

Manually Deleting an Object

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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

When using the Data Retention function, users will have the ability to fully delete (purge) mistakes or test objects within the system without retaining the data that may interfere with analytics data accuracy.

When an object is deleted, it will go into a purge queue. The object is removed from the UI and cannot be reverted.

When an object is deleted, the audit trail is updated to ensure that only records identified as being retained for analytics remain.



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.

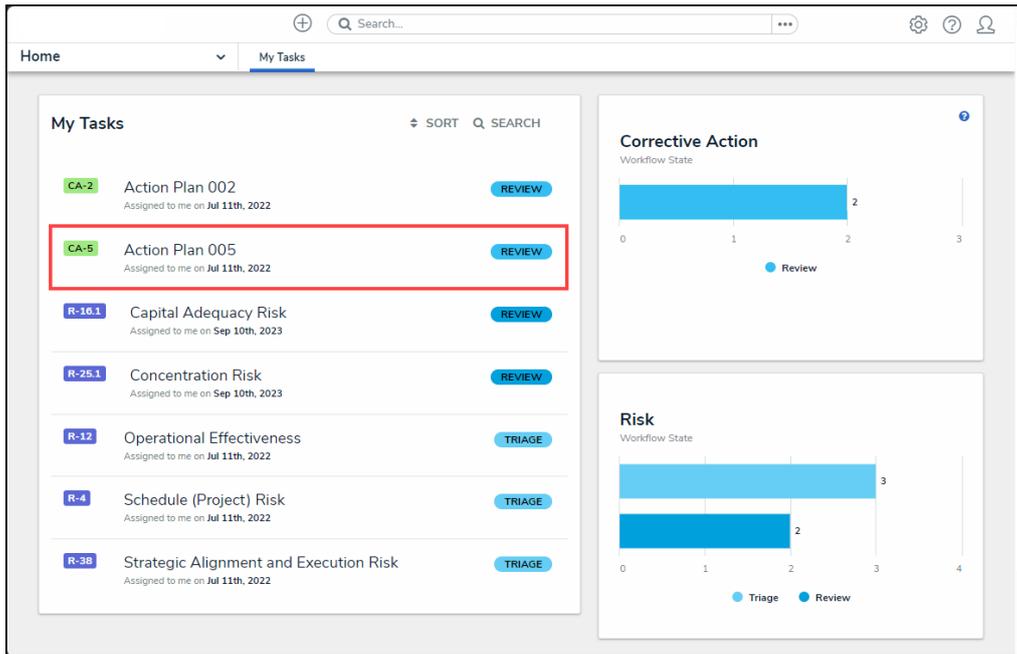
User Account Requirements

A user must be a part of an org that has the Data Retention function activated and object type delete permissions in order to delete an object from the system.

Navigation

There are many ways to access objects within the system. For this illustration, we will be accessing an object through the **My Tasks** section on the **Home** screen.

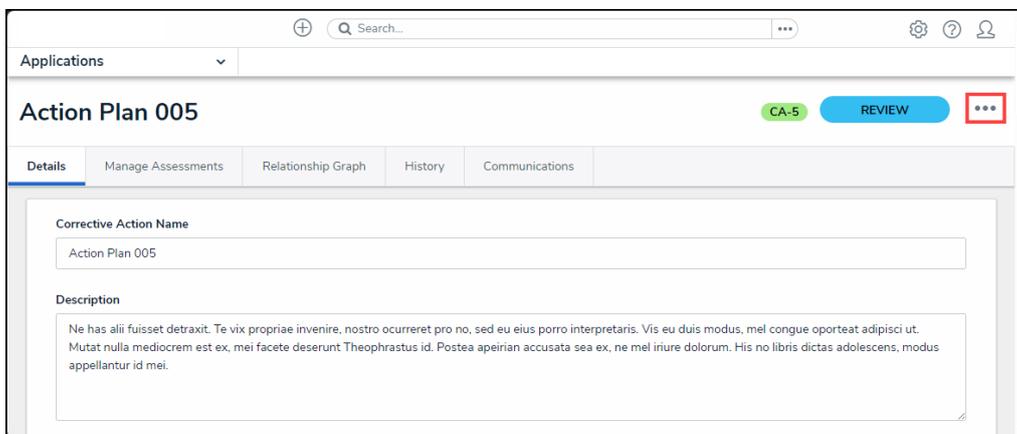
- From the **Home** screen, click on an **Object** on the **My Tasks** section.



Object

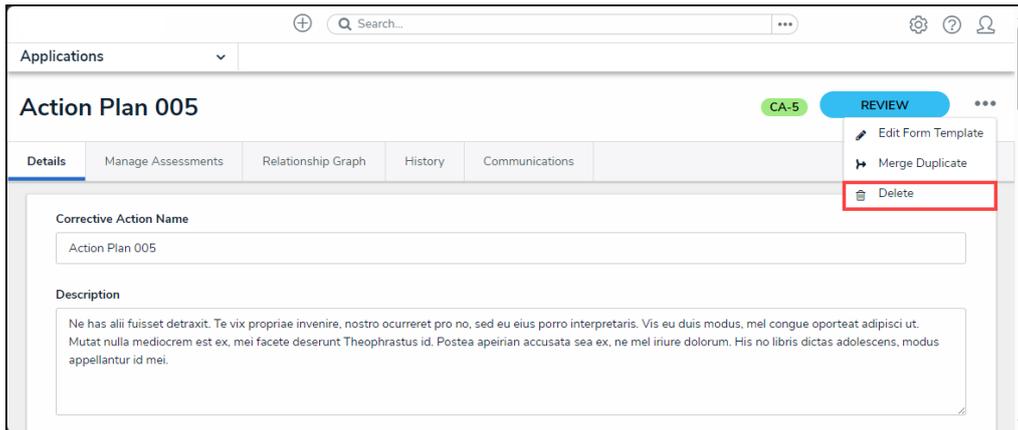
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1. From the **Corrective Action (Object)** screen, click the **More Actions** icon.



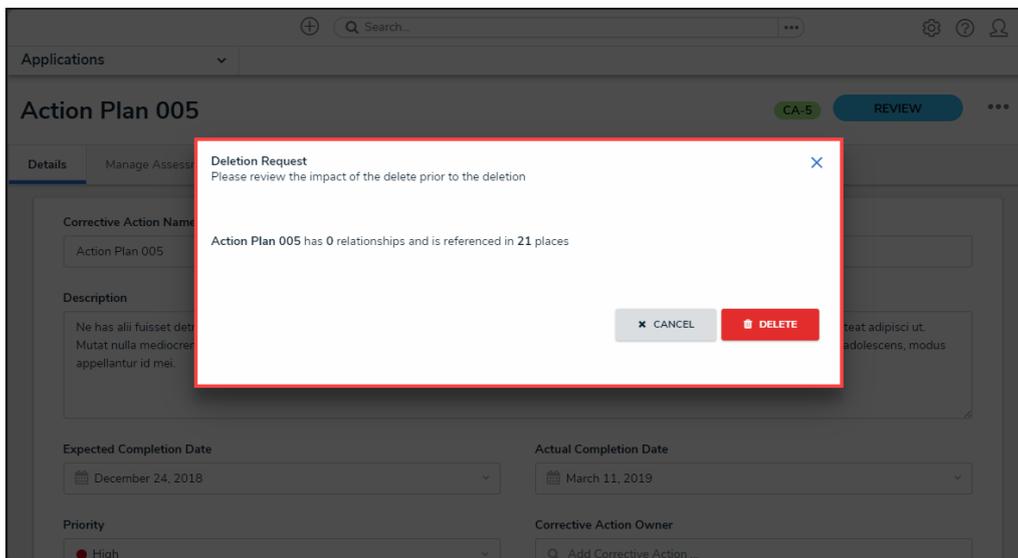
More Actions Icon

2. Select **Delete** from the **More Actions** dropdown menu.



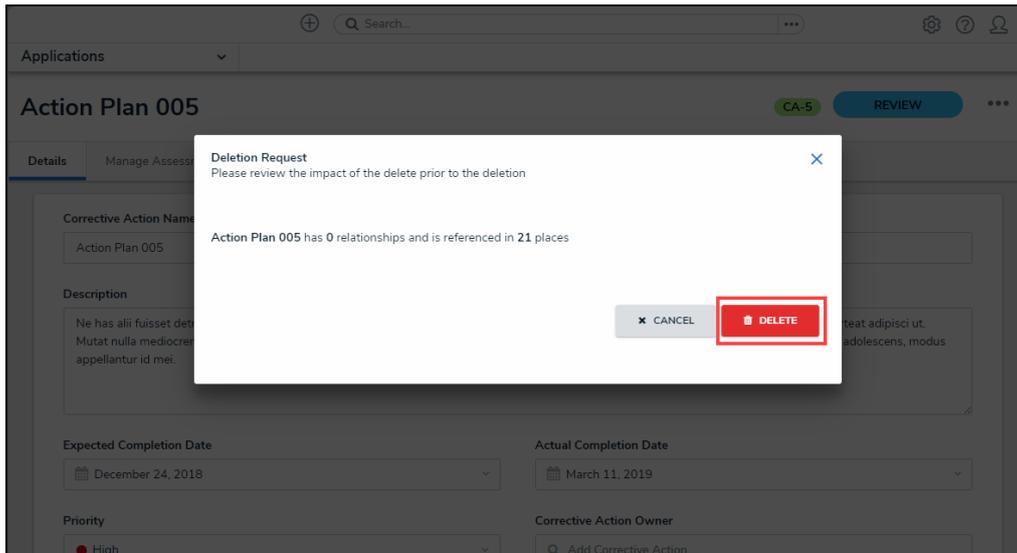
Delete

3. If the **Retain Data for Analytics** toggle switch on the **Data Retention** tab is deactivated for the object type, the following **Confirmation** screen will appear when deleting an object.



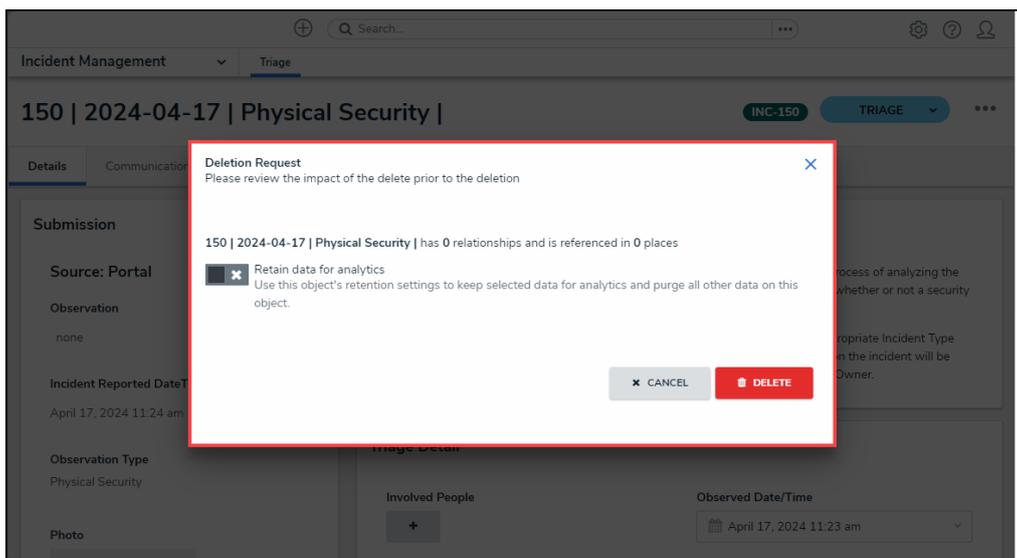
Confirmation Screen

4. Read the warning, as it will outline the number of relationships and references that will be impacted if the object is deleted from the system.
5. Click the **Delete** button. The object will go into a purge queue. The object is removed from the UI and cannot be reverted. It can take up to one week to fully remove the object and related information from the system.



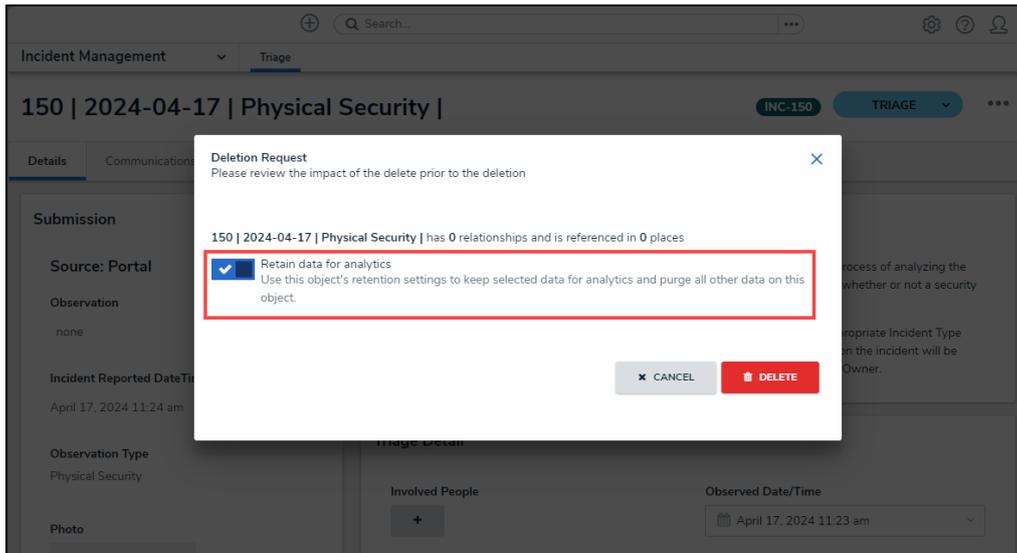
Delete Button

6. If the **Retain Data for Analytics** toggle switch on the **Data Retention** tab is activated for the object type, the following **Confirmation** screen will appear when deleting an object.



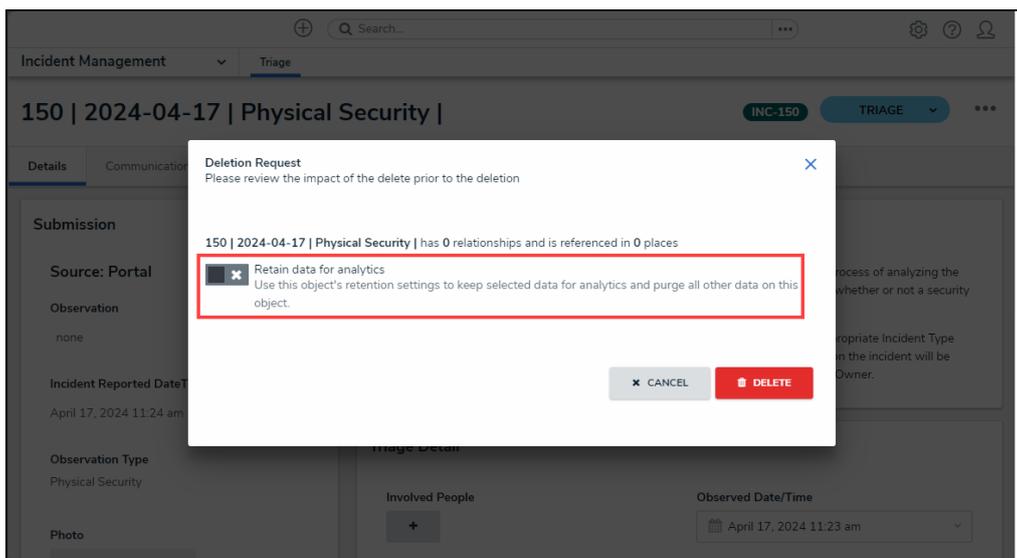
Confirmation Screen

7. Read the warning as it will outline the number of relationships and references that will be impacted if the object is deleted from the system.
8. **(Optional)** Select the **Retain Data for Analytics** toggle switch to retain the information selected on the **Data Retention** tab for the object type and delete all other related data.



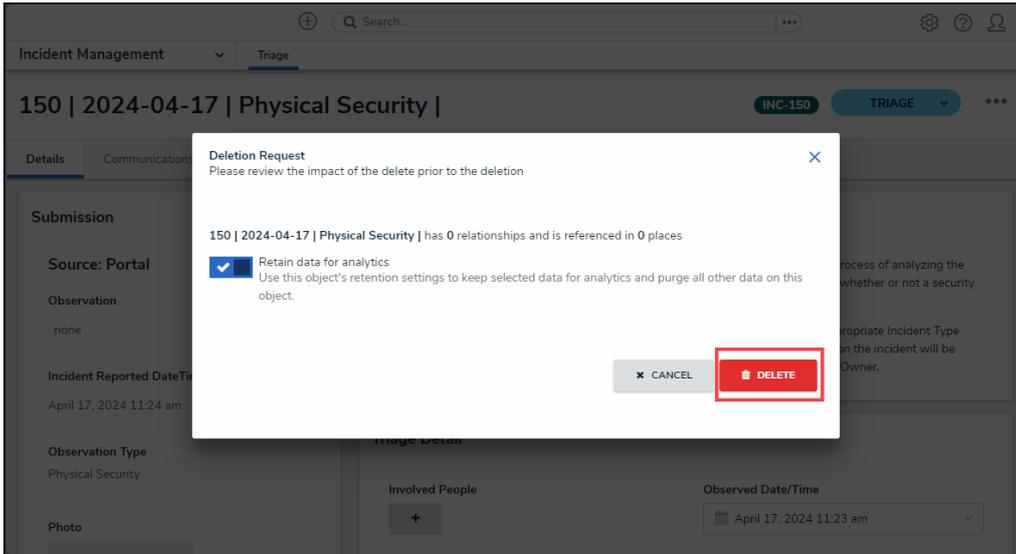
Activated - Retain Data for Analytics Toggle Switch

8. **(Optional)** Leave the **Retain Data for Analytics** toggle switch deactivated to delete the object and all related data from the system.



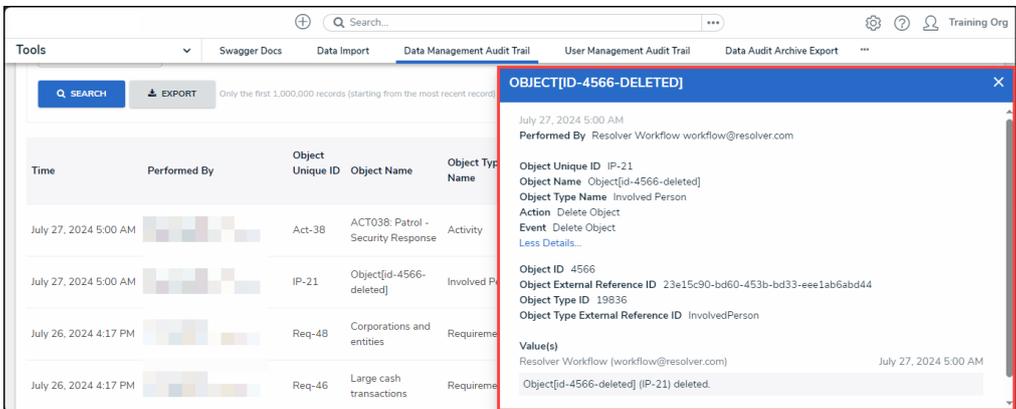
Deactivated - Retain Data for Analytics Toggle Switch

9. Click the **Delete** button. The object will go into a purge queue, the object is removed from the UI and cannot be reverted. It can take up to one week to fully remove the object, and related information from the system.



Delete Button

10. 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.
11. 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

12. 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