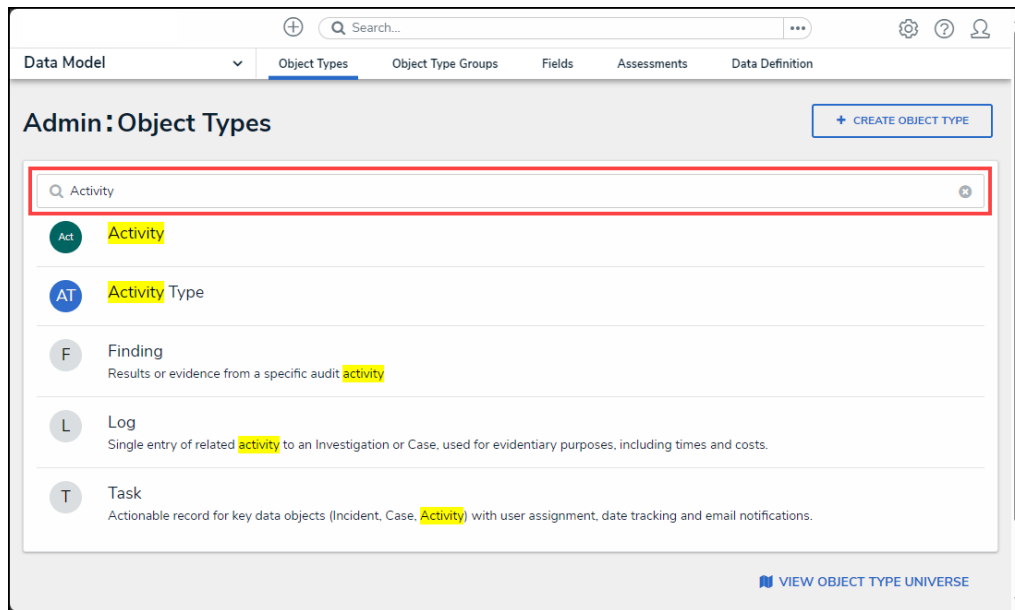
Admin Overview Link

- From the **Admin Overview** screen, click the **Object Type** tile under the **Data Model** section.



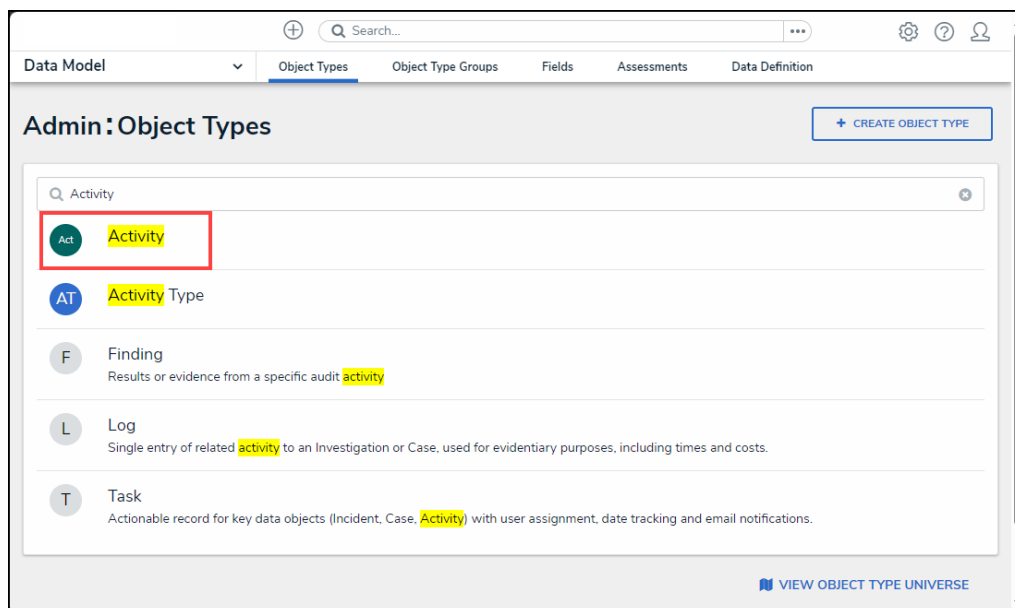
Object Type Tile

- From the **Admin: Object Type** screen, enter an object type name in the **Search** field to narrow the search results.



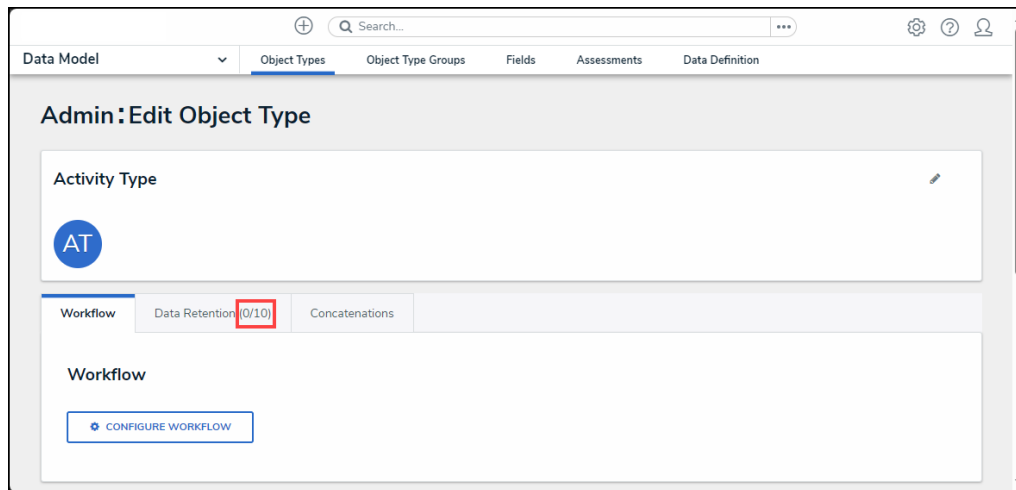
Search Field

- Click on an **Object Type** link.



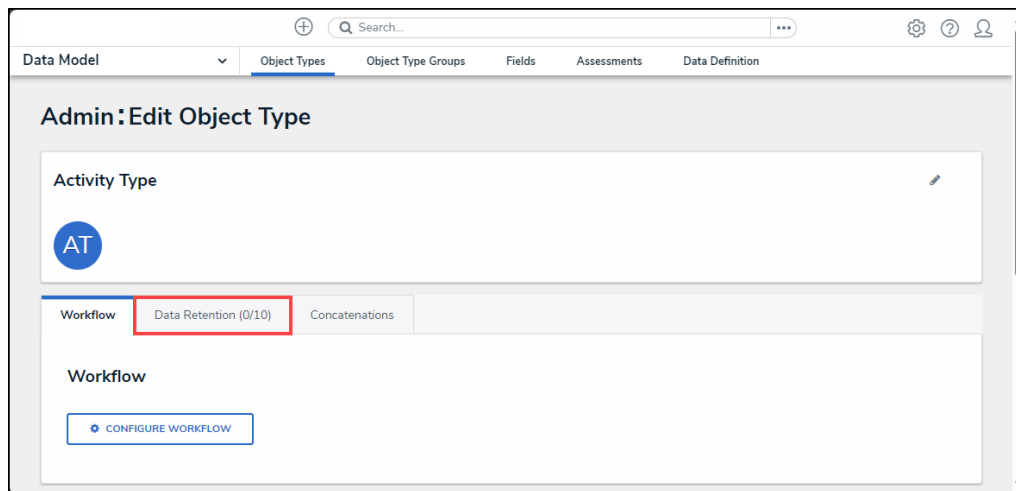
Object Type Link

- From the **Admin: Edit Object Type** screen, the number of active data retention settings selected can be seen within the **Data Retention** tab.



Data Retention Indicator

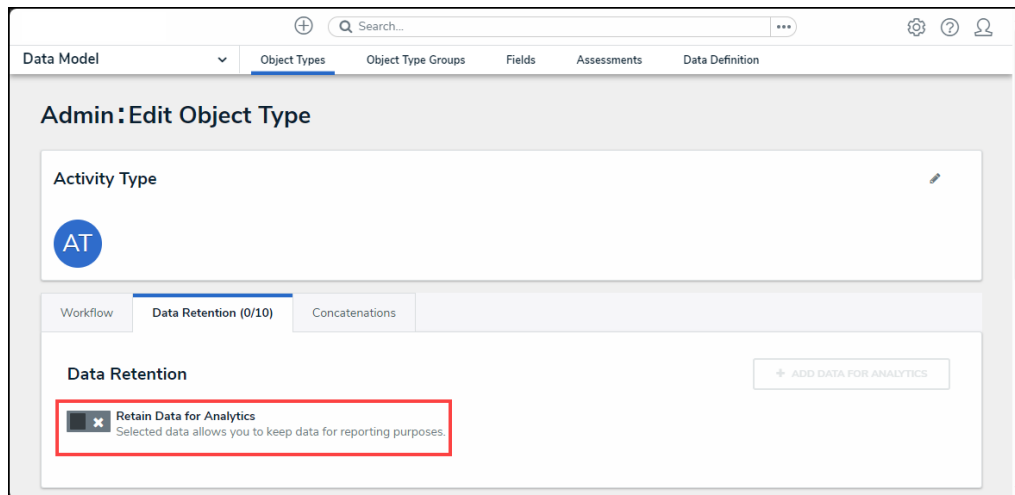
7. Click on the **Data Retention** tab.



Data Retention Tab

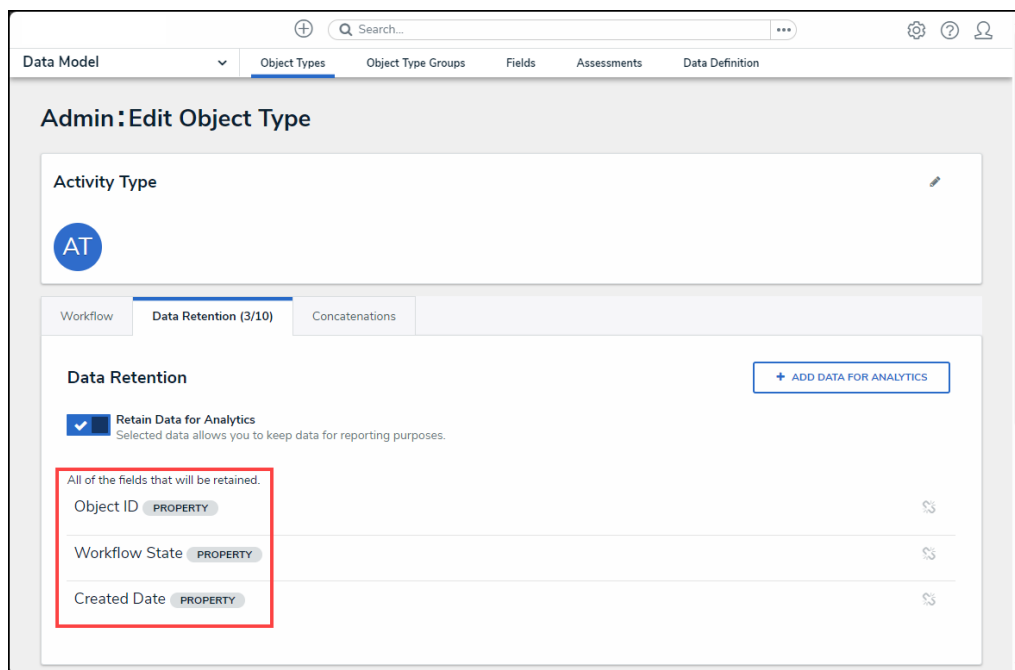
Enabling Data Retention Analytic Settings

1. From the **Data Retention** tab, click the **Retain Data for Analytics** toggle switch.



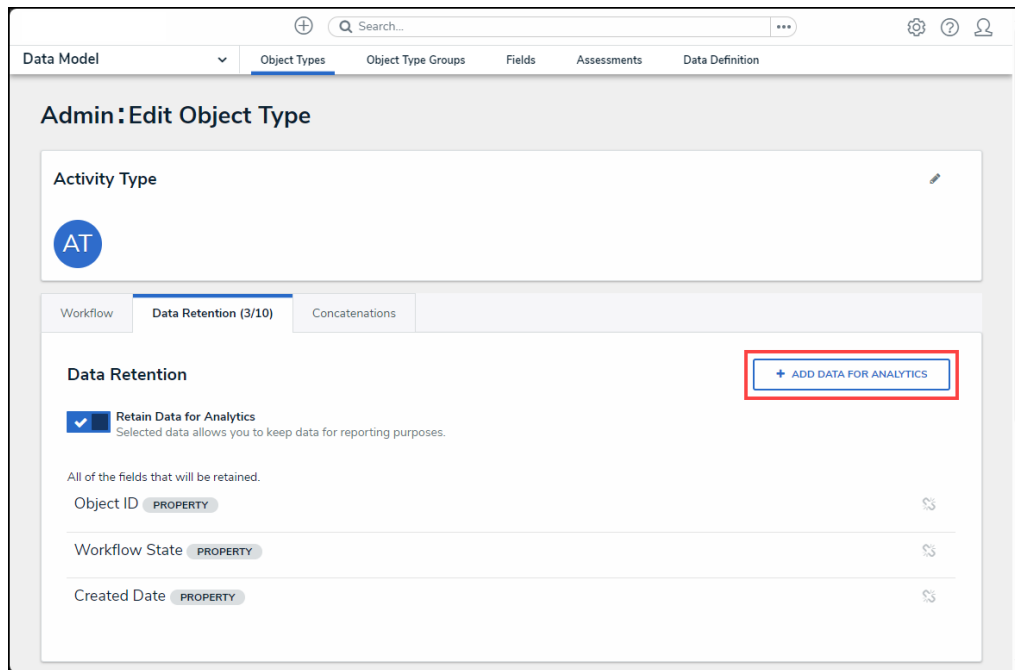
Retain Data for Analytics Toggle Switch

- By default, the **Object ID**, **Workflow State**, and **Created Date** properties are automatically selected. These three properties cannot be removed from the **Data Retention** tab.



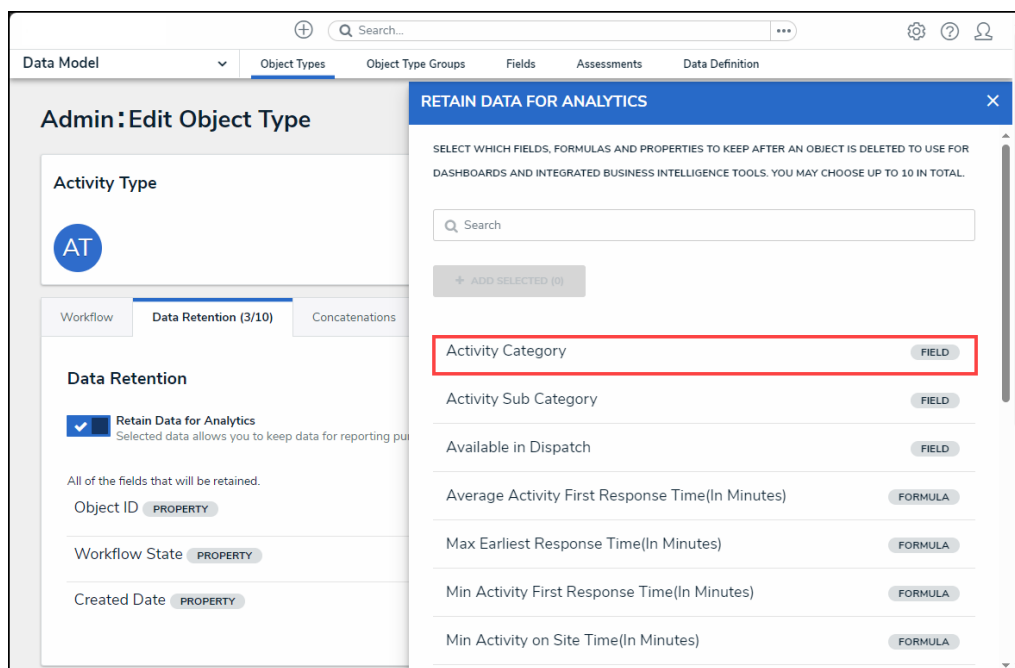
Default Properties

- Click the **+ Add Data for Analytics** button.



+ Add Data for Analytics Button

- From the **Retain Data for Analytics** pop-up, select the data (fields, formulas, and properties) you want to keep for analytics after an object has been deleted from the system, by clicking on a **Field**, **Formula**, or **Property**. A total of 10 fields, formulas, or properties can be selected for an object type. This includes the three default properties.



Data Link





Note:

Only Single Select, Date and Numeric field, formula, and relationship types will appear on the Retain Data for Analytics pop-up

5. **(Optional)** Narrow the list by entering a keyword in the **Search** field.

The screenshot shows the 'Admin:Edit Object Type' interface for 'Activity Type'. The 'Data Retention' tab is active, showing a list of fields and formulas to be retained. The 'Retain Data for Analytics' pop-up is open, displaying a search field with 'Max' entered. The pop-up lists several fields and formulas for selection, including 'Max Earliest Response Time(In Minutes)', 'Max Activity First Response Time(In Minutes)', and 'Max Activity on Site Time(In Minutes)'.

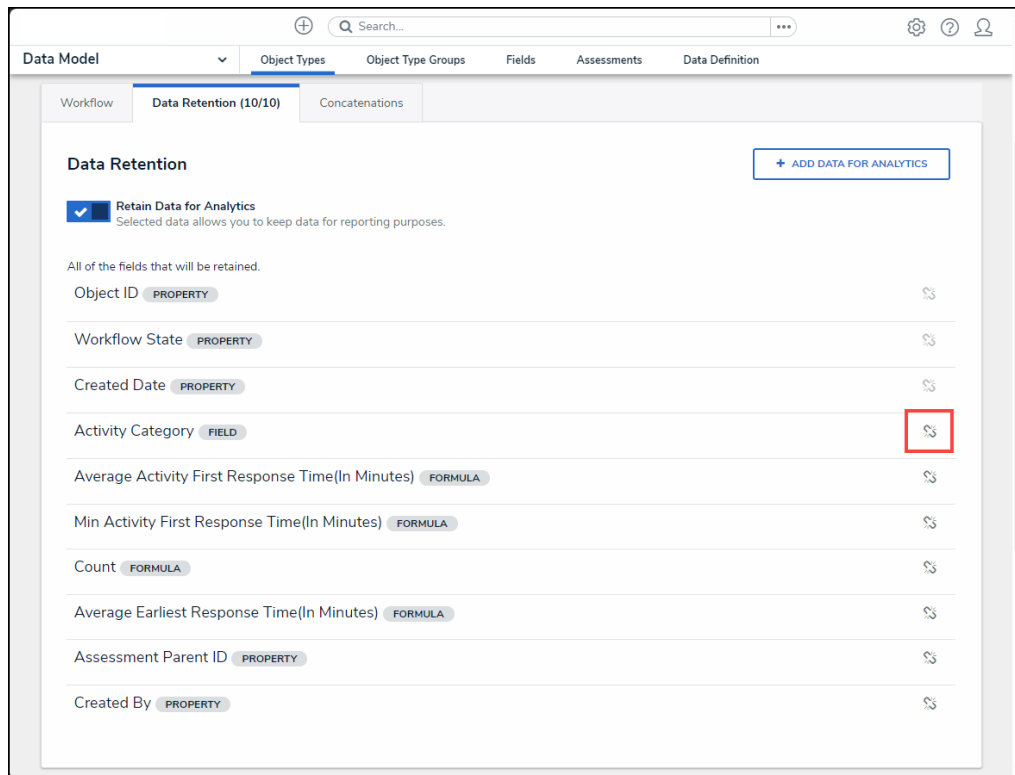
Search Field

6. When you have selected all the data you want to retain, click the **+ Add Selected** button to add the data to the **Data Retention** tab.

The screenshot shows the 'Admin:Edit Object Type' interface for 'Activity Type'. The 'Data Retention' tab is active, showing a list of fields and formulas to be retained. The 'Retain Data for Analytics' pop-up is open, displaying a list of fields and formulas for selection. The '+ ADD SELECTED (7)' button is highlighted with a red box, indicating that 7 items have been selected for retention.

+ Add Selected Button

7. **(Optional)** Click the **Unlink** icon to remove a field, formula, or property from the object type. Unlinking a field, formula, or property does not unlink it from the Object Type. It updates the retention rules for this object type on a go-forward basis.



Unlink Icon