

Tech Note:

Deletion

Preservica 6.1

Table of Contents

Editions.....	1
Preservica Versions.....	1
Introduction.....	1
Workflow Context	2
Operator activity: Selection and Starting the workflow	3
Supervisor activity: Approving the Deletion.....	5

Editions

Deletion is included as part of the Cloud Editions (CE), Cloud Editions Essential Pro (CEPro), Enterprise Private Cloud (EPC), Enterprise Private Cloud Perform (EPCP) and Enterprise on Premise (EoP) editions.

In Starter, the deletion process is different than what is described in this document. See separate Starter guides for reference.

Preservica Versions

This document is valid from v6.1

Introduction

The deletion process is a three-step process, which requires two people to complete.

- an **operator** user to (i) select the items for deletion and (ii) to start the deletion process
- a **supervisor** user to (iii) approve the process

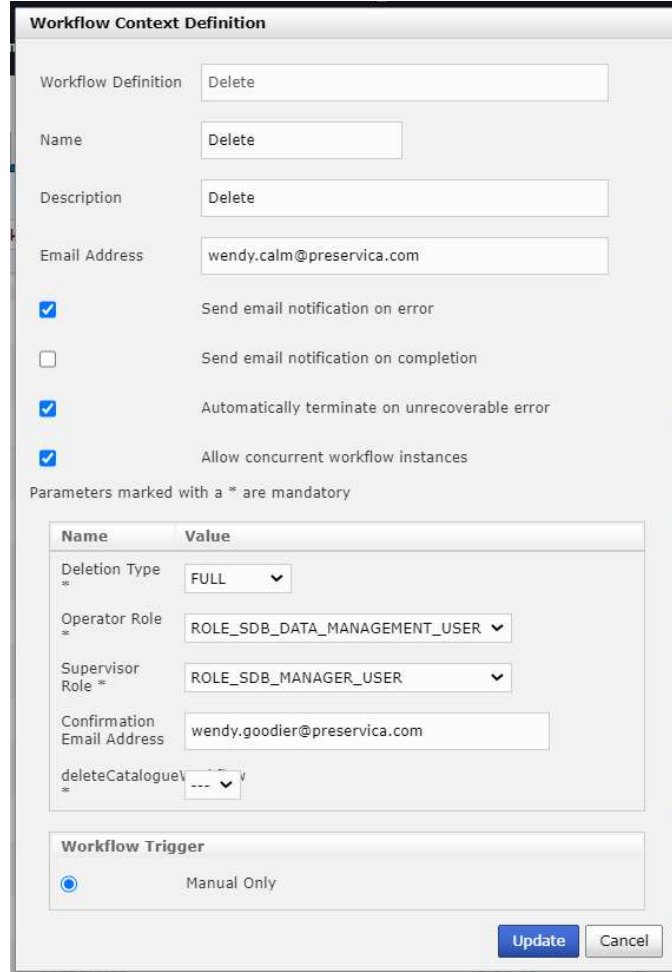
These two users should have distinct roles which are not shared.

The *Delete* workflow is a Data Management workflow that also requires access to Explorer so the operator should be a user who has ROLE_SDB_DATA_MANAGEMENT_USER assigned.

The supervisor can then be a user who has ROLE_SDB_MANAGER_USER assigned, with access to the Administration menu and the ability to set up the workflow context.

Workflow Context

The workflow context definition should be filled in as follows:



Workflow Context Definition

Workflow Definition: Delete

Name: Delete

Description: Delete

Email Address: wendy.calm@preservica.com

☒ Send email notification on error

☐ Send email notification on completion

☒ Automatically terminate on unrecoverable error

☒ Allow concurrent workflow instances

Parameters marked with a * are mandatory

Name	Value
Deletion Type *	FULL
Operator Role *	ROLE_SDB_DATA_MANAGEMENT_USER
Supervisor Role *	ROLE_SDB_MANAGER_USER
Confirmation Email Address	wendy.goodier@preservica.com
deleteCatalogue *	---

Workflow Trigger

☒ Manual Only

Update Cancel

- Decide if the **Deletion Type** should be both Content & Metadata (**FULL**) or just Content, leaving metadata behind (**CONTENT**)
- Identify who will be starting the deletion process – the **Operator Role** – and select the role from the drop down menu (we advise it should be the ROLE_SDB_DATA_MANAGEMENT_USER role)
- Identify who will approve the deletion – the **Supervisor Role** – and select the role from the drop down menu (we advise it should be the ROLE_SDB_MANAGER_USER role)
- The **Confirmation Email Address** should be a person with the supervisor role, so that they can be notified of the deletion needing approval. If this is not defined, then the supervisor will be able to see what needs approval in Preservica by checking the Data Management > Running tab.

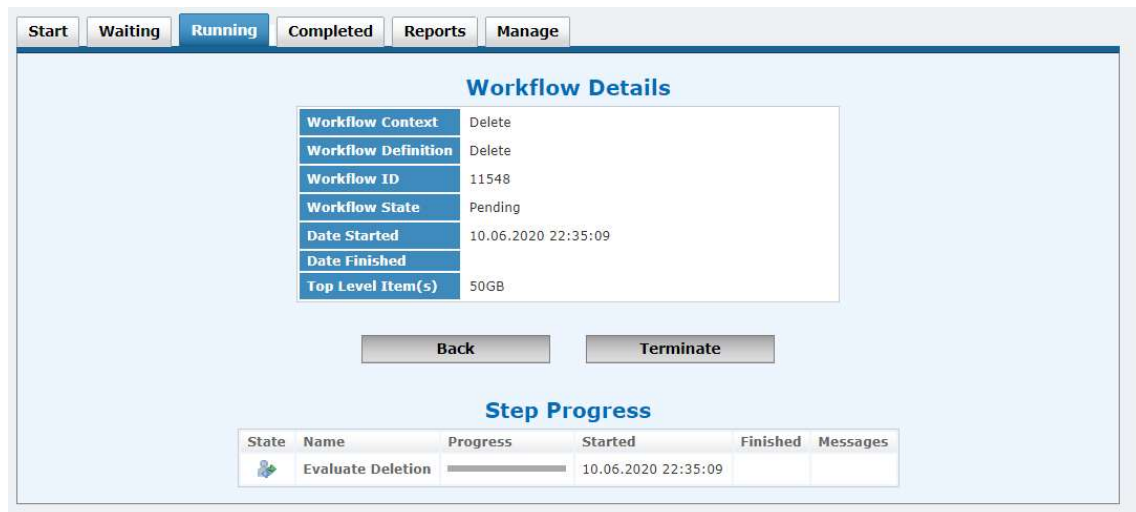
Operator activity: Selection and Starting the workflow

The workflow should be started by the operator user who has the role defined in the *Delete* workflow context. Right click on the folder or asset and select Actions > Delete. Multi-select is possible.

A dialogue box appears asking if the user wants to start the workflow, click **Yes** to proceed and **No** to cancel the action.

A second dialog box displays asking if you want to view the workflow progress, click **Yes**. If you click **No**, the workflow will remain in a waiting state, waiting for the operator user to complete the appropriate steps to start the deletion.


To start the deletion, the operator user clicks on **Evaluate Deletion**.



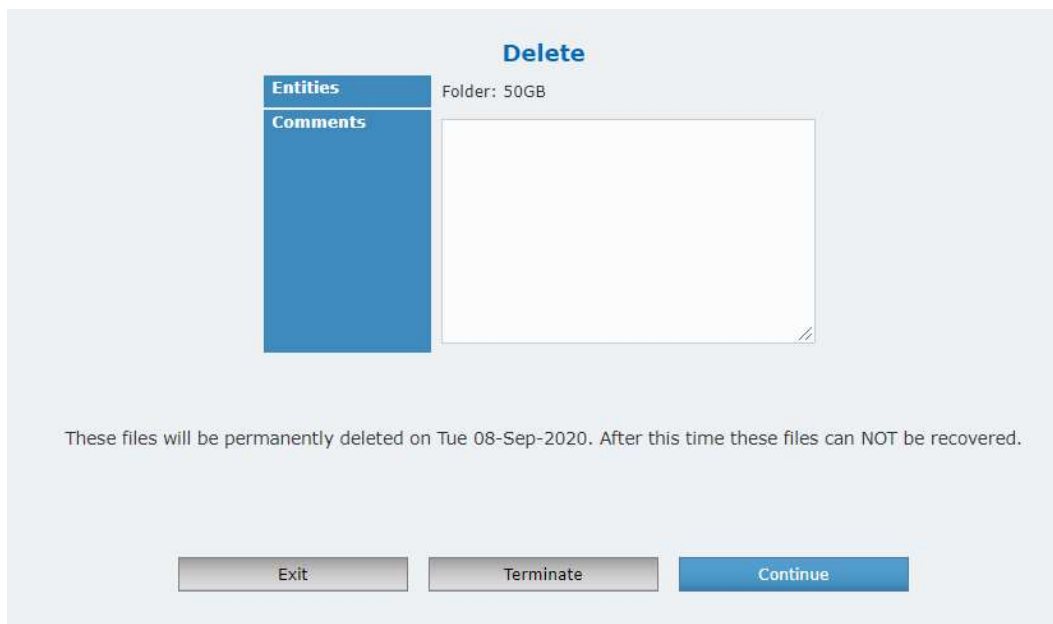
The screenshot shows the 'Workflow Details' page. At the top, there are tabs: Start, Waiting, Running (selected), Completed, Reports, and Manage. Below the tabs is a table with the following data:

Workflow Context	Delete
Workflow Definition	Delete
Workflow ID	11548
Workflow State	Pending
Date Started	10.06.2020 22:35:09
Date Finished	
Top Level Item(s)	50GB

Below the table are two buttons: Back and Terminate. Underneath is a section titled 'Step Progress' with a table showing the progress of the 'Evaluate Deletion' step.

State	Name	Progress	Started	Finished	Messages
	Evaluate Deletion	<div style="width: 100%;"></div>	10.06.2020 22:35:09		

The confirmation page displays the details of the entities affected:



The screenshot shows the 'Delete' confirmation page. It has a table with the following data:

Entities	Folder: 50GB
Comments	<div style="height: 100px;"></div>

Below the table is a warning message: "These files will be permanently deleted on Tue 08-Sep-2020. After this time these files can NOT be recovered." At the bottom, there are three buttons: Exit, Terminate, and Continue (highlighted in blue).

- The scheduled deletion date displayed is based on the standard 90 days retention period.

- The content can be recovered any time up to the scheduled date

You can add comments relating to the deletion. Comments will be included in reports relating to the deletion.

- To return to this page later to enter comments and continue the deletion, click **Exit**
- To cancel the workflow, click **Terminate**. The workflow will be moved to Completed – *Aborted*
- To progress the deletion to approval by supervisor, click **Continue**

Clicking **Continue** moves the workflow to the *Approve Deletion* step, which is where the supervisor takes over.

Workflow Details

Workflow Context	Delete
Workflow Definition	Delete
Workflow ID	11548
Workflow State	Pending
Date Started	10.06.2020 22:35:09
Date Finished	
Top Level Item(s)	50GB

[Back](#) [Terminate](#)

Step Progress

State	Name	Progress	Started	Finished	Messages
	Evaluate Deletion	<div style="width: 100%;"></div>	10.06.2020 22:35:09	10.06.2020 22:41:24	
	Email	<div style="width: 100%;"></div>	10.06.2020 22:41:24	10.06.2020 22:41:26	
	Approve Deletion	<div style="width: 0%;"></div>	10.06.2020 22:41:26		

If the **Confirmation Email Address** field has been populated for the workflow context, an email with a link to the *Approve Deletion* step will be sent to that address.

Otherwise the supervisor can navigate to Data Management > Running tab, find the workflow context in the list, and click on it to get to the approval page.

[Show Filters](#)

Date Created ↓	Workflow Context	Creator	Top Level Item(s)
10.06.2020 22:35:09	Delete	Wendy (CALM)	50GB

Note: If the *operator* tries to complete the next task, which is a supervisor task, you will see this message:

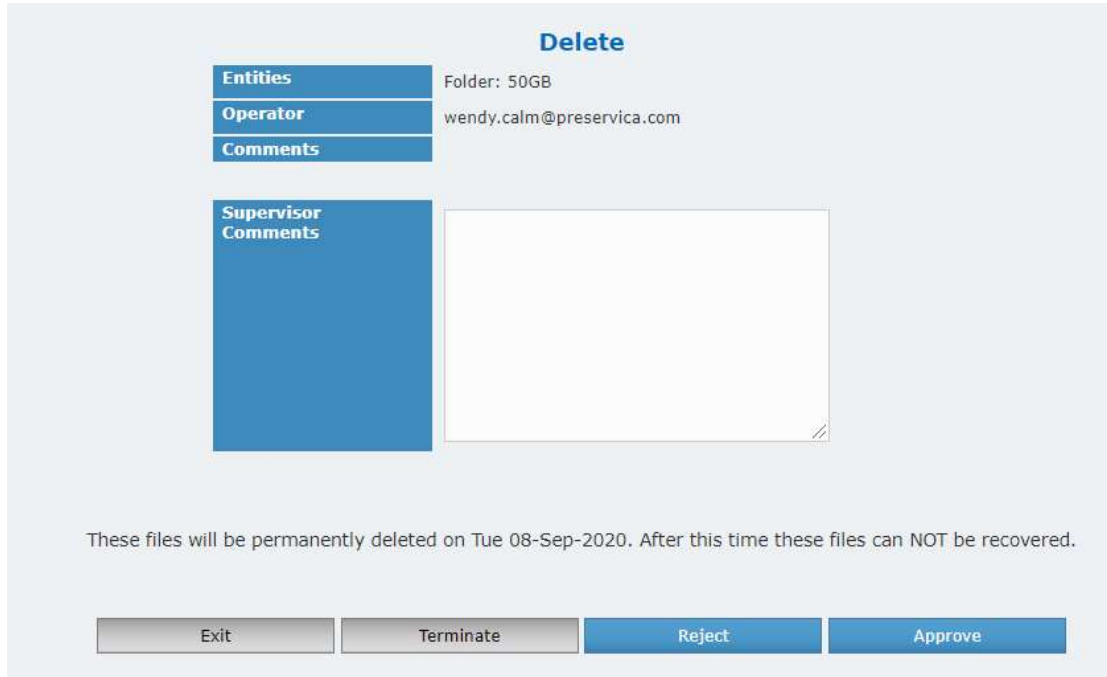


Access is denied

An operator will see the same “Access is denied” message if they started the *Delete* workflow but the *Evaluate Deletion* step was completed by another user and the operator does not have the supervisor permissions to approve the workflow.

Supervisor activity: Approving the Deletion

The confirmation page displays showing the details of the entities affected:



Delete

Entities
Operator
Comments

Folder: 50GB
wendy.calm@preservica.com

Supervisor Comments

These files will be permanently deleted on Tue 08-Sep-2020. After this time these files can NOT be recovered.

Exit Terminate Reject Approve

The supervisor can add comments relating to the deletion here. Comments will be included in reports relating to the deletion.

- To return to this page later to enter Supervisor Comments and to continue, click **Exit**
- To cancel the workflow, click **Terminate**. The workflow will be moved to completed – *Aborted*
- To complete the workflow step and not approve the deletion, click **Reject**
- To progress to the scheduled deletion date based on the retention period, click **Approve**.

Selecting **Approve** will complete the remaining steps in the deletion process:

Start Waiting Running **Completed** Reports

Workflow Details

Workflow Context	Delete
Workflow Definition	Delete
Workflow ID	11548
Workflow State	Completed
Date Started	10.06.2020 22:35:09
Date Finished	10.06.2020 22:50:05
Top Level Item(s)	50GB

Back

Step Progress

State	Name	Progress	Started	Finished	Messages
	Evaluate Deletion	<div></div>	10.06.2020 22:35:09	10.06.2020 22:41:24	
	Email	<div></div>	10.06.2020 22:41:24	10.06.2020 22:41:26	
	Approve Deletion	<div></div>	10.06.2020 22:41:26	10.06.2020 22:49:55	
	Find Entities	<div></div>	10.06.2020 22:49:55	10.06.2020 22:49:55	
	Get Next Batch	<div></div>	10.06.2020 22:49:56	10.06.2020 22:49:59	
	Deletion Request	<div></div>	10.06.2020 22:49:59	10.06.2020 22:50:02	
	Clean Up Batch	<div></div>	10.06.2020 22:50:02	10.06.2020 22:50:04	

If the option to send an email on completion was ticked on the workflow, then an email will be sent to the user who started the workflow (operator).

All content flagged for deletion will be physically deleted when it reaches its expiry date and the *Final System Deletion* workflow is run as scheduled (unless the content is recovered prior to expiry).

Note: If the *operator* clicks on a waiting workflow to *Approve Deletion* when both the *operator* starting the workflow and the supervisor who will approve the deletion each have permissions to perform either role, a message will be shown but there will be no opportunity to approve. This is because the system will not allow the same user to perform both operator and supervisor interactions, regardless of the roles assigned:

Home Requests Configuration

You are viewing an appraisal decision which was submitted by you. The user who submits and approves an appraisal decision for deletion must be different. The request has been successfully submitted, but you need somebody else with the appropriate role to approve it.

These files will be permanently deleted on Fri 04 Jun 2019. After this time these files can NOT be recovered.

Exit

You will also see the above message if the operator starts the workflow (e.g completes the select stage) but the supervisor completed the *Evaluate Delete* task. The supervisor having evaluated the deletion cannot also approve it. The workflow is then stuck if the operator does not have permission to approve. However, if the operator who started the workflow has supervisor permissions, they can complete the approval.

With thanks to Diane Kissane, Test Manager, for the original document.