

# **Enabling Data Retention Analytic Settings**

Last Modified on 09/17/2024 2:37 pm EDT

*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.

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Home ~	My Tasks		



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.

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Admin Overview 🗸							
Data Model		v	Views				
Object Types	Object Type Groups		Configurable Forms	2	Data Visualizations		
Fields	Data Definitions		Dashboard Data Sets	Dashboard Builder	<u> </u>		

Object Type Tile

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



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Т	Task Actionable record for key	data objects (Incide	nt, Case, <mark>Activity</mark> ) with us	er assignment	date tracking and	email notifications.			
						NIEW C	BJECT TYPE UNIVERSE		

Search Field

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

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Object Type Link

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



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Workflow	Data Retention	(0/10) Concat	tenations				
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CONFIGUR	RE WORKFLOW						

Data Retention Indicator

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

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Data Retention Tab

### **Enabling Data Retention Analytic Settings**

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



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Selected	data allows yo	u to keep data for re	porting purposes.						
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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.

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Default Properties

3. Click the + Add Data for Analytics button.



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All of the fields that will be retain	ied.						
Object ID PROPERTY							\$3
Workflow State PROPERT	ΓY						\$3
Created Date PROPERTY	)						\$3

+ Add Data for Analytics Button

4. 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.

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Data Model ~ Object Types Object	ype Groups Fields Assessments Data Definition							
Admin: Edit Object Type	RETAIN DATA FOR ANALYTICS	×						
Activity Type	SELECT WHICH FIELDS, FORMULAS AND PROPERTIES TO KEEP AFTER AN OBJECT IS DELETED TO USE FOR DASHBOARDS AND INTEGRATED BUSINESS INTELLIGENCE TOOLS. YOU MAY CHOOSE UP TO 10 IN TOTAL.							
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	+ ADD SELECTED (0)							
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Workflow State PROPERTY	Max Earliest Response Time(In Minutes)	FORMULA						
Created Date PROPERTY	Min Activity First Response Time(In Minutes) Гоямиц							
	Min Activity on Site Time(In Minutes)	FORMULA						





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#### 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.

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Selected of	lata allows you	ı to keep dat	a for reporting pu	Max A	ctivity on	Site Time(In Mii	nutes)	FORMULA
All of the fields that Object ID PR	t will be retaine	ed.						
Workflow Sta	te property	Y						
Created Date	PROPERTY							

Search Field

 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.

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AT	Q Se	earch								
Workflow Data Retention (3/10) Co	rcatenations	ADD SELECTED (7								
	~	Activity Ca	tegory		FIELD					
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Retain Data for Analytics Selected data allows you to keep data for	r reporting pui	ilable in Disp	FIELD							
All of the fields that will be retained. Object ID PROPERTY	*	Average Ad	ctivity First Resp	oonse Time(In Minutes)	FORMULA					
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Created Date PROPERTY	*	✓ Min Activity First Response Time(In Minutes)								
	Min	Activity on S	ite Time(In Min	utes)	FORMULA					

+ 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.

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Average Ea	rliest Response Time	(In Minutes)	FORMULA					S	
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Unlink Icon