

Enabling the Auto-Delete Function Using a Scheduled Trigger

Last Modified on 08/06/2024 11:06 am EDT



Note:

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

Overview

Workflow Deletion allows users to automate the deletion of an object, complying with their organization's data retention policy (e.g., an object is deleted after being held for x number of years). The Data Retention Auto-Delete function auto-deletes objects when a given condition is met. Auto-Delete uses scheduled triggers or consumed orchestration events to transition an object to be deleted. Deleting an object does not delete any relationship data.

When an object is deleted, the audit trail is updated to ensure that only records identified being retained for analytics remain and all other audit events are deleted.



Warning:

When an object is deleted, it no longer exists and cannot be reverted. Specific object data can be retained for analytical purposes and must be setup on the object type.

User Account Requirements

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

Related Information/Setup

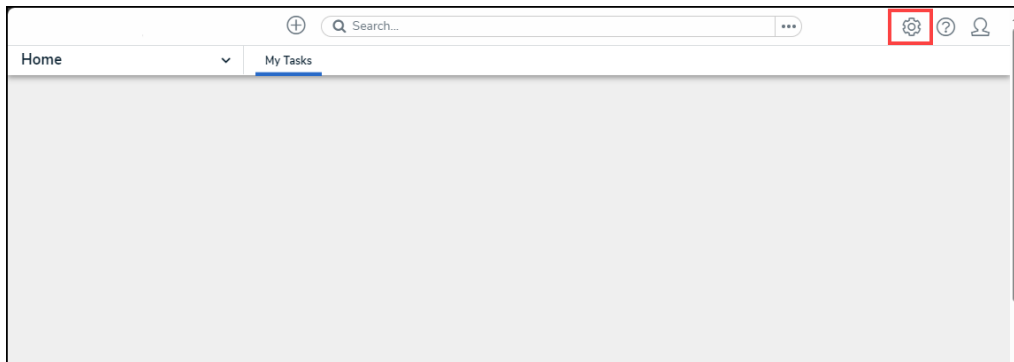
Please refer to the [Disabling the Auto-Delete Function](#) article, for more information on disabling the auto-delete function.

Please refer to the [Enabling Data Retention Analytic Settings](#) article, for more information on configuring data retention settings.

Please refer to the [Add Fields to an Object Type](#) article, for more information on adding a field to an object type.

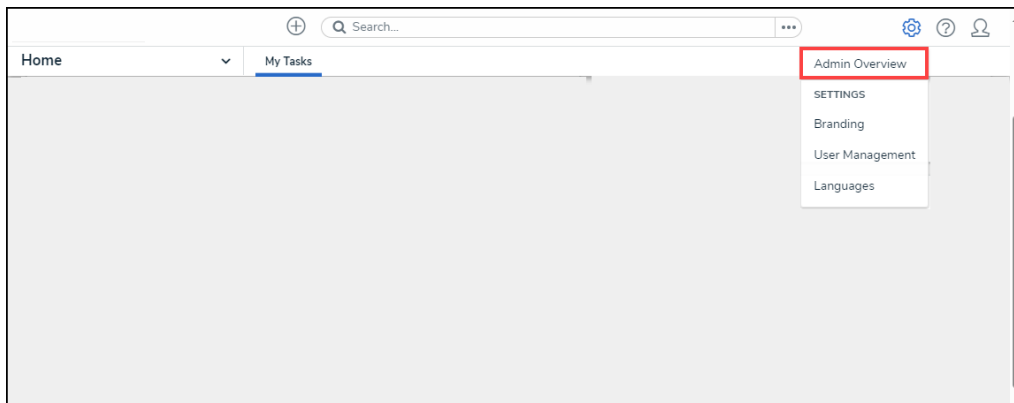
Navigation

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



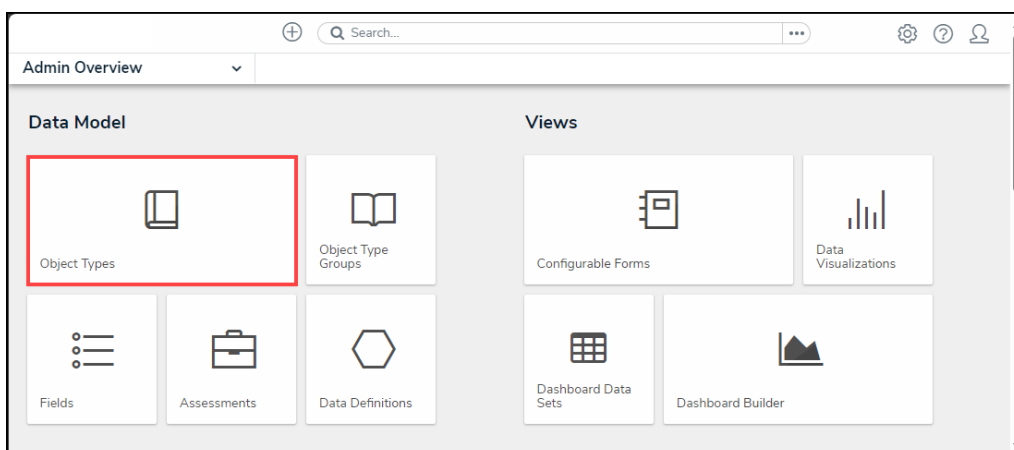
Administration Icon

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



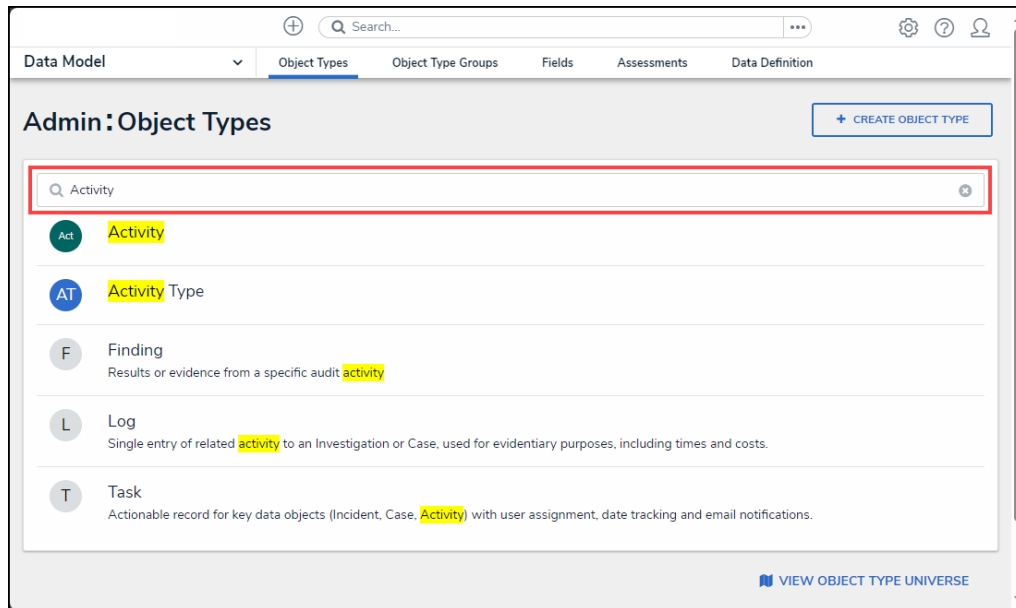
Admin Overview Link

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



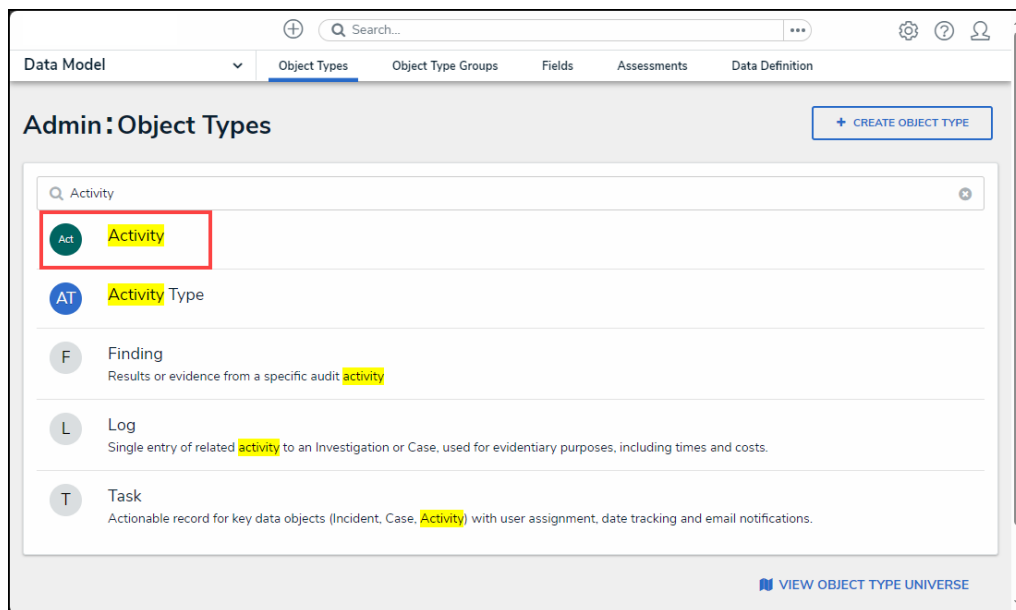
Object Type Tile

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



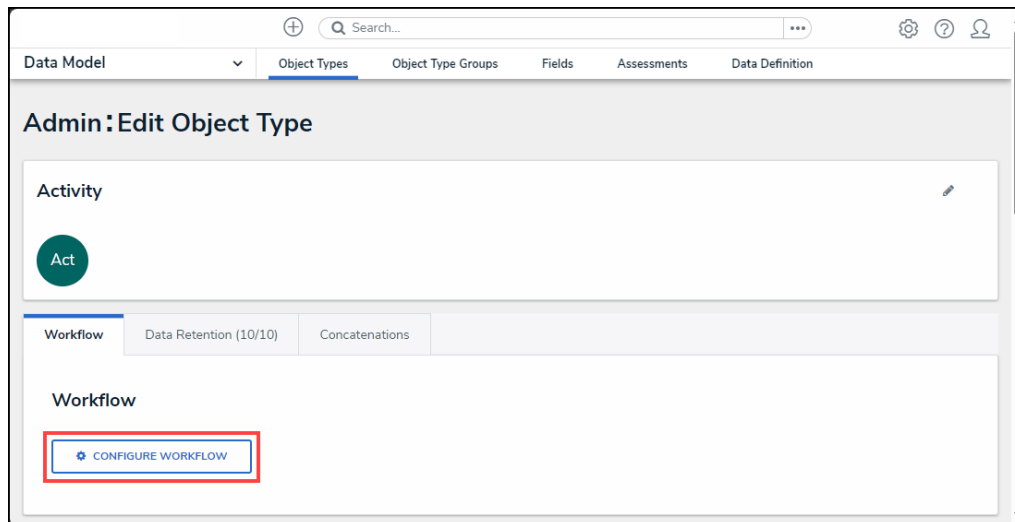
Search Field

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



Object Type Link

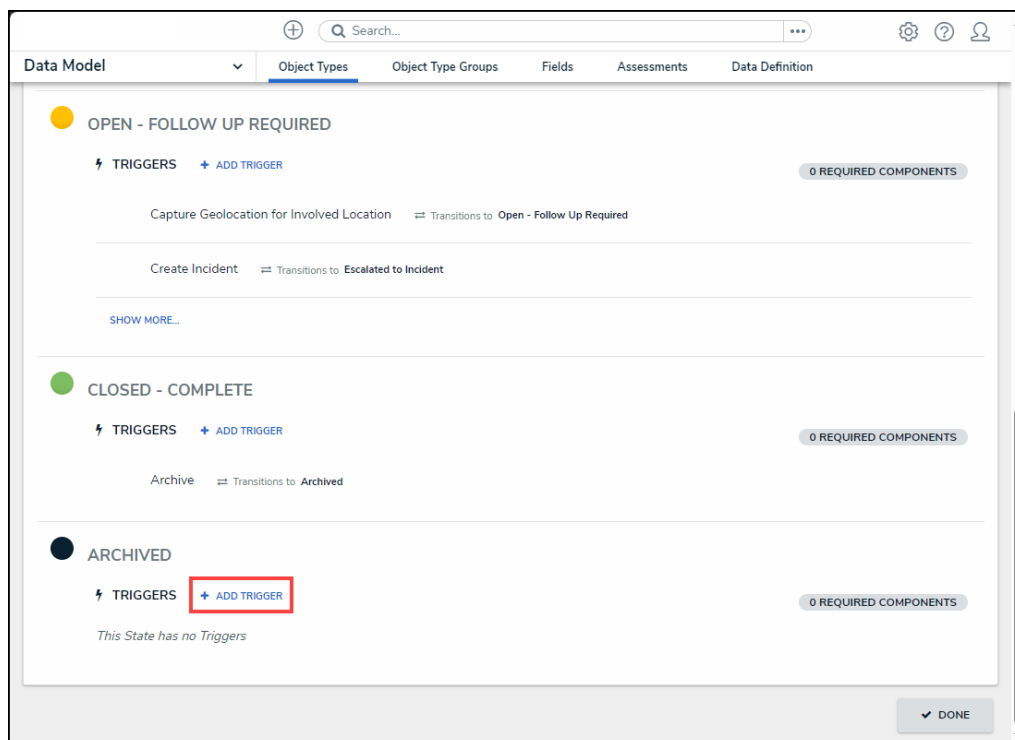
- From the **Admin: Edit Object Type** screen, click on the **Configure Workflow** button under the **Workflow** section.



Configure Workflow Button

Enabling the Auto-Delete Function Using a Scheduled Trigger

1. From the **Admin: Edit Workflow** screen, click the **+ Add Trigger** link under the workflow state where the data retention trigger will be added.



+ Add Trigger Link

2. From the **Add Trigger** pop-up, select **Timed** from the **Type** dropdown menu.

The screenshot shows the 'ADD TRIGGER' modal in the Resolver application. On the left, a sidebar lists workflow states: 'OPEN - FOLLOW UP REQUIRED' (yellow circle), 'CLOSED - COMPLETE' (green circle), and 'ARCHIVED' (black circle). Each state has a 'TRIGGERS' section with an 'ADD TRIGGER' button. The main panel shows the 'ADD TRIGGER' dialog with a 'Type' dropdown menu open. The menu options are 'Button', 'Timed' (highlighted with a red box), and 'Consume Orchestration Event'. Below the dropdown are fields for 'Color' and 'Icon'. At the bottom right are 'CANCEL' and 'CREATE' buttons.

Type Dropdown Menu

3. Enter a trigger name in the **Name** field. The **Name** will appear under the selected workflow state and outlines the trigger's function (e.g., Object Expiration).

This screenshot shows the 'ADD TRIGGER' dialog with the 'Type' dropdown set to 'Timed'. The 'Name' field is highlighted with a red box, indicating where the user should enter a trigger name. Below the 'Name' field is a 'Description' text area. The 'Color' and 'Icon' dropdowns are visible below the description. At the bottom right are 'CANCEL' and 'CREATE' buttons. The background sidebar and workflow states remain the same as in the previous screenshot.

Name Field

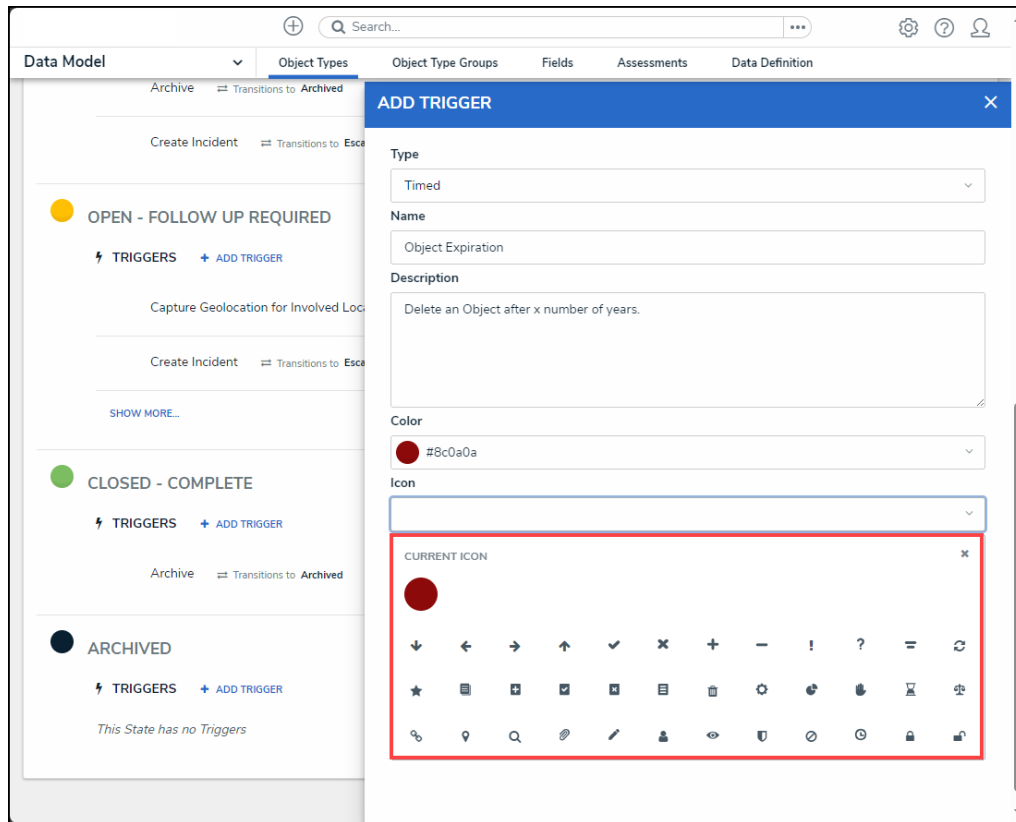
4. Enter a brief description in the **Description** field. The **Description** should outline the trigger's function in further detail.

Description Field

5. **(Optional)** Select a color from the dropdown **Color** palette by clicking on a **Color Swatch**. A colored dot will appear next to the name of the trigger under the selected workflow state.

Color Palette

6. **(Optional)** Select an icon from the **Icon** dropdown menu. The **Icon** will appear next to the name of the trigger under the selected workflow state.



Icon Dropdown Menu

7. Select **Scheduled** from the **Frequency** dropdown menu.

The screenshot shows the 'ADD TRIGGER' dialog box in the Resolver application. The dialog has several fields: Type (Timed), Name (Object Expiration), Description (Delete an Object after x number of years.), Color (#8c0a0a), Icon (EXCLAMATION), and Frequency. The Frequency dropdown menu is open, displaying three options: 'Scheduled', 'Nightly', and 'Scheduled'. The 'Scheduled' option at the bottom is highlighted with a red rectangular box. The background shows the 'Object Types' tab with states like 'OPEN - FOLLOW UP REQUIRED', 'CLOSED - COMPLETE', and 'ARCHIVED'.

Frequency Dropdown Menu

8. Select a date field or formula from the **Date Field/Formula** dropdown menu (e.g., Expiry Date).

This screenshot shows the 'ADD TRIGGER' dialog box with the 'Date Field / Formula' dropdown menu open. The dropdown menu lists five options: 'Expiry Date', 'ACTCOUNT', 'Count', 'Linked Incident Count', and 'Priority'. The 'Expiry Date' option is highlighted with a red rectangular box. The background interface remains the same as the previous screenshot, showing the 'Object Types' tab.

Date Field/Formula Dropdown Menu

- Click the **Create** button to add the trigger.

The screenshot shows the 'ADD TRIGGER' modal in the Resolver application. The modal is open over the 'Object Types' tab. It contains the following fields:

- Type:** Timed
- Name:** Object Expiration
- Description:** Delete an Object after x number of years.
- Color:** #8c0a0a
- Icon:** EXCLAMATION
- Frequency:** Scheduled
- Date Field / Formula:** Expiry Date

The 'CREATE' button is highlighted with a red box.

Create Button

- From the **Edit Trigger** pop-up, click the + **Add Transition** link.

The screenshot shows the 'EDIT TRIGGER' modal in the Resolver application. The modal is open over the 'Object Types' tab. It shows the trigger details for 'Object Expiration' (Delete an Object after x number of years). The 'TRANSITIONS' section is visible, and the '+ ADD TRANSITION' link is highlighted with a red box.

+ Add Transition Link

- Enter a transition name in the **Name** field.

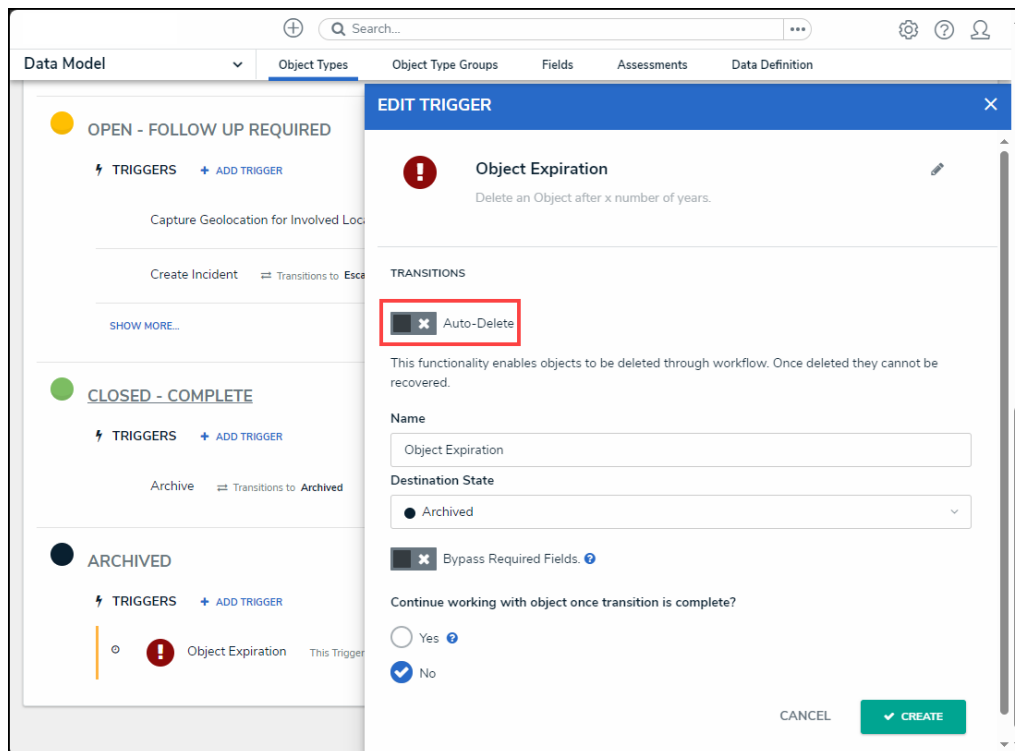
Name Field

- Select an **Archived** state from the **Destination State** dropdown menu.

Destination State Dropdown Menu

- The **Auto-Delete** toggle switch will appear when an **Archived** state is selected from the

Destination State dropdown menu.



Auto-Delete Toggle Switch

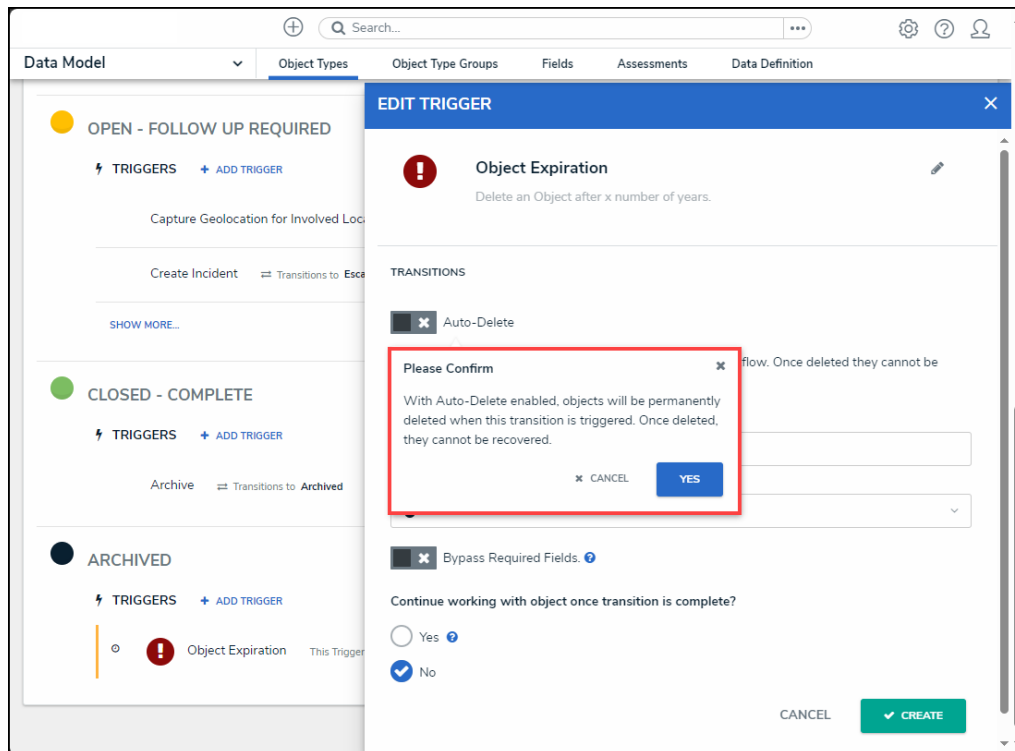
14. Select the **Auto-Delete** toggle switch to enable the auto-delete function through workflows.



Warning:

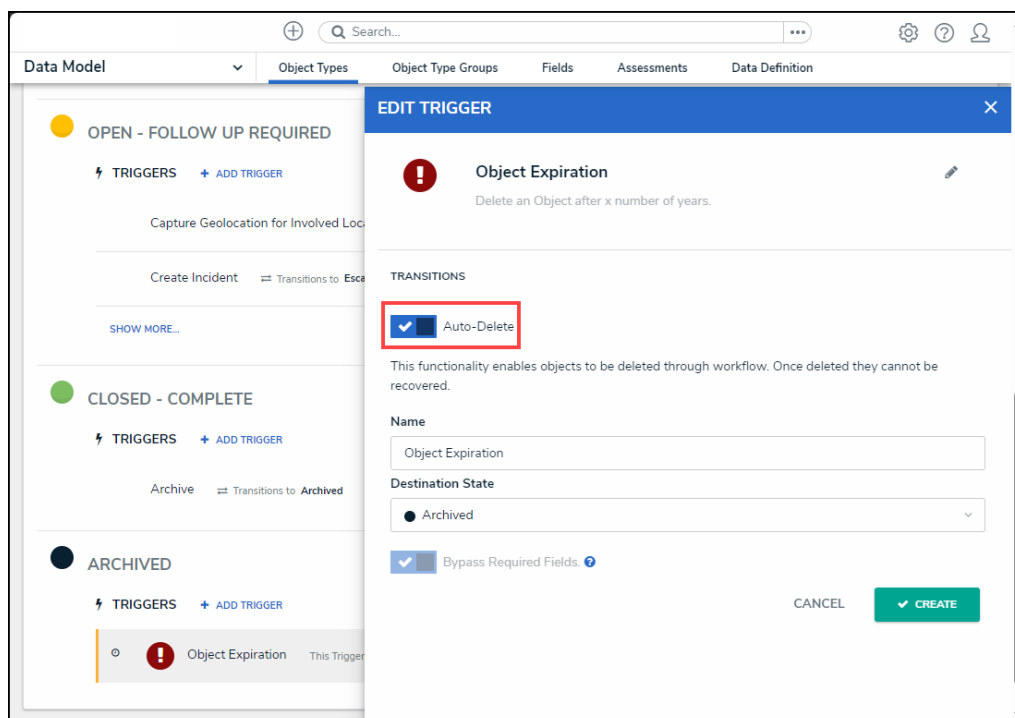
When an object is deleted, it no longer exists and cannot be reverted. Specific object data can be retained for analytical purposes and must be setup on the object type.

15. A **Confirmation** screen will appear, read through the warnings on the **Confirmation** screen and click the **Yes** button to enable the auto-delete function.



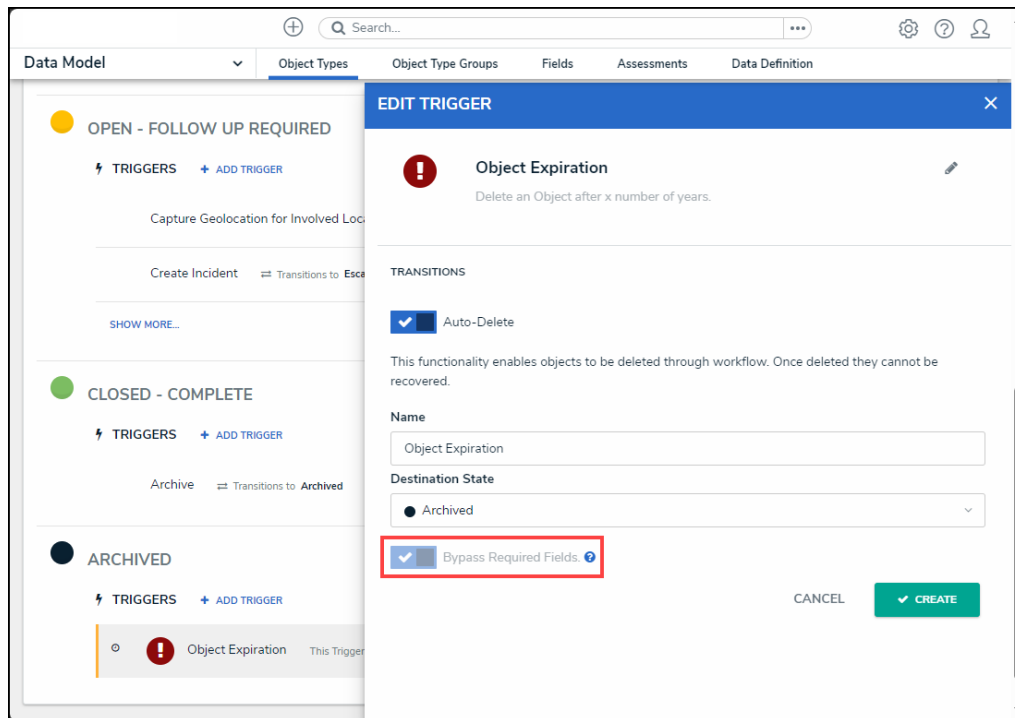
Confirmation Screen

16. The **Auto-Delete** toggle switch will switch to an active state (blue).



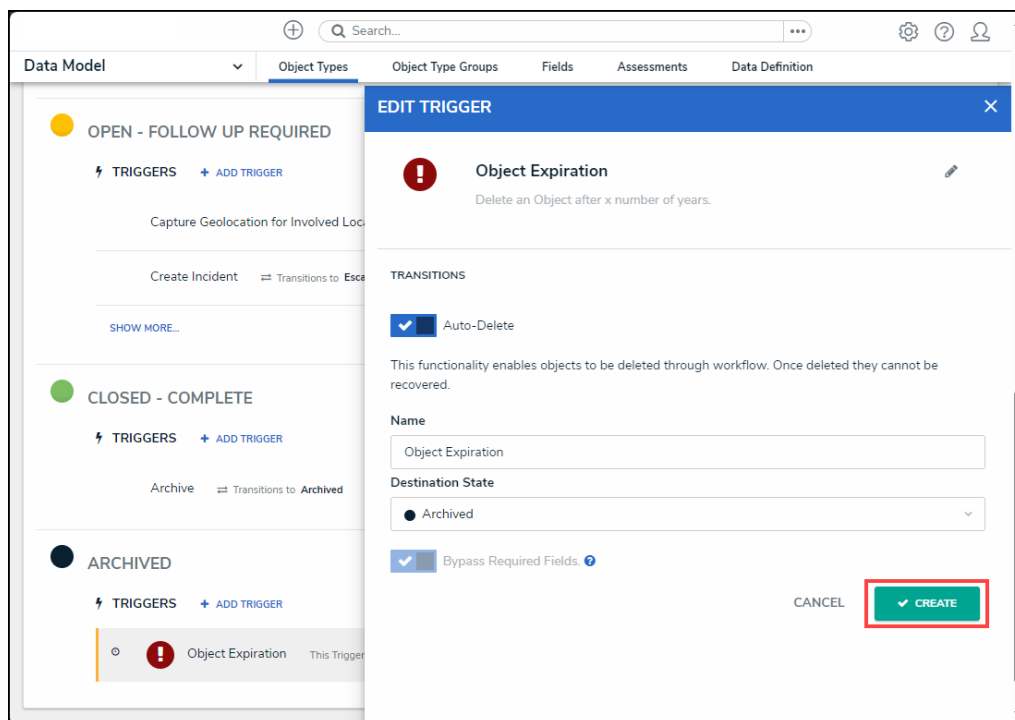
Auto-Delete Toggle Switch - Active

17. The **Bypass Required Fields** toggle switch will automatically switch to active (blue), to allow objects with missing field to still be deleted as part of the scheduled trigger.



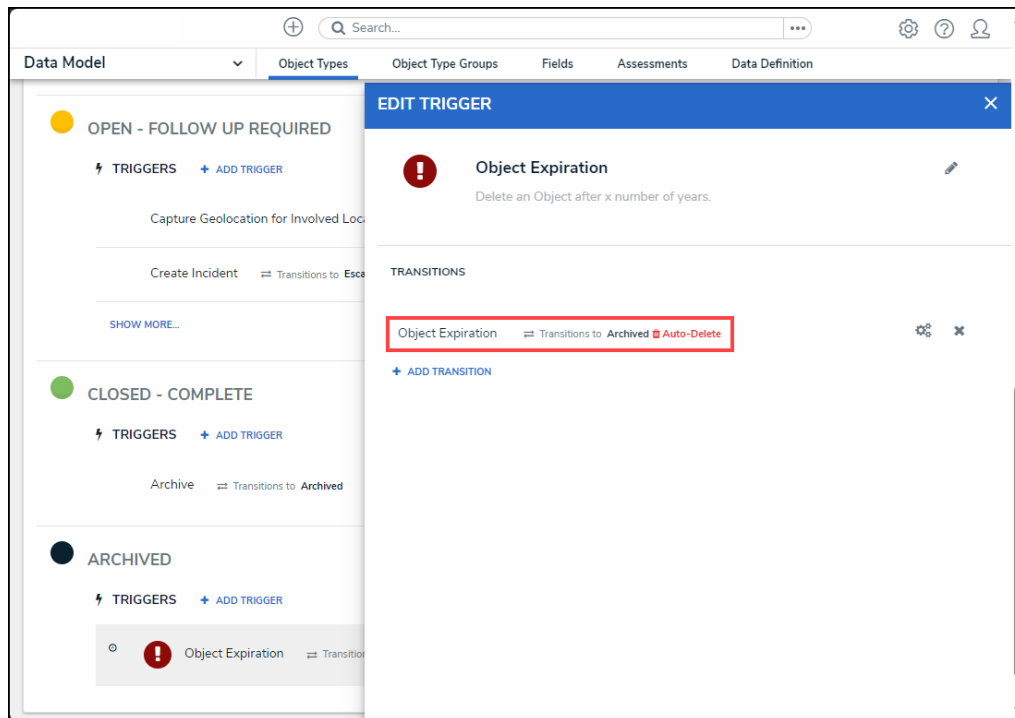
Bypass Required Fields Toggle Switch - Active

18. Click the **Create** button to add the transition to the scheduled trigger.



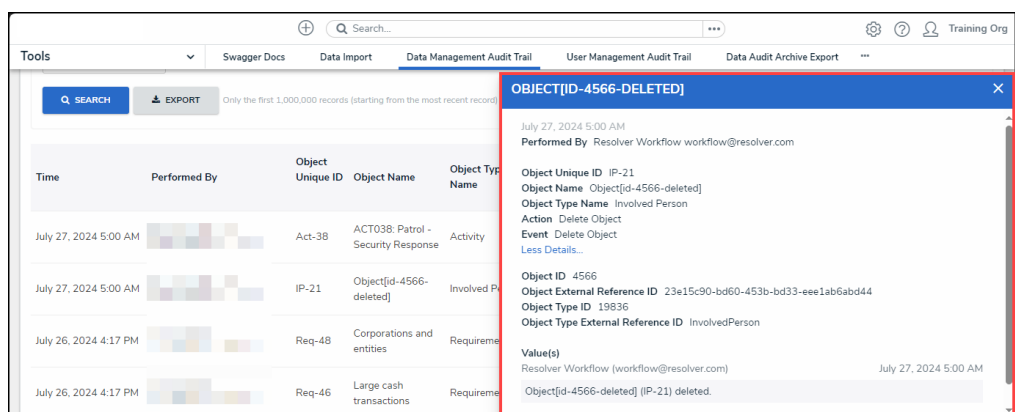
Create Button

19. The **Edit Trigger** pop-up will refresh listing the newly added transition.



Transition

20. When an object is deleted, the audit trail is updated to ensure that only records identified as retainable for analytics remain and all other audit events are deleted.
21. The following occurs in the Audit Trail when an object is deleted:
 - All records are removed except for Create Object records.
 - The deleted object name is redacted.
 - A final Delete Object entry is made with the object name redacted.



Audit Trail Delete Object Entry

22. The following cannot be retained even when using the retain data for analytics function:
 - Description Field
 - Text Fields
 - Multi-Select List Fields
 - URL Attachment Fields

- Image Fields
- Comment Fields