



Archive Classic

User Guide

June 16, 2022
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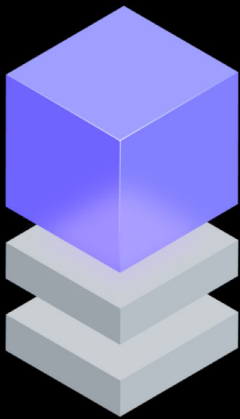


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Getting Started

Complete the steps below. Once you have completed the steps, please reach out to support@ownbackup.com, and we will coordinate a time for you to complete the onboarding process.

1. Prepare a Sandbox environment to install the app.
OwnBackup will onboard you on a Sandbox environment so that you can safely configure and test before electing to promote to production.



NOTE

You must deploy My Domain in your org if you want to use Lightning components in Lightning tabs, Lightning pages, as standalone apps, as actions and action overrides, as custom Lightning page templates, or elsewhere in your org.



NOTE

Once activated, the domain name cannot be undone.

2. Define your business use cases.
 - The objects and related objects you want to archive and why.
 - The scheduled frequency the Archive should run (weekly/daily/monthly)?
 - What day of the week or month and time should the archive policy run?
 - Who has the ability to set up archiving policies (admins only)?
 - Permission Sets can be assigned to appropriate system admins
 - OwnBackup_CDE_Policy permission set allows you to create, delete, and edit the policy
 - Archived data audience (admins only/end users/auditors/etc.)
 - Access permissions to the unarchive records (admins only/end users/auditors/etc.)
 - Permission Sets can be assigned to appropriate users
 - OwnBackup_Unarchive permission set allows you to unarchive records
 - Do you plan to insert the OwnBackup Archive widget to a page layout? If so where?



NOTE


For further reading please see the Admin Guide under “Use Cases” (attached).

Installing the OwnBackup Archive Package

1. Navigate to the Archive App on the AppExchange. Click **Contact Me** for first time users. Alternatively, you can find the link to the Archive package in the release notes for current users.

The provider helps with installation

To install this package, the provider would like to contact you to assist with setup.

 This app does not list support for your edition of Salesforce. You can continue installation, but it may fail later in the process.

Here are the details we'll share from your profile [Edit Profile](#)

* First Name	Roni	* Company	OwnBackup
* Last Name	Cohen	* Country	Israel
Job Title	Technical Writer	State/Province	
* Email	ronic@ownbackup.com		
Phone			


* ☒ I have read and agree to the [terms and conditions](#).


By submitting this request, you agree to share your information with Salesforce and the provider of this listing, OwnBackup.

Listing: OwnBackup Archive - Archive Data, Accelerate Performance, Reduce Storage Costs

CancelContact Me

2. Select an option for installation: Admins Only, All Users, or Specific Profiles.
 - Our best practice recommendation is to select "Admins Only".
 - This configuration determines who can manage and create archiving policies.
3. Click **Upgrade**.
4. Click **Done**.

 **Upgrade Archive**
By

 **This app is taking a long time to upgrade.**
You will receive an email after the upgrade has completed.

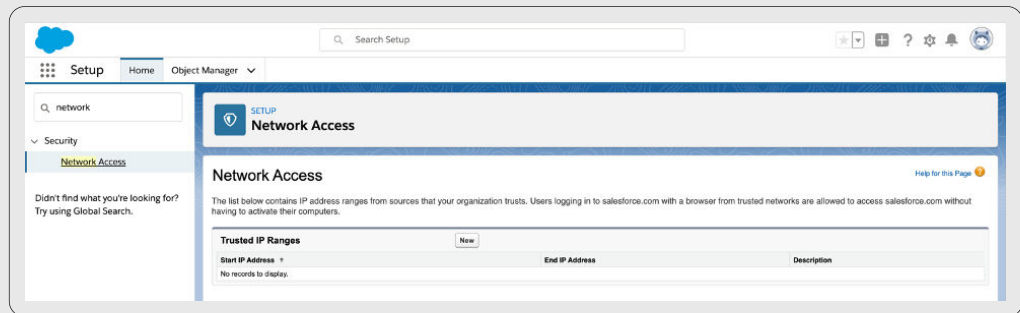
Done

App Name	Publisher	Version Name	Version Number
Archive		OwnBackup Archiver	13.18

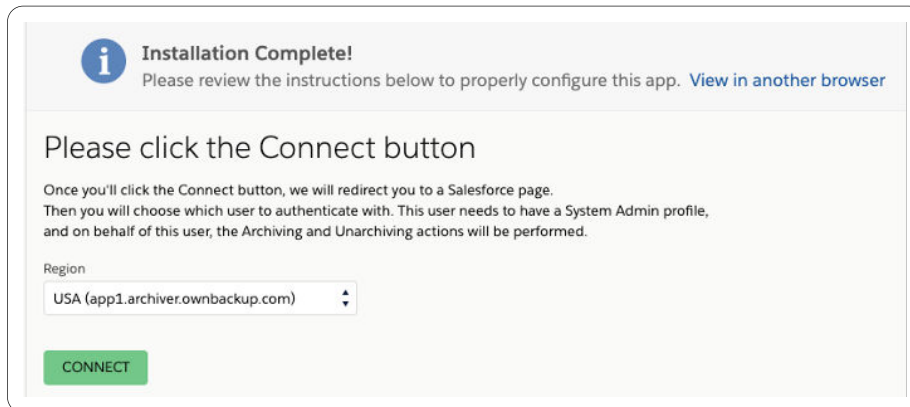


NOTE

If IP Restrictions are enable within your Salesforce environment, you need will to white list the OwnBackup Data Center IP Addresses.



5. When the installation completes, the Installation Complete page is displayed.



NOTE

If the installation requires extra time, Salesforce will send an email. Once the installation is complete you can go directly to [Connect/Configure \[8\]](#).

6. In the Region field, select the OwnBackup region (USA/HIPAA/Europe,etc.).
7. Click **CONNECT**.
8. The app must be configured with an authenticated user to archive/unarchive records with OwnBackup.
The connected user must have a minimum Admin-level permission.
The archiving operations are performed via the connected user account.
9. Log in with the appropriate user credentials for the account that will be the connected user.
10. Click **Allow**.
11. Transfer to the following page indicates a successful installation.

**Thank You for
registering with**
Own{backup} **Archiver**

Org ID: 00D36000001DzWsEAK
Organization URL: <https://na82.salesforce.com>
Registered User: lihod@ownbackup.com
Archiver Region: app1



NOTE

There are three different types of users:

- **Integration user:** The authenticated user. This is the user that OwnBackup uses to access your Salesforce environment. This user has nothing to do with the users using the archive tool.
- **Admin Users:** Typically, the users using the tool are admins. Even though an admin may have access to every record/object in Salesforce, if the integration user does not, policies will fail to run if the admin selects an object the integration user does not have access to.
- **End users:** Users accessing Salesforce who are not admins. Admins can choose which end users have access to viewing archived records and if they can or cannot unarchive records.

Connect/Configure



NOTE

Skip this step if already configured.

These steps only apply if you did not register an authenticated user during the setup process, or when you need to change the authenticated user. The app must be configured through an authenticated user to archive/unarchive records with OwnBackup.

The connected user must have Admin-level access at a minimum. The archiving operations are performed with the connected user account.

1. From the Salesforce Setup Page navigate to Installed Packages.
2. Click **Configure** next to the OwnBackup Archive.


Installed Packages



On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

[Visit AppExchange »](#)

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	 Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	12/3/2018 5:21 PM	✓	0	0	0	Not Passed
Description This package contains Connected Applications for all the officially supported Salesforce client applications such as Touch, Salesforce for Outlook, Sa...										
Uninstall Configure	 Archive	obarchive	13.18	OB_Archiver	3/14/2019 3:07 PM	<input type="checkbox"/>	2	15	5	Passed

Uninstalled Packages

No uninstalled package data archives

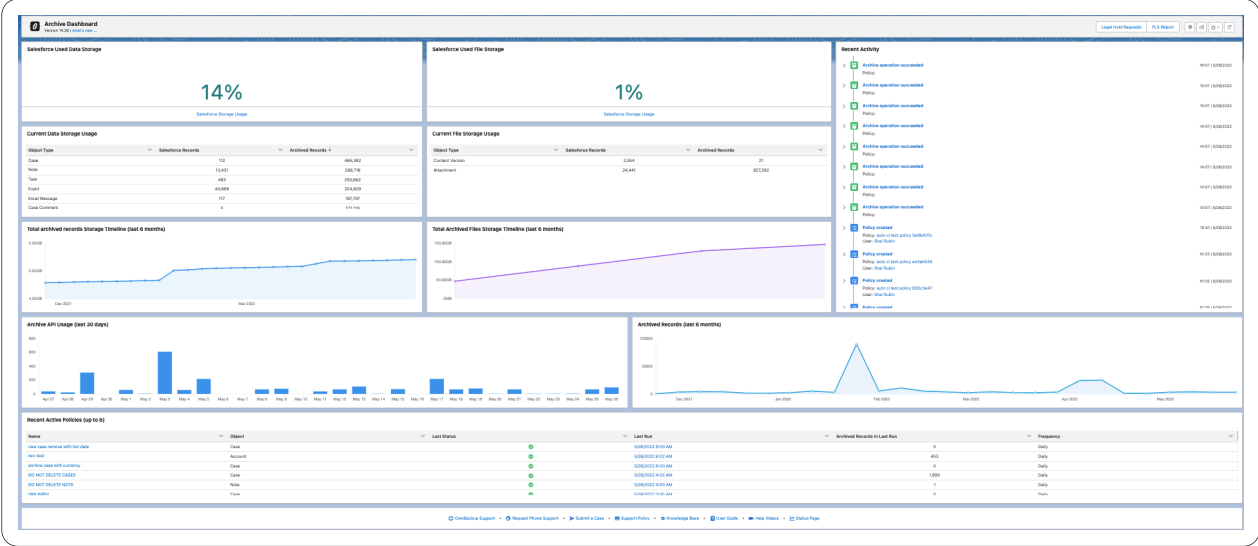
3. Log in with the appropriate user credentials for the connected user.
4. Click **Allow**.

Additional Considerations for the Authenticated User

- Archive utilizes the Salesforce API and requires the authenticated user to have “Modify all data” permissions.
- A license of any installed package (whose data you want to archive and that requires a license to access its data) must be assigned to the authenticated user.
- At a minimum, Read/Edit/Delete Access to all Standard & Custom objects can be configured from the Field Level Security page.
- For extra security, we recommend you:
 - Set a permission set “API Only User” to only access SFDC through the Salesforce API.
 - Add IP Restrictions for that user and only add the IP of the region.

Dashboard

When selecting the Home Page in Archive, the Archive dashboard appears.



NOTE
Any objects in the recycle bin are not counted.

- **Salesforce Used Data storage**

The amount of storage that is used by your Records in the Org is displayed in percentages. Salesforce indicates the risk of running out of storage as follows:

- Green - No storage risk
- Yellow - Heading towards a storage risk
- Red - Storage risk you need to consider adding more policies / update existing ones

- **Salesforce Used File Storage**

The amount of files the storage uses from the Records in the Org is displayed in percentages. Salesforce indicates the risk of running out of storage as follows:

- Green - No storage risk
- Yellow - Heading towards a storage risk
- Red - Storage risk you need to consider adding more policies / update existing ones

- **Current Data Storage Usage**

This is displayed in a table that shows the top archived objects according to record count. The table also displays your current record count in Salesforce.

- **Current File Storage Usage**

This is displayed in a table and shows archived objects based on your archived data.



NOTE

You can see the most recent objects by clicking on the top of the column.

- **Total Archived Records Storage Timeline**

Displays the Record storage in the table and shows what has been archived over time. The timeline updates every two hours, when data has been subtracted for the following reasons:

- Unarchive
- Purge
- Retention
- Right to be Forgotten (RTBF)

- **Total Archived Files Storage Timeline**

Displays the amount of File storage that is archived over time. You can see the file storage on a weekly basis and displays information from the last six months.



NOTE

The Archive Usage is no longer available in the new Archive package.

- **Archived API Usage**

Displayed as a bar chart and shows the daily API consumption (REST only) of the Archive. The chart is updated once a day and displays all information from the last 30 days.

- **Archived Records**

Displayed in a graph and shows the weekly count of archived records from within the last six months. The graph is updated every two hours and only displays Archive activities not the subtracting events.

- **Recent Active Policies**

This displays the most recent policies. This is seen in real time.

Configuring Policies

You can configure Archive and Purge Policies in Archive. Configure Archive policies to automatically archive specific records from Salesforce. Configure purge policies in line with your regulatory and compliance requirements to remove records from Archive

Archiving Policies

We recommend considering the following prior to creating your Archiving Policies.

- Which objects and related objects do you want to archive and why?
- What is the scheduled frequency the Archive should run (weekly / daily / monthly)?
- Who has the ability to set up archiving policies (Admins only)?
- Permission Sets can be assigned to appropriate system admins
- OwnBackup_CDE_Policy permission set allows you to create, delete and edit policies
- Who needs to see the archived data? (Admins only / End users / Auditors / etc.)
- Who has access to the unarchive records? (Admins only / End users / Auditors / etc.)
- Permission Sets can be assigned to appropriate users
- OwnBackup_Unarchive permission set allows you to unarchive records

Archive Settings

There are several settings on the Archive Home Page allowing you to further configure the Archive tool.

1. Click the settings icon to open the **Archive Settings**.

The screenshot displays the Archive Dashboard interface. At the top, there's a header with the 'Archive Dashboard' title, version '13.18', and a 'Legal Hold Requests' / 'FLS Report' section. The main content area is divided into four panels: 'Salesforce Used Data Storage' and 'Salesforce Used File Storage' both showing '0%' usage; 'Current Data Storage Usage' and 'Current File Storage Usage' showing tables of object types and their counts. The 'Recent Activity' panel on the right lists several 'Policy created' events for various Salesforce objects like Case, EmailMessage, Opportunity, Task, and Account, all created by 'Roni Cohen' on '4/4/2022'. A footer bar contains links for 'OwnBackup Support', 'Request Phone Support', 'Submit a Case', 'Support Policy', 'Knowledge Base', 'User Guide', 'Help Videos', and 'Status Page'.

0%

0%

Object Type	Salesforce Re...	Archived Rec...
Archive Configurati...	1	0
Price Book	1	0
Other Objects	0	0

Object Type	Salesforce Re...	Archived Reco...
Content Version	1	0
Attachment	0	0

Recent Activity

- > **Policy created** 00:43 | 4/4/2022
Policy: Out Of The Box Policy Case
User: Roni Cohen
- > **Policy created** 00:43 | 4/4/2022
Policy: Out Of The Box Policy EmailMessage
User: Roni Cohen
- > **Policy created** 00:43 | 4/4/2022
Policy: Out Of The Box Policy Opportunity
User: Roni Cohen
- > **Policy created** 00:43 | 4/4/2022
Policy: Out Of The Box Policy Task
User: Roni Cohen
- > **Policy created** 00:43 | 4/4/2022
Policy: Out Of The Box Policy Account
User: Roni Cohen

2. The Archive Settings window opens. Select from the following tabs.

Archive Settings

▼

Org Metadata Information

Organization Id

00DM0000001YJumMAG

Organization Type

Sandbox

Archiver Version

13.18

Region

https://stg-archiving.own-backup-dev.com

>

Integration User

Change Integration User

>

Features Settings

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Cancel

Save

Org Metadata Information

Your Organization Id, Organization Type, Archive Version and Region are displayed.

Integration User

Your User Name, Email and User Id are displayed in the Integration User section.

Feature Settings

In the Archive Settings, you can control the following parameters:

- **Unarchive Retention Period:** Configure the number of days an unarchived record remains in Salesforce main storage before being re-archived. You can now enter the amount of days for the retention period. You must enter a value between 0 - 30 days.
- **Archive REST API Limit:** Configure the Archive REST API Limit. Archive stops any operation using more REST API calls than the configured limit. Valid entries are: 100 - 300000. By default, the archive bulk size is 2500. You can now enter the exact amount of entries.
The REST API calls are counted based on a rolling 24 hour period. Call usage is recorded per org with a timestamp and not correlated to your time zone. When the daily limit is reached, the operation stops, and will restart again once the 24 hour period is over.
For example, if you create an archive using 50K calls at 11:00 UTC, another archive with 10K calls at 13:00 UTC, and a third archive with 50K calls at 10:00 UTC the following day, then the final archive operation might be aborted in the middle once the REST API calls limit is reached.
- **Archived data protected from purge:** This protects your from deleting data from Archive for a certain amount of time. It will not be subject to purge. You can enter the exact amount of days that you would like to protect from Purge.
- **Salesforce data protected for:** Enter the amount of days for your data to be protected from being archived and saved in Salesforce (hot data).
- **Use hard-delete during archive:** The default setting is not selected (recommended). Select to prevent archived records appearing in the recycle bin. This setting requires the connected user to have the "Bulk API Hard Delete" permission set assigned.
- **Archive Based on Lookup Relations:** This advanced feature enables you to add lookup relations as part of the archive operation.
By default, OwnBackup Archive uses master-detail only during archive. Meaning that once a root record is archived (e.g. Case), Archive also archives all its master-detail children (and their children); records connected to the root with master-detail relations (e.g. Email). This feature allows you to add additional children to the archive operation; records that are connected with lookup relations.
- **Preserve original Salesforce Case Number when unarchiving a record:** Salesforce automatically generate the numbering in the Case Number field. When an archived record is unarchived back to Salesforce, the record is treated as a new Salesforce record and assigned a new Case Number. Check this box to preserve the original case number in a designated field for business continuity when unarchiving the record.
- **Enable unarchive when parent in archive:** OwnBackup does not recommend this option, as unarchiving a child object without the parent creates an orphan object, due to the parent no longer residing in Salesforce.
- **Archive accounts with closed won opportunities:** Enables Archive to archive, normally protected from deletion by Salesforce, Accounts with Opportunities designated as closed won. Allows the user to decide whether to enforce the archiving of accounts with closed-won opportunities.
- **Boost archive operation:** Reduces the total archive time by approximately half. The single archive job is split into two jobs that run in parallel. Boost is only utilized when there are more than 500K records to archive.
Running the boost feature may also increase the the rate of API calls which in turn could lead to connection issues and effect the success of the archive process.
- **New and improved Policy Configuration window (beta):** Opens a new Policy Configuration window, with enhanced UX, which replaces the traditional window.
This is turned on by default.



NOTE

If you make any changes on any fields, you must remember to click **Save** or the changes will not be saved.

Impossible Queries

Impossible Queries

Run the archive query against your latest backup instead of against Salesforce in case of Salesforce timeout.

* Service Id ⓘ

* OwnBackup login email

* OwnBackup login password

Test Connectivity

© 2018-2021 OwnBackup Ltd. Ownbackup proprietary and confidential. Cancel Save

Run the archive query against your latest backup instead of against Salesforce in case of Salesforce timeout.

1. Enter your Service Id. Copy the backup service id from the service's URL.
2. Enter your OwnBackup login email.
3. Enter your OwnBackup login password.
4. Click **Test Connectivity**.

Example of Use Cases & Queries

1. Archiving Tasks.
 - Object: Tasks
 - Preview: Id, Activity Date, Category (custom field) Description, Owner ID, Subject, Status
 - Use Case: Archiving Tasks that are associated with a specific record type of contact (ie RecordTypeID = 'abc') and last modified more than 2 years ago
 - Limit = 5, archives 5 tasks in each run and its related objects
 - NOTE: For testing purposes, we recommend starting out with a low limit to initially test the policy

Example query: `Select Id, ActivityDate, Category__c, Description, OwnerId, Subject, Status, WhoId, CreatedDate FROM Task WHERE WhoId IN (SELECT Id FROM Contact WHERE RecordTypeID = 'abc') AND ActivityDate < LAST_N_DAYS: 730 LIMIT 52.`

1. Archiving Cases.
 - Use Cases: Archive cases that meet the following criteria:
 - Status is closed
 - Created more than 30 days ago
 - Limit = 5000, archives 5000 cases in each run and its related objects
 - Preview: Id, Case Number, Type, Sub Category (custom field), Issue (custom field)

Example Query: Select Id, CaseNumber, Type, Sub_Category_c, Issue_c from Case WHERE Status = 'Closed' AND CreatedDate < LAST_N_DAYS: 30 LIMIT 50003. Archiving Cases From a Specific Account.

Creating an Archiving Policy

1. Navigate to the Policies tab.
2. Click **New**.

The screenshot displays the 'View New Test 11' configuration page. It features a 'Details' tab and a 'Preview Table' tab. Under 'Policy Information', there is a 'Policy Name' field with the value 'New Test 11', a 'Description' field, and an 'Enabled' toggle switch. The 'Schedule Policy (UTC)' section includes a frequency dropdown set to 'Day' and a time dropdown set to '02:00 AM'. A note below these fields states: 'Your policy runs every day at 18:00 according to your salesforce instance timezone'. At the bottom of the form are four buttons: 'Estimate', 'Run Now', 'Edit', and 'Cancel'.

3. **Policy Name:** Enter an identifiable name. (e.g. Inactive Cases Opened 2 Years Ago).
4. **Archived SObject:** A list of objects in your org. Select any standard or custom object in the list. The selected object and all its related objects will be archived.
5. **Description:** Include a Policy Description.
6. **Scheduled Policy (UTC):** Schedule the frequency to run the policy (Daily/Weekly/Monthly). If applicable, additional options are displayed.
 - All dates and hours are in UTC, make sure to adjust the time according to your time zone.
 - When selecting Daily you are prompted for the Hour.
 - When selecting Weekly you are prompted for the day of the week (Sunday-Saturday) and then the Hour.
 - When selecting Monthly you are prompted for the day of the month and then the Hour.
7. **Choose Query Option:**
 - By filter: See more information [here \[17\]](#).
 - Manually: See more information [here \[17\]](#).
8. **Deleted and archived records:** Select to exclude or include archived records. This feature relates to the Salesforce Archived Activities, if you selected to include which OwnBackup can delete/archive as part of the Archiving process.

- Salesforce archives the following activities:
 - Events tended more than 365 days ago.
 - Closed tasks due more than 365 days ago.
 - Closed tasks created more than 365 days ago (if they have no due date).
- Salesforce does not delete archived activities, but you can manually delete them or use Archive to delete them from Salesforce and Archive into AWS/Azure.
- When you create or refresh a sandbox, archived activities are not copied.
- You can view and interact with archived activities in exported data and in certain locations in Salesforce.

9. **Filter results by:**

- Select the applicable option from the Take Action When drop-down list:
 - **All conditions are met:** Select this option when all the conditions in the condition builder should exist (similar to “AND” between conditions).
 - **Any condition is met:** Choose this option when at least one of the conditions in the condition builder should exist (similar to “OR” between conditions).
- Set the maximum number of records.
- Select an object from the Field drop-down list.
- Select one of the arguments from the Operator drop-down list.
Dependent on the selected field’s type, the applicable operator will appear (=, >, <, Startwith, End with, etc).
- Select the value you wish to filter by the results from the Value drop-down list.
- Click **Add Condition** to add an additional condition in the condition builder for more complex conditions.
- **Reset Query:** Will clear all the conditions built so far and allow you to start over.
- **Delete:** Will delete the reference condition.

10. **SOQL Query:** Customize the SOQL query and create your own complex query.

11. **Use Impossible Queries for this query:** For a query that may be timed out by Salesforce, archive will run the query against your latest backup instead of against Salesforce.

12. **Archive related content documents:** Any ContentDocument record associated with another object in the archive tree will be archived together with that object.

13. **Fields configuration:** This selects the previewed fields of the policy in addition to the previewed fields in the Archive widget. The fields that you select will be shown in the preview widget.

- Select up to 8 fields to present in the visualforce page when viewing the archived records.
- Archived record visibility is defined by Salesforce profiles and permission sets.
- To view the archived records in a parent or related object, you must first add the widget to the detailed page.

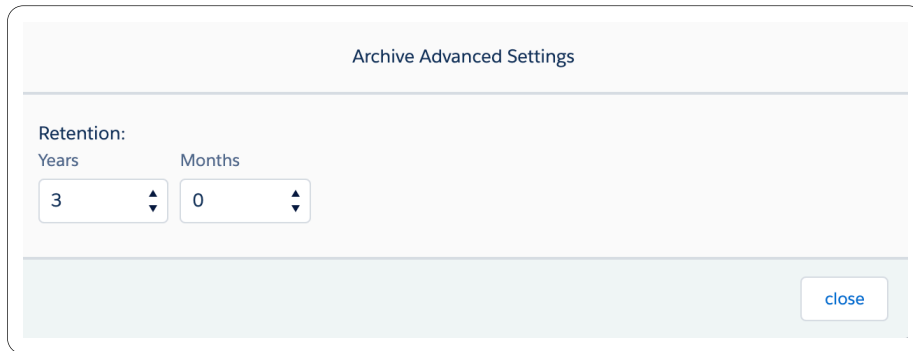


NOTE

The fields selected in this visualforce element are not protected by Salesforce field level permission.

14. **Enabled:** When set to off, policy scheduled execution is prevented.

15. **Advanced:** See [Archiving Retention \[27\]](#).



The image shows a dialog box titled "Archive Advanced Settings". Inside, there is a section labeled "Retention:" with two sub-sections: "Years" and "Months". The "Years" field is a dropdown menu currently showing the value "3". The "Months" field is a dropdown menu currently showing the value "0". At the bottom right of the dialog box, there is a button labeled "close".

16. Click **Preview**, **Save**, or **Run Now**.

- **Preview:** Shows the records that will be archived.



NOTE

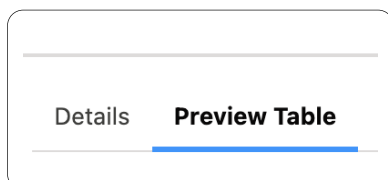
Records for Archive may exist, however they are may not show for preview. The archiving process will find records to Archive.

- **Save:** Allows you to save the policy without running the archiving process now.
- **Run Now:** Begins the archiving process.

Preview Table

Locate the policy in the table and open that policy.

1. Click on the Preview Table tab.



The image shows a tabbed interface with two tabs: "Details" and "Preview Table". The "Preview Table" tab is currently selected, indicated by a blue underline beneath its label.

2. Click **Edit** to edit the fields.
3. Select all the fields that you wish to add.

View New Test 11

Details
Preview Table

Preview Settings

Select the fields you want to see in the Preview table and on Archiver Widget

Fields

- AccountSource
- BillingAddress
- BillingCity
- BillingCountry
- BillingLatitude
- BillingLongitude
- BillingPostalCode

Selected Fields

- Id
- AnnualRevenue
- BillingGeocodeAccuracy

Preview

Preview

Save
Cancel

4. Click **Preview** to view the table with your selected fields.

Preview

Preview

	Account ID ▼	Annual Revenue ▼	Billing Geocode Accuracy ▼
1	00176000002ulW4AAM		
2	00176000002ulW5AAM		
3	00176000002ulW6AAM		
4	00176000002ulW7AAM		
5	00176000002ulW8AAM		
6	00176000002ulW9AAM		
7	00176000002ulWAAA2		
8	00176000002ulWBAAM		

5. Click **Save**.



NOTE

Use Estimate to look into the records that will be archived next time it runs. The estimate is limited to 2000 records.

Archiving a Content Document Related to a Specific sObject

Create the policy as follows:

1. Open a new policy window.

New Archiving Policy

DetailsPreview Table

Policy Information

* Policy Name

Archiving

Description

Enabled

☒

Schedule Policy (UTC)

* Every...

* On

* At

Month

1

12:00 AM

Your policy runs on the 31 of every month at 16:00 according to your salesforce instance timezone



NOTE

If it is missing, make sure the feature is enabled, and the archived sObject is ContentDocument.

2. Create a new policy with **ContentDocument** as the Archive SObject. You can Archive content document while keeping the parent object in Salesforce.

Query Details

* Archive SObject

ContentDocument

Select object to archive its content document ⓘ

All sObjects

[How to archive a Content Document related to a specific sObject](#)

⚠ If you archive a ContentDocument, you will not be able to access it from this, or any other related object in Salesforce.

Query

Manual

* SOQL Query

SELECT Id FROM ContentDocument LIMIT 10

☐ Lookup relations archiving ⓘ

SaveCancel



NOTE

Select ContentDocument, regardless of the object selected and the limit set in the query, ContentDocument is filtered as a whole, objects that are not related are disregarded, only the remaining objects are filtered. This may result in archiving fewer records than the limit set. It is recommended to enter a higher limit.

3. Select an object from the drop-down list to archive its content document.

Account

AccountBrand

Asset

AssetRelationship

AuthorizationFormText

Bug__c

Campaign

Case

Select an Option ▼

4. Click **Save**.

Advanced Settings

Archive Lookup Relationship

During an Archive job, all related objects with a “CascadeDelete” relationship will be removed, but in some cases, you would be interested in deleting the Non Cascade Delete like lookup relationship.

On a different scenario, when trying to archive a parent object with a child object lookup relationship where the “Don’t allow for the deletion of the lookup record that’s part of a lookup relationship” option is selected it is important to note Archive will not violate the rule set up within your Salesforce environment and keep the records from being deleted. To support this requirement, OwnBackup Archive has an option to delete those non-cascade-delete records by first removing them, and then deleting the parent object.

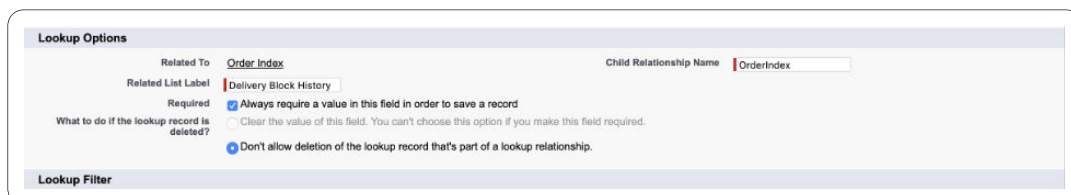
Let’s say you want to archive Accounts but it was blocked by some of them having Cases attached. This can be addressed with the following steps:

1. At the bottom of the Policy (on Edit mode), click on “Advanced”.
2. Select under Child object “Case” and for the “Lookup Field Name” the field on the case object that refers to Account, in our example, AccountID.
3. Multiple Child objects can be added in the same way.

Archive Lookup Relationship

During an Archive job, all related objects with a “CascadeDelete” relationship are removed, in some cases, deleting the Non-Cascade Delete like lookup relationship can also be of interest.

Alternatively, when trying to archive a parent object with a child object lookup relationship, where the “Don’t allow for the deletion of the lookup record that is part of a lookup relationship” option is selected, it is important to note, Archive will not violate the rule set up within your Salesforce environment and keep the records from being deleted.



To support this requirement, OwnBackup Archive has an option to delete the non-cascade-delete records firstly by removing them, and then deleting the parent object.

To Lookup Relations Archiving:

1. Navigate to the Policies tab.
2. Click **Go!** to view All Policies.

All Policies [Edit](#) [Delete](#) [Create New View](#)

[New Policy](#) [Change Owner](#)

<input type="checkbox"/>	Action	Active	Policy Name	SObjectName	Query	Frequency	Schedule On	Schedule Time	JobId
<input type="checkbox"/>	Edit Del	✓	Archive Account1	Account	SELECT Id FROM Ac...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	Account1 and child...	Account	Select Id From Accou...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	case	Case	SELECT Id FROM C...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	contact	Contact	Select Id From Conta...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	A11y_Test1	Account	Select Id From Accou...	Weekly	Monday	12:00 AM	
<input type="checkbox"/>	Edit Del	✓	Cases	Case	Select Id From Case ...	Weekly	Sunday	9:00 PM	
<input type="checkbox"/>	Edit Del	✓	jhlhj	Account	SELECT Id FROM Ac...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	case	Account	SELECT Id FROM Ac...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	Archive File 06905...	ContentDocument	SELECT Id FROM C...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	Archive Cont Doc 1	ContentDocument	SELECT Id FROM C...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	Archive Email1	EmailMessage	SELECT Id FROM E...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	Email2	EmailMessage	SELECT Id FROM E...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	email 02a05000000C...	EmailMessage	SELECT Id FROM E...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	Test Case1	Case	SELECT Id FROM C...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	Archive Email Messa...	EmailMessage	SELECT Id FROM E...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	Archive File 08_03	ContentDocument	SELECT Id FROM C...	Daily		12:00 AM	



NOTE

Policies prior to package 11 will have no value in the Record Type column in the table. If you update the policy the Record Type will be updated.

- Locate the record you wish to use.

<input type="checkbox"/>	Action	Active	Policy Name	SObjectName	Query	Frequency	Schedule On	Schedule Time	JobId
<input type="checkbox"/>	Edit Del	✓	Archive Account1	Account	SELECT Id FROM Ac...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	Account1 and child...	Account	Select Id From Accou...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	case	Case	SELECT Id FROM C...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	contact	Contact	Select Id From Conta...	Daily		12:00 AM	
<input type="checkbox"/>	Edit Del	✓	A11y_Test1	Account	Select Id From Accou...	Weekly	Monday	12:00 AM	
<input type="checkbox"/>	Edit Del	✓	Cases	Case	Select Id From Case ...	Weekly	Sunday	9:00 PM	
<input type="checkbox"/>	Edit Del	✓	jhlhj	Account	SELECT Id FROM Ac...	Daily		12:00 AM	

- Click **Edit**.

- In the Query Details section, select the **Lookup Relations Archiving** checkbox.

☒ **Lookup Relations Archiving** ⓘ

Select Child Object: Case Lookup Field Name: AccountId

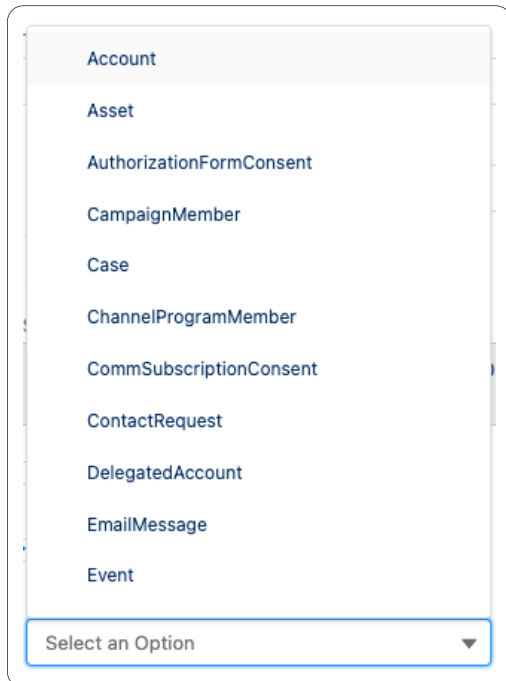
Select Child Object: FeedComment Lookup Field Name: ParentId

[+ Add Child Object](#)

[> Advanced](#)

[Save](#) [Cancel](#)

6. In the **Select Child Object** drop-down list, select an object.



A screenshot of a web application interface showing a 'Select Child Object' drop-down list. The list is open, displaying a scrollable menu of object names. The objects listed are: Account, Asset, AuthorizationFormConsent, CampaignMember, Case, ChannelProgramMember, CommSubscriptionConsent, ContactRequest, DelegatedAccount, EmailMessage, and Event. The 'Account' option is highlighted at the top. At the bottom of the list is a text input field with the placeholder text 'Select an Option' and a downward-pointing arrow icon.

7. In the **Lookup Field Name** drop-down list, select the field related to the selected object.
8. If required, Click **Add Child Object** and repeat to add more objects.
9. Click **Save**.

Archive Related ContentDocument

There are two ways you can Archive a content document.

Example 1:

If you want to keep the Record in Salesforce, but Archive the related content document.

For example, an Order with a related video or images:

1. When creating a New Policy, select the ContentDocument in the Archive sObject field.

Query Details

* Archive sObject: ContentDocument

Select object to archive its content document: All sObjects

[How to archive a Content Document related to a specific sObject](#)

⚠ If you archive a ContentDocument, you will not be able to access it from this, or any other related object in Salesforce.

Query: Manual

* SOQL Query: SELECT Id FROM ContentDocument LIMIT 10

☐ Lookup relations archiving

Save Cancel

2. In the Advanced section of the New Policy window, in ContentDocument Archiving select the object you want to archive.
3. Click **Save**.

Example 2:

If you want to Archive a record together with the related content document.

For example, a case with an Attachment:

1. In the New policy window, select Case in the Archive sObject. In this case the options in the advanced settings are different.
2. Select the check box, Archive related content documents.

New Archiving Policy

Query Details

* Archive sObject: Case

Query: Manual

* SOQL Query: SELECT Id FROM Case LIMIT 10

☐ Lookup relations archiving

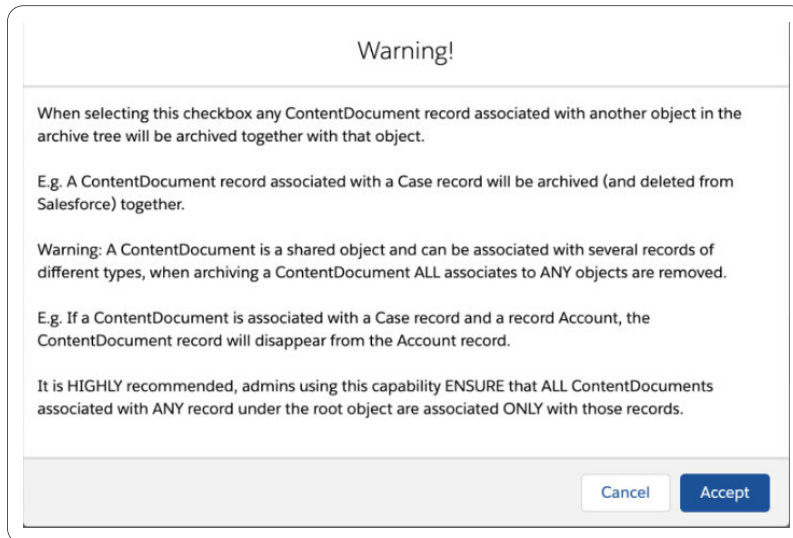
☒ Archive related content documents

Retention Policy

Years: 3 Month: 0

Save Cancel

A warning appears.



3. Click **Accept**.
4. Click **Save**.

Archiving Retention

Retention allows you to configure when the archived records (the record and its related records) will be automatically purged.



NOTE

Retention relates to the archived date, not the record creation date.

- Min retention can be 1 month
- Max retention can be 99 years + 11 months

New Archiving Policy

Policy Name

Example

Description

Enabled

☒

Schedule Policy (UTC)

Every...

Select an Option

Query Details

Archive SObject

Select an Option

Query

Filter

Limit Query

10

SQL Query

Retention Policy

Source

Years

0

Month

1


Cancel

Save & Close

Save


Pre-defined Policy



To assist your onboarding process there are five automatic policies that you can activate or edit.



NOTE
Example policies are already created.

- 1. Navigate to policies tab and click **Policy**.
- 2. Click on an example policy.







 Policies











Policies  

New

5 items • Sorted by Policy Name • Filtered by All policies - Soft deleted • Updated 5 minutes ago

Search this list...

	Policy Name 	SObjectName 	Schedule On 	Schedule Time 	Record Type 
1	Out Of The Box Policy Account	Account		2:00:00 AM	
2	Out Of The Box Policy Case	Case		2:00:00 AM	
3	Out Of The Box Policy EmailMessage	EmailMessage		2:00:00 AM	
4	Out Of The Box Policy Opportunity	Opportunity		2:00:00 AM	
5	Out Of The Box Policy Task	Task		2:00:00 AM	

- 3. Click **Edit**. Enter you details.

View Out of the box policy Account

Details

Preview Table

Policy Information

* Policy Name

Out of the box policy Account

Description

Default archiving policy for object Account

Enabled

☒

Schedule Policy (UTC)

* Every...

Day

* At

02:00 AM

Your policy runs every day at 18:00 according to your salesforce instance timezone

Query Details

* Archive SObject

Account

Query

Manual

* SOQL Query

SELECT id FROM Account WHERE CreatedDate < LAST_N_months:3 limit 100

☐ Lookup relations archiving

☒ Archive related content documents

> Retention Policy

Estimate

Run Now

Edit

Cancel

NOTE

Only sObjects that can be deleted are visible in the drop-down menu. You must enable the policy.

- Click **Save**.

Own{backup}

Pre-defined Policy

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Creating a New Archiving Policy



NOTE

This is the policy version you will see if you have checked the **New and improved Policy Configuration window** checkbox in the Archive Settings.



NOTE

When the login user configures the policy, it is executed with the permissions of the dedicated integration user specified in the Archive account settings. The ability to establish policies, and the preview results displayed will vary depending on the permissions of the login user.

1. Navigate to the Policies tab.
2. Click **New**. The New Policy window opens.



NOTE

Right clicking the policies no longer opens a new tab.

3. In the Policy Information section, enter values in the following fields:

New Archiving Policy

Details
Preview Table

Policy Information

* Policy Name

Description

Enabled ☒

Schedule Policy (UTC)

* Every...

* On

* At

Your policy runs on the 31 of every month at 16:00 according to your salesforce instance timezone

Query Details

* Archive SObject

Query

* SOQL Query

☐ Lookup relations archiving ⓘ

☐ Archive related content documents

Retention Policy

Years

Month

Save
Cancel

- a. **Policy Name:** Enter an identifiable name. (e.g. Inactive Cases Opened 2 Years Ago).
- b. **Description:** Include a Policy Description.
- c. **Enabled:** When set to off, policy scheduled execution is prevented.
- d. **Schedule Policy (UTC):** Schedule the frequency to run the policy (Daily/ Weekly / Monthly). If applicable, additional options are displayed.
 - All dates and hours are in UTC, make sure to adjust the time according to your time zone.
 - When selecting Day, you are prompted for the Hour.
 - When selecting Week you are prompted for the day of the week (Sunday-Saturday) and then the Hour.
 - When selecting Month you are prompted for the day of the month and then the Hour.



NOTE

You can also select the policy to run on the last day of the month.

4. In the Query Details section, you can run a query based on a list of objects in your org, and filter which records to archive.
 - **Archived SObject:** A list of objects in your org. Select any standard or custom object in the list. The selected object and all its related objects will be archived.
 - Filtering the Records to Archive:
 - Select by filter from the drop-down list under the Query section.
 - Set the limit of records.
 - Select the applicable option from the Take Action When drop-down list:
 - **All conditions are met:** Select this option when all the conditions in the condition builder should exist (similar to “AND” between conditions).
 - **Any condition is met :** Choose this option when at least one of the conditions in the condition builder should exist (similar to “OR” between conditions).
 - Select an object from the Field drop-down list.



NOTE

When you select a date field type object, for example, CreatedDate or LastModifiedDate, additional options appear as follows:

- a. Select one of the arguments from the Operator drop-down list.
 - b. Enter a value to select the date that this field should be older than.
 - c. Set a scale (years, months, days) from the Date Category drop-down list.
 - d. Continue to [Add Condition \[32\]](#).
- Select one of the arguments from the Operator drop-down list. Dependent on the selected field's type, the applicable operator will appear (=, >, <, Start with, End with, etc).
 - Select the value you wish to filter by the results from the Value drop-down list.
 - Click **Add Condition** to add an additional condition in the condition builder for more complex conditions.
 - **Reset Query:** Will clear all the conditions built so far and allow you to start over.
 - **Delete:** Will delete the reference condition
 - **SOQL Query:** Customize the SOQL query and create your own complex query.



NOTE

The SOQL Query is changed automatically by the condition builder and the fields selection when previewing the archived records.



NOTE

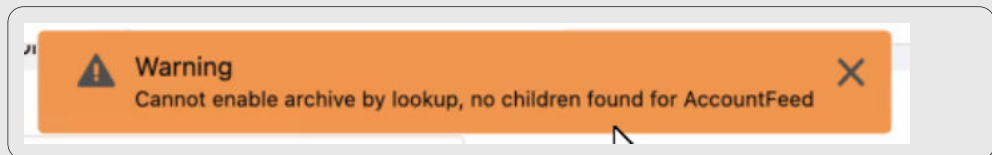
You can use a handy query to archive records according to criteria in the parent object (Master detail). For example, if you want to archive all tasks where the parent cases are in status=close. **Select Id From Task Where WhatId IN (Select id from Case where status ='On Hold') LIMIT 10** This can be applied to all objects.

Lookup Relations Archiving: Once you select an Archive sObject, you can archive child objects under the selected object.



NOTE

This is only available if there is a relation to lookup from child to parent, if not, an error message related to that object appears:



5. Advanced: See [Advanced Settings \[22\]](#).
6. Click **Save**.

Purge Policy

With Purge Policy, we have made it easier for you to ensure compliance with the removal of data. You can now define policies that will bypass the original expiration date that was determined at the time the data was archived, and permanently delete the data. Policies can run on-demand or on a regular cadence, and can only be administered through a special permission set. On the activity screen, you can view Purge Policy in the Activities log and download a CSV file with a list of the records that have been purged.

Purge Policy

In order to enable the Purge Policy you must have package 12.3. You can either update the package or reinstall the package.



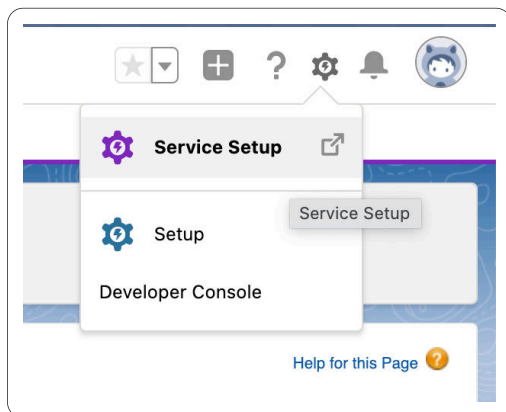
NOTE

From 11.53 the package will be carried over. If you set a specific permission to Purge you will lose the Archiving Policy permissions. The admin must set the permissions in Salesforce for Archive Admin or assign both the Purge and Archive policies.

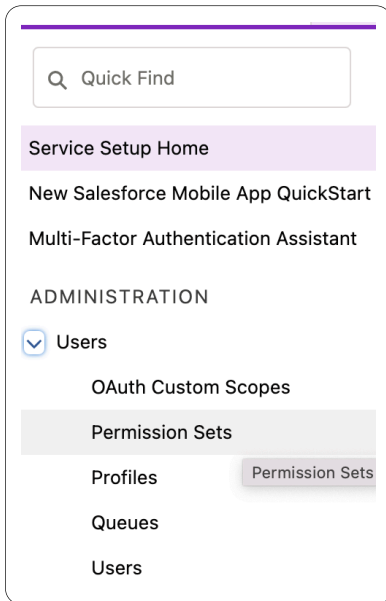
Setting up Purge Policy

Archive provides you with the ability to choose your settings.

1. Navigate to the Service Setup and click **Setup**.



2. Click on the Users tab.



3. Select **Permission Sets**.



NOTE

You can also type in Permission Sets in the Quick Find.

4. The Permission Sets page appears.

Permission Sets Help for this Page

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label	Description	License
Clone	ActionPlans		Action Plans
Clone	Analytics View Only User	User permissions for View-only licensed apps.	Analytics View Only Embedded App
Clone	Archive Activities	User gain access to the activities tab.	
Clone	Archive Admin	Provides the capability to manage archiving policies in the OwnBa...	
Clone	Archive Enable Export	Provides the capability to export records the OwnBackup Archiver ...	
Clone	Archive Enable Unarchive	Provides the capability to unarchive records the OwnBackup Archi...	
Clone	Archive FLS	User has access to firs report tab to run firs report.	
Clone	Archive Global Search	Provides access to the Global Search feature in the OwnBackup ...	
Clone	Archive Home Page	Permission set for accessing home page	
Clone	Archive Legal Hold Admin	Provide access to perform legal hold, unhold, search and export o...	
Clone	Archive Legal Hold Table	Provide permission only to legal hold table (legal hold report)	Salesforce
Clone	Archive Policy Permission		
Clone	Archive Purge Policy Permission		
Clone	Archive Settings	Allow user to open Archive settings.	
Clone	Archive View Archived Records	Enable a user to view archived records in the VF page.	

1-25 of 44 | 0 Selected | [Previous](#) [Next](#) | Page 1 of 2



NOTE

Once the users receive the Purge Permission they must also be assigned with the Archive Policy Permission in order to continue using the Archive Policies.

5. Select Archive Purge Permission and assign it to the relevant users.



NOTE

Once records are deleted from Archive they are permanently deleted. You can no longer retrieve them. It is recommended to be selective with who gets the Purge Policy Permission.

New Purge Policy



NOTE

You must enable the New and improved Policy Configuration window feature in the settings. More information can be found in the Archive Classic and Archive Lightning Guides.

1. Navigate to the Policies tab and select **+New Policy**.



NOTE

Right clicking the policies no longer opens a new tab.

2. Select **Purge Policy**.

New Policy

Select Policy Record Type

Select a record type for the new policy. To skip this page in the future, change your record type settings on your personal setup page.

Select Policy Record Type

Record Type of new record

Archiving Policy

✓ Purge Policy

Continue

Cancel

Available Policy Record Types

Record Type Name	Description
Archiving Policy	
Purge Policy	

3. Click **Next**. The New Policy window opens.

New Policy

*

Policy Name

Description

Enabled

Query Details

*

Archive SObject

Select an Option

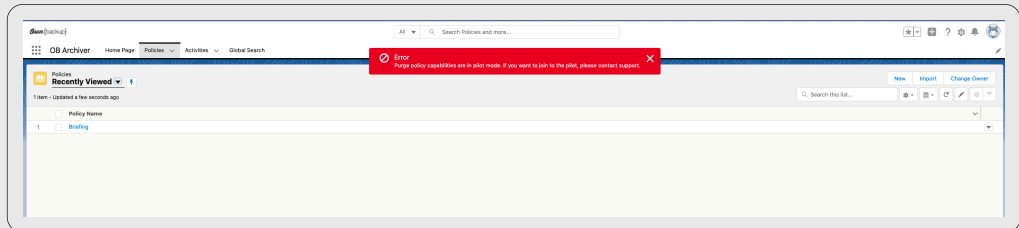
Save

Cancel



NOTE

If you get this message then purge policy has not been enabled. Please contact archiverpilots@ownbackup.com.



4. In the Policy Information section, enter values in the following fields:
 - a. **Policy Name:** Enter an identifiable name. (e.g. Inactive Cases Opened 2 Years Ago).
 - b. **Description:** Include a Policy Description.
 - c. **Enabled:** When set to off, policy scheduled execution is prevented.
5. Navigate to Query Details section.
6. Select an SObject from the drop-down menu.

We are showing root objects in the drop-down menu that have been archived. The child objects are included in the purge. If you archive a case with a task then you must purge the cases in order to purge all the tasks.

New Policy

Details

* Policy Name

Description

Enabled ☒

Query Details

* Archive SObject

* Field

* Operator

Value

7. Select the value in the Operator drop-down menu.



NOTE

If you want to add another field click on **+Add Condition**. You can delete all conditions by clicking Reset. If you want to delete one condition at a time click on the delete button in the same row. Be aware that if you save a purge query without a condition it will remove all archived records of that object.

8. Enter the Value. Click **Save**.



NOTE

It is recommended to set at least one condition. If you save a policy with no condition you will receive a warning.

Policy purge confirmation

Are you sure?

This policy is set to purge all the records of object Case and its related records (children and lookups archived with it). Are you sure you want to continue?



NOTE

Click **Policy** to edit your policy. Changes will take effect the next time the policy runs.

If the Purge Policy is enabled it will run on a daily basis together with other and previous Purge Policies. Records that are removed with the purge policy cannot be retrieved. Be careful with who has access.

Limitations

Purge Policy

- Records under legal hold cannot be purged.
- Numbers are treated as text. You can only select equal to.
- A custom field containing the word date is treated as a date field.
- It can take up until 24 hours to see a newly added fields.
- If you select multiple conditions then only records that meet all conditions will be purged.

Estimate

You can view the records in a policy that will be deleted.

1. Navigate to the Policy tab.
2. Select a policy to purge.
3. Click **Estimate**.

View New Test 11

Policy Information

* Policy Name

New Test 11

Description

Enabled

☒

Schedule Policy (UTC)

* Every...

Day

* At

02:00 AM

Your policy runs every day at 18:00 according to your salesforce instance timezone

Query Details

* Archive SOBJent

Estimate

Run Now

Edit

Cancel

4. Navigate to the Activities tab.
5. Navigate to the Execution Details tab and click **Download File**.
6. Open the file to view all records that will be purged with this policy.

Own{backup}

Estimate

40

Run Now

You can purge records immediately.



NOTE

By selecting this option all records in this policy are immediately purged and cannot be recovered.

1. Click **Run Now**.

View New Test 11

Policy Information

* Policy Name

New Test 11

Description

Enabled

☒

Schedule Policy (UTC)

* Every...

Day

* At

02:00 AM

Your policy runs every day at 18:00 according to your salesforce instance timezone

Query Details

* Archive SOblent

Estimate

Run Now

Edit

Cancel

2. A warning appears. Click **Confirm**.

Attention

You are about to execute this purge policy. This will immediately remove all records matching the conditions in this policy from Archive. Are you sure you want to continue?

Cancel

Confirm

Own{backup}

Run Now

41

Displaying Archived Data

Displaying Archived data on Object Record Layout

The OwnBackup Archive Lightning Web Component is available by default for the following standard objects: Accounts, Contacts, Cases, Opportunities & Leads.



NOTE

The recommended Height of the Archive Lightning Web Component should be between 400-600px.

If other objects are needed, see [Creating a Custom Archive Lightning Web Component](#).

Adding the Widget to Page Layout

1. Click
2. Select an object.
3. Click **Go!** to view all records of that object.

Action	Account Name	Billing State/Province	Phone	Type	Account Owner Alias
<input type="checkbox"/> Edit Del	Account1				It
<input type="checkbox"/> Edit Del	Account2				It
<input type="checkbox"/> Edit Del	Account3				It
<input type="checkbox"/> Edit Del	Account4				It
<input type="checkbox"/> Edit Del	Account5				It
<input type="checkbox"/> Edit Del	gdfatf				It
<input type="checkbox"/> Edit Del	Tamid				It

4. Select the desired record.

Account2

Customize Page | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Hide Feed](#) | [Click to add topics:](#)

[Post](#) | [File](#) | [New Task](#) | [More](#)

Write something... [Share](#) [Follow](#)

[Followers](#)

No followers.

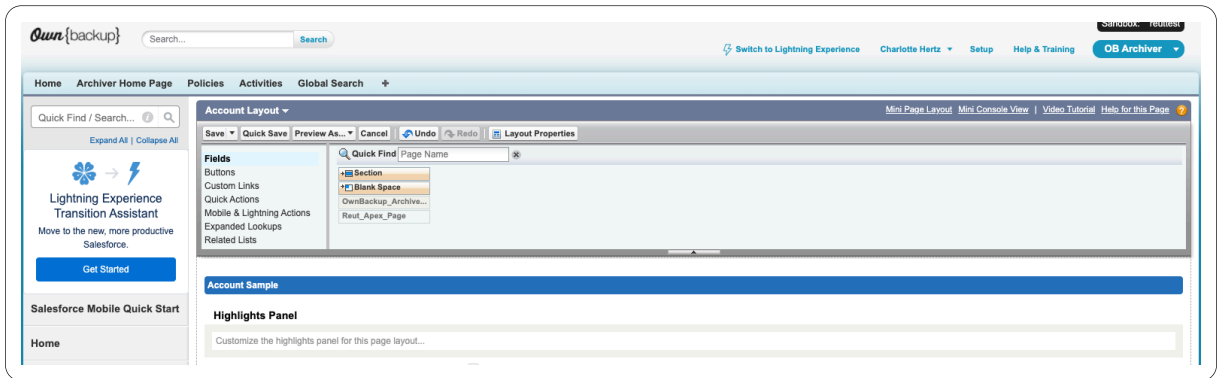
[Show All Updates](#)

There are no updates.

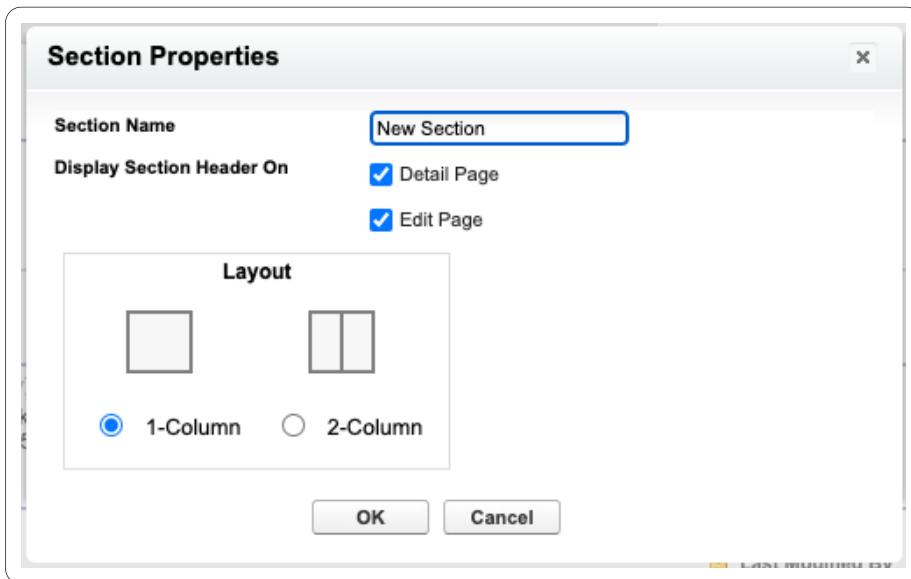
[Back to List: Accounts](#)

[Contacts \(0\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Opportunities \(2\)](#) | [Cases \(2\)](#) | [Partners \(0\)](#) | [Notes & Attachments \(1\)](#)

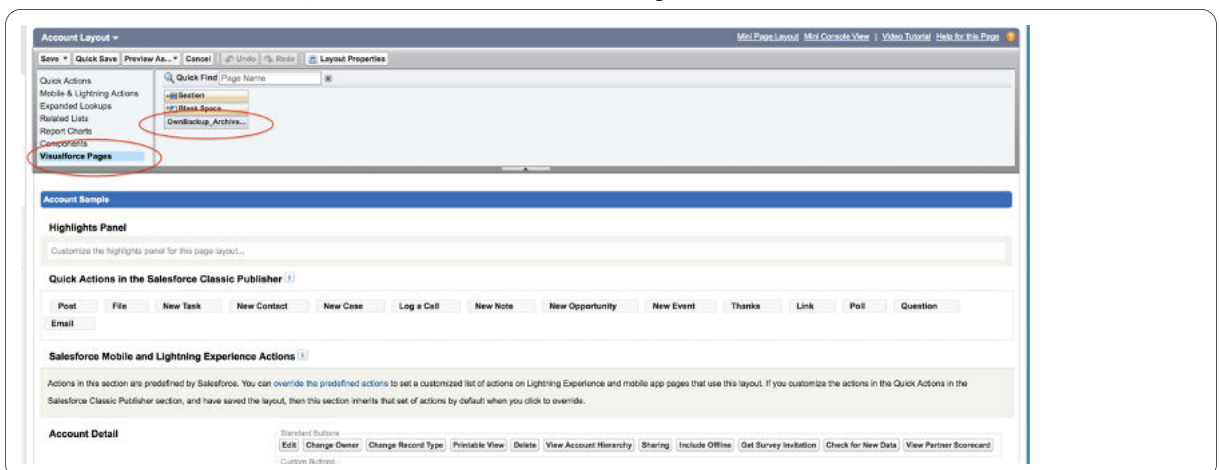
5. Click **Edit Layout**.
6. From the components options, in the Fields section, drag the Section to New Section.



7. Add a Section Name, and set the Section Properties.




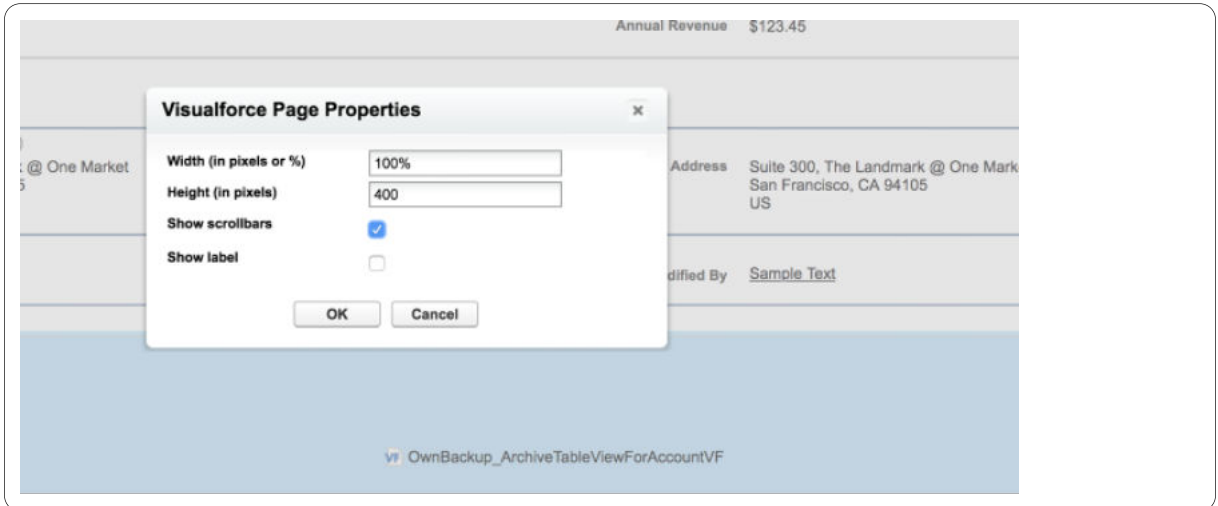
8. Click **OK**.
9. From the components options, select Visualforce Pages.



10. Drag the OwnBackup page to the New Section.




- Click the Visualforce page properties button , set the Height (in pixels) to 400, and select the Show scrollbars checkbox.

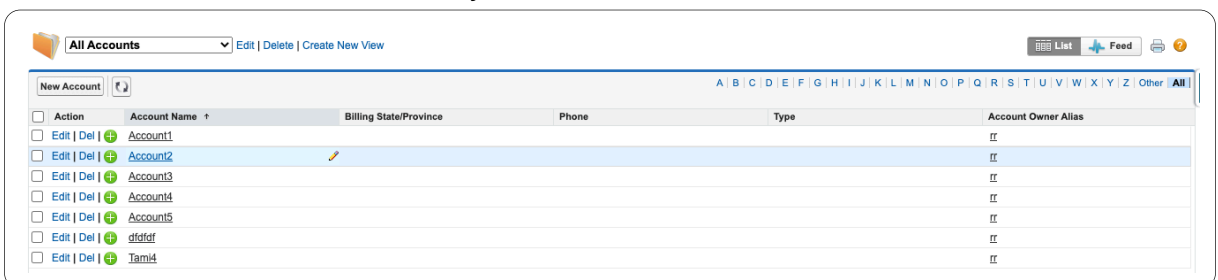


- Click **OK**.
- Click **Save**.

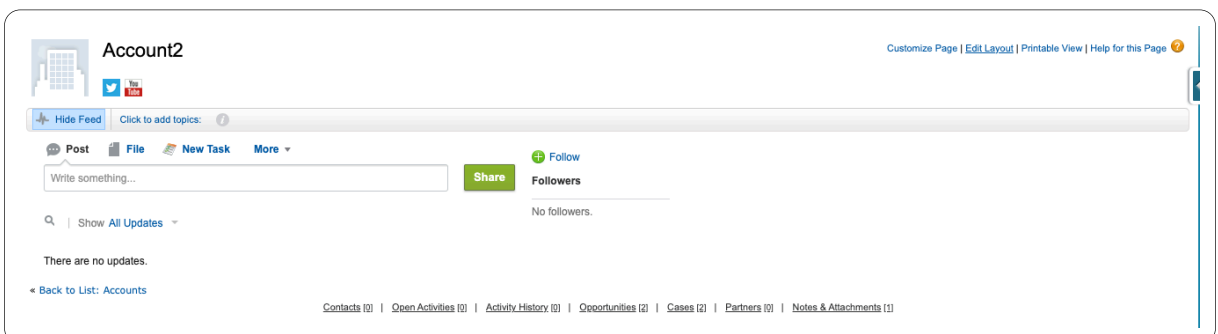
Search Widget

You can view archived records from within a Salesforce Object.

- Click .
- Select an object.
- Click **Go!** to view all records of that object.



- Select the desired record.



5. Scroll through the record page to find the added widget.
6. Select an object from the drop-down list.

The results are displayed as follows:

▼ Archive Records				
Archived records				
<div>Case</div> <div></div>				
Account ID	Case Number	Contact Email	Contact ID	Actions
Account1	00001130		Name1 LastName1	

You can view, unarchive or export a specific record by clicking the relevant icon on the relevant record.

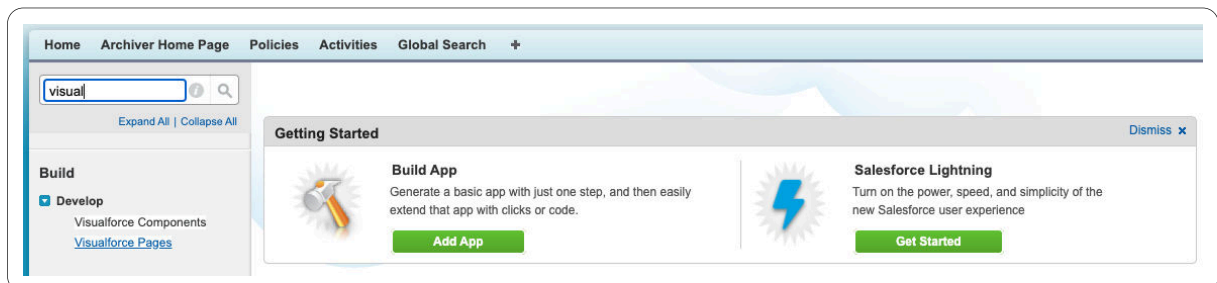
Creating a Custom Archive Visualforce Component



NOTE

These steps are only required if you need to create a widget for the objects that are not included with the managed package. If irrelevant to your setup, you may skip this step.

1. At the top-right of the page, navigate to Setup.



2. Filter by typing "Visualforce Pages" in the Quick Find.

Visualforce Pages									
Visualforce Pages provide a robust and easy to use mechanism to create new and exciting user experiences for your application or to enhance existing applications to optimize your users' productivity.									
View: All Create New View									
<div> <div>Developer Console</div> <div>New</div> </div>									
Action	Label ↑	Name	Namespace Prefix	Api Version	Description	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
Edit Del Security Help	AnswersHome	AnswersHome		50.0	Default Lightning Platform home page for Answers sites	Avakn	12/2/2020 11:58 PM	Avakn	12/2/2020 11:58 PM
Security Help	ArchivedAccounts	ArchivedAccounts	OB_Archiver	48.0		Avakn	10/29/2020 2:30 AM	Avakn	5/31/2021 9:31 AM
Edit Del Security Help	BandwidthExceeded	BandwidthExceeded		50.0	Default Lightning Platform Limit Exceeded page	Avakn	12/2/2020 11:58 PM	Avakn	12/2/2020 11:58 PM
Edit Del Security Help	ChangePassword	ChangePassword		50.0	Default Salesforce Sites Change Password page	Avakn	12/2/2020 11:58 PM	Avakn	12/2/2020 11:58 PM
Edit Del Security Help	CommunitiesLanding	CommunitiesLanding		50.0	Default communities landing page	Avakn	12/2/2020 11:58 PM	Avakn	12/2/2020 11:58 PM
Edit Del Security Help	CommunitiesLogin	CommunitiesLogin		50.0	Default communities login page	Avakn	12/2/2020 11:58 PM	Avakn	12/2/2020 11:58 PM
Edit Del Security Help	CommunitiesSelfReg	CommunitiesSelfReg		50.0	Default communities self registration page	Avakn	12/2/2020 11:58 PM	Avakn	12/2/2020 11:58 PM

3. Click **New**.

Visualforce Page Help for this Page

Page Edit Save Quick Save Cancel Where is this used? Component Reference Preview

Page Information ! = Required Information

Label

Name

Description

Available for Lightning Experience, Experience Builder sites, and the mobile app ☐

Require CSRF protection on GET requests ☐

Visualforce Markup **Version Settings**

```

1 <apex:page>
2 <!-- Begin Default Content REMOVE THIS -->
3 <h1>Congratulations</h1>
4 This is your new Page
5 <!-- End Default Content REMOVE THIS -->
6 </apex:page>

```

- In the Page Information section, create a new Visualforce page, and name it appropriately to reference the specific object (with no spaces).
- In the Visual Markup section, insert the following code into the body:


```

<apex:page showHeader="false" standardController="Account" docType="html-5.0" >
<OB_Archiver:SearchResultWidget recordId="{!Account.Id}" object="Account" >
</OB_Archiver:SearchResultWidget>
</apex:page>

```

Name	Type	Description	Required
recordId	Id	Id of the parent object	!
object	String	Name of the parent object	!
defaultChildObject	String	Name of the default child object	Optional

- Replace the marked parentObject to be the object of the Visualforce page.
- Click **Save**.
- Return to [Adding the Widget to Page Layout \[42\]](#) to add the newly created widget to the page layout.

Activities Log

All Archive activities are displayed in the Activities log.



NOTE

You can now add the API Usage field in the Activities table.

Activities Edit Delete Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Archiving Policy	SubjectName	Status	Progress	Action Type +	Primary Records	Total Records Atte...	Records failed to c...	Start Date	End
<input type="checkbox"/> Edit Del	New Test 11	Account	Ended	<div></div>	Estimate	10	10	0	12/27/2021, 6:07 AM	12/27/2021, 6:07 AM
<input type="checkbox"/> Edit Del	New Test 11	Account	No records	<div></div>	Estimate	0	0	0	1/26/2022, 12:31 PM	1/26/2022, 12:31 PM
<input type="checkbox"/> Edit Del		Case	Ended	<div></div>	Export	3	3	0	11/23/2021, 6:13 AM	11/23/2021, 6:13 AM
<input type="checkbox"/> Edit Del		Case	No records	<div></div>	Export	0	0	0	11/23/2021, 6:30 AM	11/23/2021, 6:30 AM
<input type="checkbox"/> Edit Del		Case	Ended	<div></div>	Export	3	3	0	11/23/2021, 6:37 AM	11/23/2021, 6:37 AM
<input type="checkbox"/> Edit Del		Case	Ended	<div></div>	Export	3	3	0	11/23/2021, 6:55 AM	11/23/2021, 6:55 AM
<input type="checkbox"/> Edit Del		General	Ended	<div></div>	Export	141	141	0	11/23/2021, 11:04 PM	11/23/2021, 11:04 PM
<input type="checkbox"/> Edit Del		General	Ended	<div></div>	Export	27	27	0	11/24/2021, 3:52 AM	11/24/2021, 3:52 AM
<input type="checkbox"/> Edit Del		General	Ended	<div></div>	Export	27	27	0	11/24/2021, 4:48 AM	11/24/2021, 4:48 AM
<input type="checkbox"/> Edit Del		General	Ended	<div></div>	Export	234	234	0	11/24/2021, 8:46 AM	11/24/2021, 8:46 AM
<input type="checkbox"/> Edit Del		Account	Ended	<div></div>	Export	1	1	0	1/26/2022, 8:26 AM	1/26/2022, 8:26 AM
<input type="checkbox"/> Edit Del	cases	Case	Ended	<div></div>	Archive	50	150	0	11/22/2021, 1:36 PM	11/22/2021, 1:36 PM
<input type="checkbox"/> Edit Del	cases	Case	No records	<div></div>	Archive	0	0	0	11/22/2021, 6:00 PM	11/22/2021, 6:00 PM
<input type="checkbox"/> Edit Del	cases	Case	No records	<div></div>	Archive	0	0	0	11/23/2021, 6:00 PM	11/23/2021, 6:00 PM
<input type="checkbox"/> Edit Del	Email messages	EmailMessage	Ended	<div></div>	Archive	10	40	0	11/24/2021, 1:24 AM	11/24/2021, 1:24 AM
<input type="checkbox"/> Edit Del	not new cases	Case	Ended	<div></div>	Archive	10	30	0	11/24/2021, 3:09 AM	11/24/2021, 3:09 AM
<input type="checkbox"/> Edit Del	not new cases	Case	Ended	<div></div>	Archive	5	55	0	11/24/2021, 3:23 AM	11/24/2021, 3:23 AM
<input type="checkbox"/> Edit Del	case to purge	Case	Ended	<div></div>	Archive	3	11	0	11/24/2021, 6:26 AM	11/24/2021, 6:26 AM
<input type="checkbox"/> Edit Del	cases	Case	Ended	<div></div>	Archive	37	111	3	11/24/2021, 6:00 PM	11/24/2021, 6:00 PM
<input type="checkbox"/> Edit Del	cases	Case	No records	<div></div>	Archive	0	0	0	11/25/2021, 6:00 PM	11/25/2021, 6:00 PM

1-25 of 136 0 Selected Previous Next Page 1 of 6

Activities List Filter



NOTE

In order to use the filter option you must select activities from the List View.

1. Navigate to the Filter button on the top right hand side. Click **Filter**.

Activities Activities

37 Items • Sorted by Archiving Policy • Filtered by All activities - Action Type • Updated 2 hours ago

Search this list...

Printable View

<input type="checkbox"/>	Archiving Policy ↑	SObject Name ↓	Status ↓	Progress ↓	Action Type ↓	Primary Records ↓	Total Records Attempted ↓	Records Failed ↓	Show filters
1	<input type="checkbox"/> case to purge	Case	Ended	<div>100%</div>	Archive	3	11	0	
2	<input type="checkbox"/> case to purge	Case	No records	<div>100%</div>	Archive	0	0	0	
3	<input type="checkbox"/> cases	Case	Ended	<div>100%</div>	Archive	50	150	0	
4	<input type="checkbox"/> cases	Case	No records	<div>100%</div>	Archive	0	0	0	

2. Click **Add Filter**.

OB Archiver

Home Page

Policies

Activities

Global Search

Activities

All Logs

New

Import

Change Owner

Printable View

50+ Items

Sorted by Activity Name

Filtered by All activities

Updated 2 minutes ago

Search this list...

Activity Name

API Usage

Start Date

End Date

Status

Progress

Archiving Policy

ObjectName

Filters

1	<input type="checkbox"/>	AL-29005		3/24/2021 2:08 PM	3/24/2021 2:08 PM	Ended	<div></div>	auto ci test policy d...	Lead
2	<input type="checkbox"/>	AL-29006		3/24/2021 2:08 PM	3/24/2021 2:08 PM	Ended	<div></div>		Lead
3	<input type="checkbox"/>	AL-29007		3/24/2021 2:09 PM	3/24/2021 2:09 PM	Ended	<div></div>	auto ci test policy 11...	Lead
4	<input type="checkbox"/>	AL-29008		3/24/2021 2:09 PM	3/24/2021 2:09 PM	Ended	<div></div>		Lead
5	<input type="checkbox"/>	AL-29009		3/24/2021 2:09 PM	3/24/2021 2:09 PM	No records	<div></div>	auto ci test policy 5...	Lead
6	<input type="checkbox"/>	AL-29010		3/24/2021 2:10 PM	3/24/2021 2:10 PM	Ended	<div></div>	auto ci test policy aa...	Attachment
7	<input type="checkbox"/>	AL-29011		3/24/2021 2:10 PM	3/24/2021 2:10 PM	Ended	<div></div>		Attachment

Filter by Owner

All activities

Add Filter

Remove All

3. Select a Value.

Activities

Activities

Printable View

50+ Items

Sorted by Archiving Policy

Filtered by All activities

Updated 24 minutes ago

Search this list...

Archiving Policy

ObjectName

Status

Progress

Action Type

Primary Records

Filters

1	<input type="checkbox"/>		Case	Ended	<div></div>	
2	<input type="checkbox"/>		Case	Ended	<div></div>	
3	<input type="checkbox"/>		Case	Ended	<div></div>	
4	<input type="checkbox"/>		Case	No records	<div></div>	
5	<input type="checkbox"/>		Case	Ended	<div></div>	
6	<input type="checkbox"/>		Case	Ended	<div></div>	
7	<input type="checkbox"/>		Case	Ended	<div></div>	
8	<input type="checkbox"/>		Case	Ended	<div></div>	
9	<input type="checkbox"/>		Case	Ended	<div></div>	
10	<input type="checkbox"/>		General	Ended	<div></div>	
11	<input type="checkbox"/>		General	Ended	<div></div>	

Archive

Unarchive

Export

Export-to-external-bucket

Export-and-download

0 options selected

Done

Filter by Owner

All activities

Matching all of these filters

New Filter*

Add Filter

Remove All

Add Filter Logic



NOTE

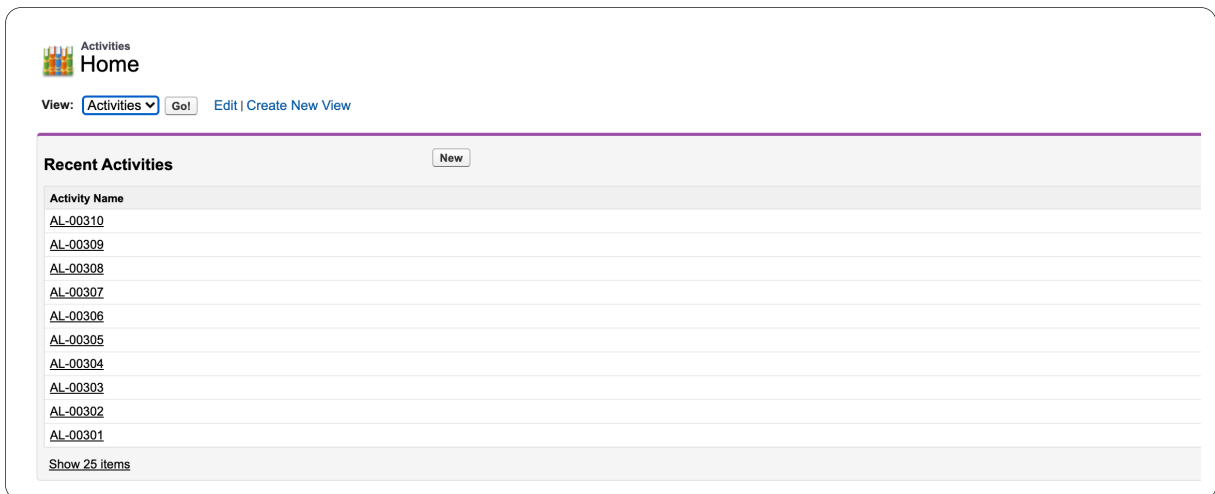
You can only select a value when Action Type is selected. If you installed version 11.53 and above and you do not see more than two or three options in the value drop-down menu you need to navigate back to the Service Setup in Salesforce and add the additional value options.

Undoing an Archive Operation

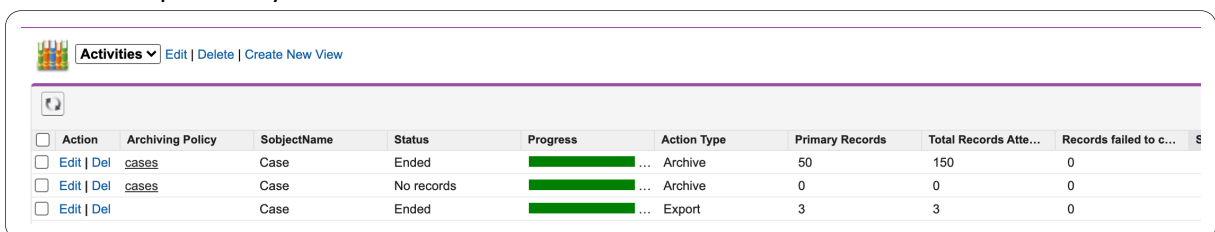
Admins can revert any completed Archive operation from the archived log and restore the archived records back into Salesforce.

To undo an Archive operation:

1. Navigate to the Activities tab.
2. Click **Go!** to view All Logs.

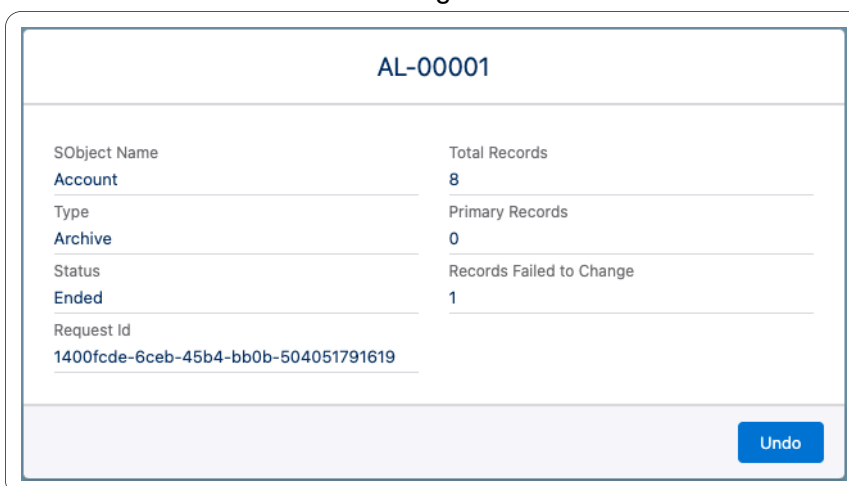


3. Locate the operation you want to undo.



Action	Archiving Policy	SubjectName	Status	Progress	Action Type	Primary Records	Total Records Attended	Records failed to change
<input type="checkbox"/> Edit Del	cases	Case	Ended	<div></div>	Archive	50	150	0
<input type="checkbox"/> Edit Del	cases	Case	No records	<div></div>	Archive	0	0	0
<input type="checkbox"/> Edit Del		Case	Ended	<div></div>	Export	3	3	0

4. Click **Edit** to access the Archive Log.



AL-00001

SObject Name	Total Records
Account	8
Type	Primary Records
Archive	0
Status	Records Failed to Change
Ended	1
Request Id	
1400fcde-6ceb-45b4-bb0b-504051791619	

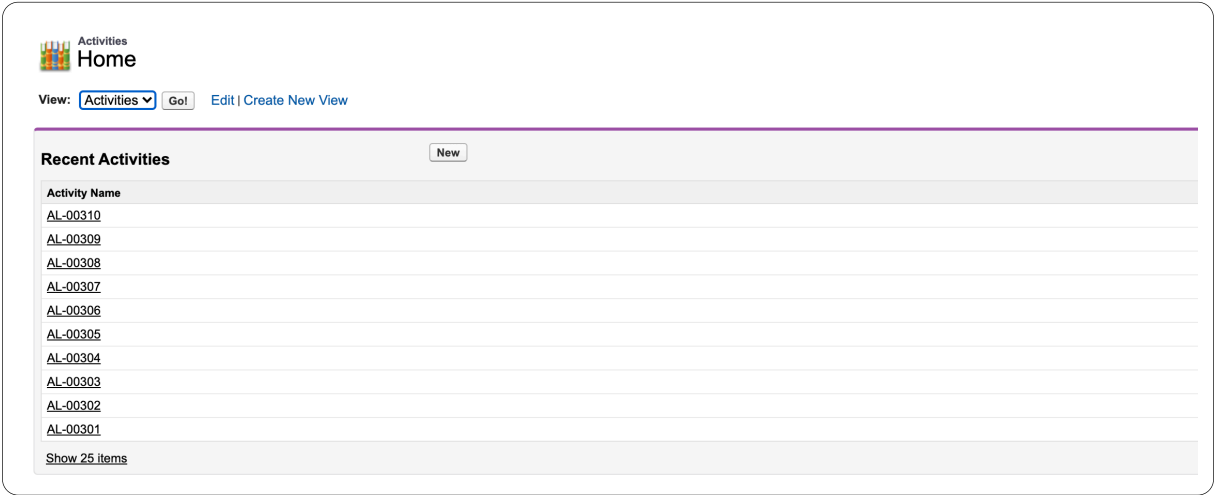
Undo

5. Click **Undo** to restore the archived records from that log back into Salesforce.

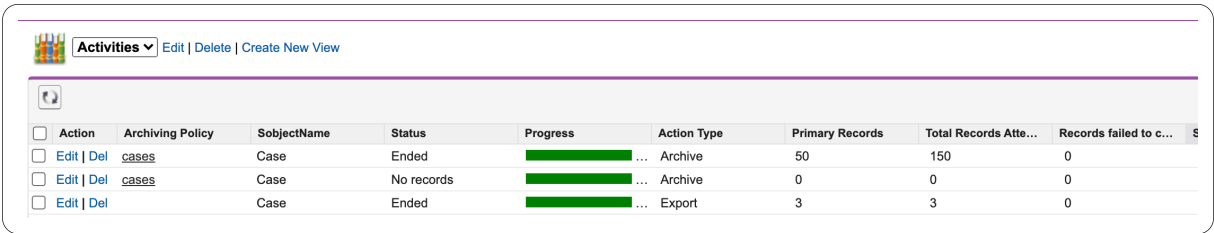
Deleting an Archive

To delete an Archive operation:

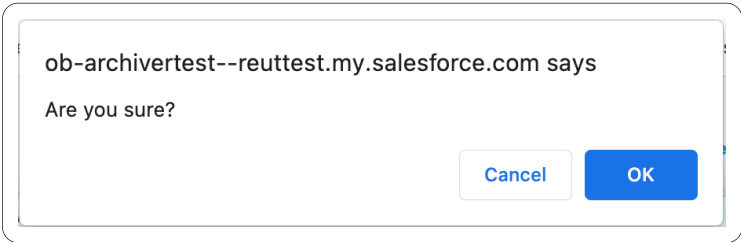
- 1. Navigate to the Activities tab.
- 2. Click **Go!** to view All Logs.



- 3. Locate the operation you want to delete, and Click **Delete**.



You are prompted to accept you want to delete the archive.



- 4. Click **OK**.

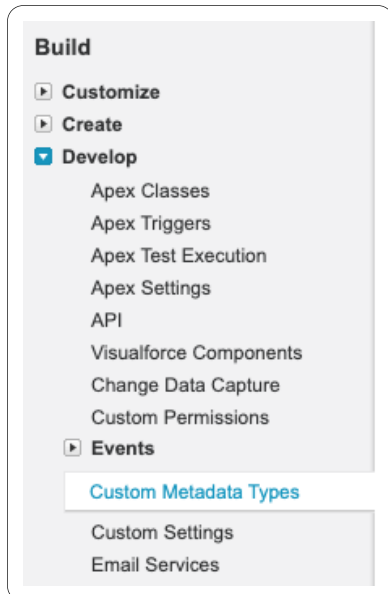
Hard/Soft Delete

Depending on the configuration options made in the Archive policy settings the archive will be either Hard or Soft deleted. The default, and recommended setting is soft delete.

- Hard delete removes the record from Archive permanently.
- Soft delete removes the record from the Archive list only.

To enable hard delete:

1. At the top-right of the page, navigate to Setup.
2. On the left-hand menu, in the Build section, select the Develop drop-down menu.



3. Select **Custom Metadata Types**.

All Custom Metadata Types [Help for this Page](#)

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that need to be migrated from one environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that comes with metadata: package, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

Action	Label	Installed Package	Namespace Prefix	Visibility	API Name	Record Size	Description
Manage Records	ArchiveSetting	Archive	OB_Archiver	Public	OB_Archiver__ArchiveSetting__mdt	406	
Manage Records	Archive_policy_settings	Archive	OB_Archiver	Public	OB_Archiver__Archiver_policy_settings__mdt	151	

4. Select **Archiver_policy_settings**.

Custom Metadata Type **Archive_policy_settings (Managed)** [Help for this Page](#)

[This custom metadata type is managed. You can only edit certain attributes. \[Display More Information\]\(#\)](#)

[Standard Fields \(6\)](#) | [Custom Fields \(1\)](#) | [Validation Rules \(0\)](#) | [Page Layouts \(1\)](#)

Custom Metadata Type Detail [Edit](#) [Manage Archive_policy_settings](#)

Singular Label		Description	
Plural Label	Archive_policy_settings	Visibility	Public
Object Name	Archiver_policy_settings	Protection Level	
Namespace Prefix	OB_Archiver	Record Size	151
API Name	OB_Archiver__Archiver_policy_settings__mdt		
Created By	Adi Vaknin, 9/19/2021, 10:44 AM	Modified By	Roni Cohen, 4/4/2022, 12:25 AM

Package Information

Installed Package	Available in Versions
Archive	10.14 - Current

5. Click **Manage Archiver_policy_settings**.

Archive_policy_settings [Help for this Page](#)

View: All [Create New View](#)

[New](#)

Action	Label	Archive_policy_settings Name	Namespace Prefix
Edit	Archive_policy_settings	Archiver_policy_settings	OB_Archiver

6. Click **Edit**.

Archive_policy_settings (Managed) [Help for this Page](#)

[This Archive_policy_settings is managed, meaning that you may only edit certain attributes. \[Display More Information\]\(#\)](#)

Archive_policy_settings Edit [Save](#) [Save & New](#) [Cancel](#)

Information ! = Required Information

Label	<input type="text" value="Archive policy settings"/>	Namespace Prefix	OB_Archiver
Archive_policy_settings Name	<input type="text" value="Archiver_policy_settings"/> i		
Enable hard delete	<input type="checkbox"/>		

[Save](#) [Save & New](#) [Cancel](#)

7. Select the **Enable hard delete** checkbox.

8. Click **Save**.

Unarchiving a Child Object

In a scenario when you have archived two objects a Parent and a child, for example an Account (parent) and a case (child), you can now successfully unarchive the case only. However, as the account no longer exists in Salesforce (because it remains archived in Archive), once unarchived, the case will no longer be connected to the Account. The case remains “orphaned”.

To enable this feature, open a ticket with Customer Support.

Unarchiving Email Messages

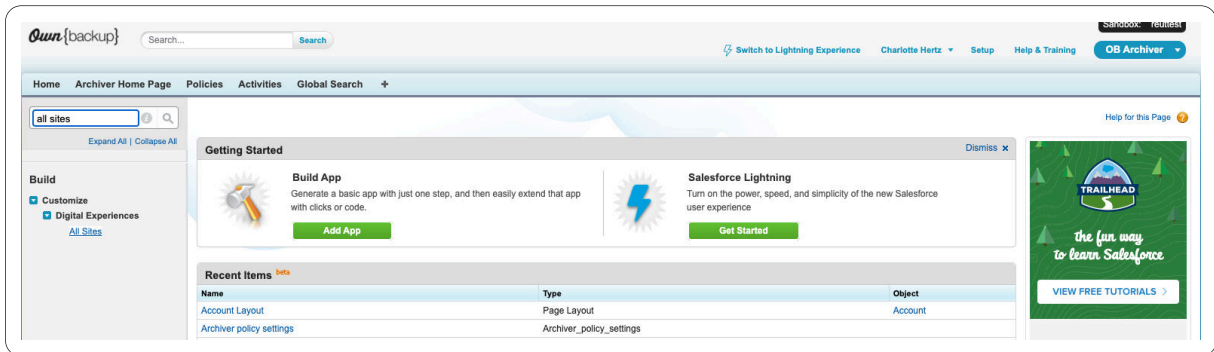
Email messages with attachments can be archived only when the draft email setting is enabled in Salesforce org.

Archiving in the Community Portal

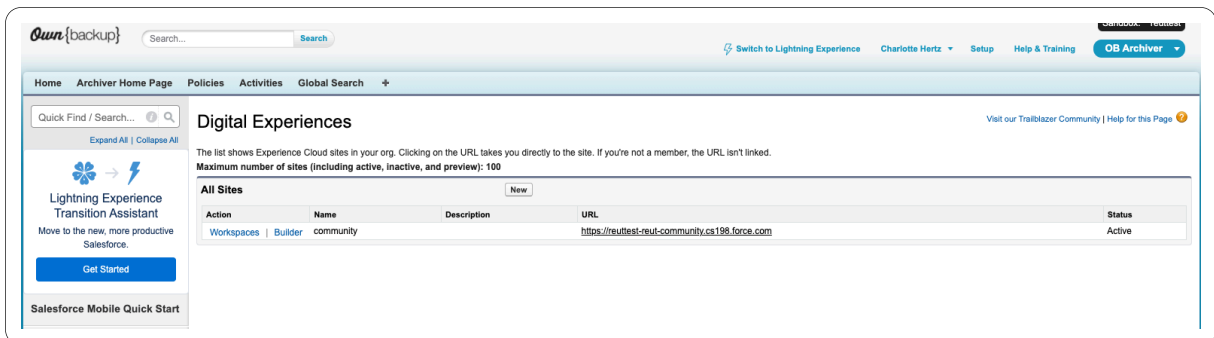
OwnBackup can now display Archived Records within Community Portals thanks to the upgrade of our Lightning Web Component making it compatible with Communities.

To set up Archive for Communities:

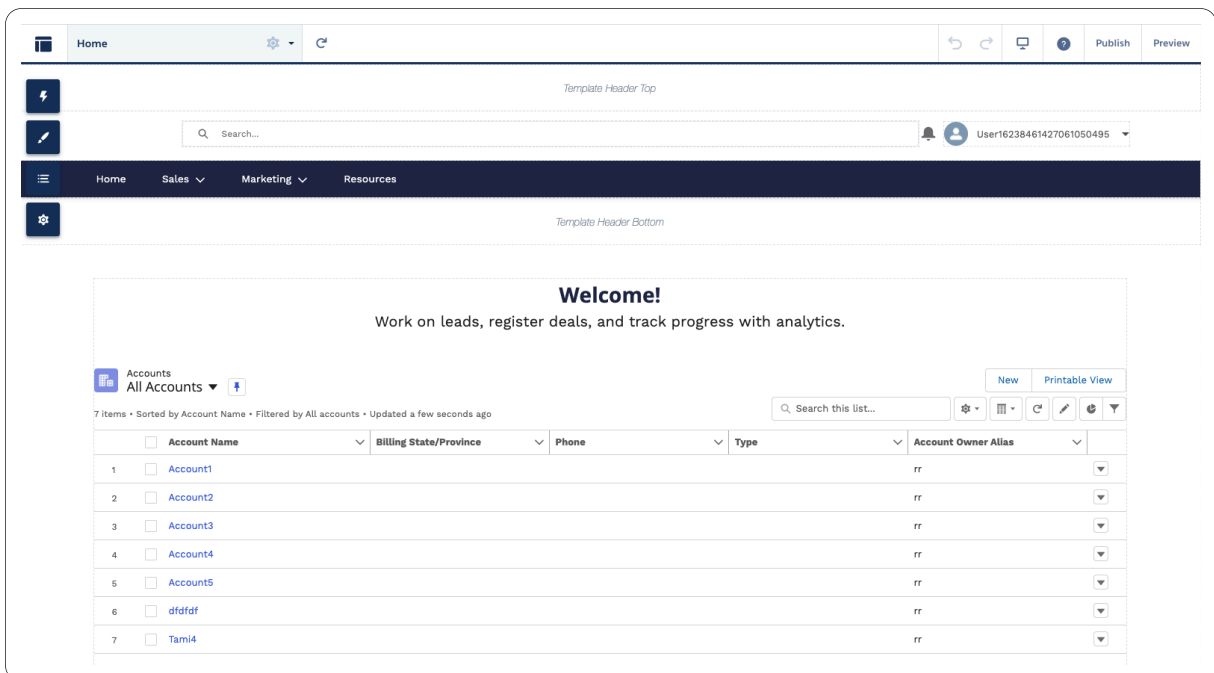
1. At the top-right of the page, navigate to Setup.



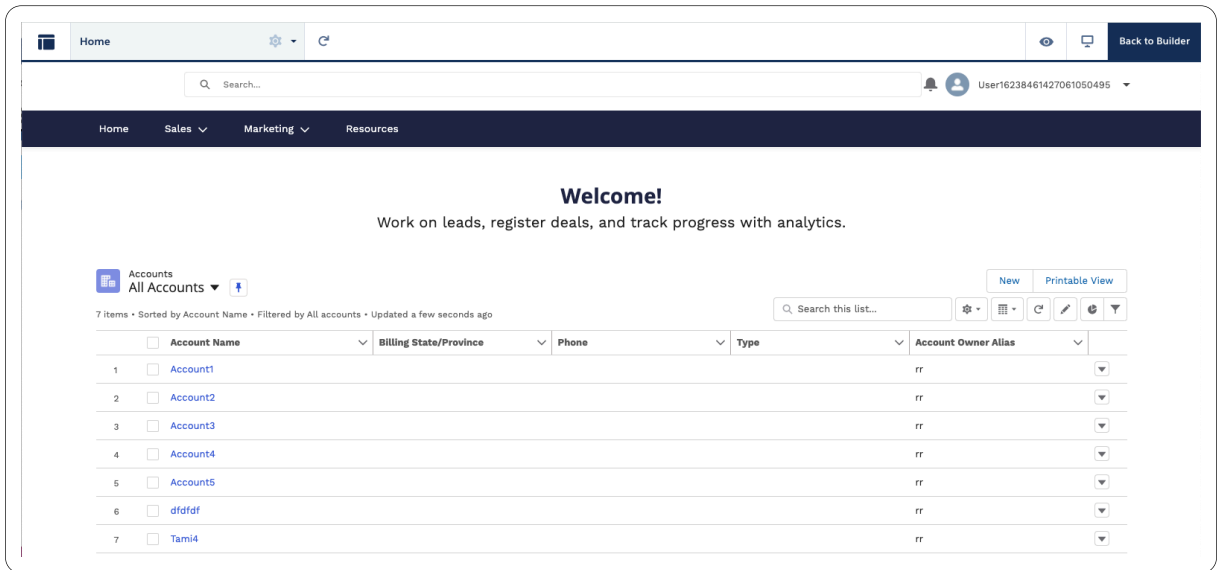
2. Filter by typing "All Sites" in the Quick Find.



3. Click **Builder** for the community you want to add the Archived Records LWC.

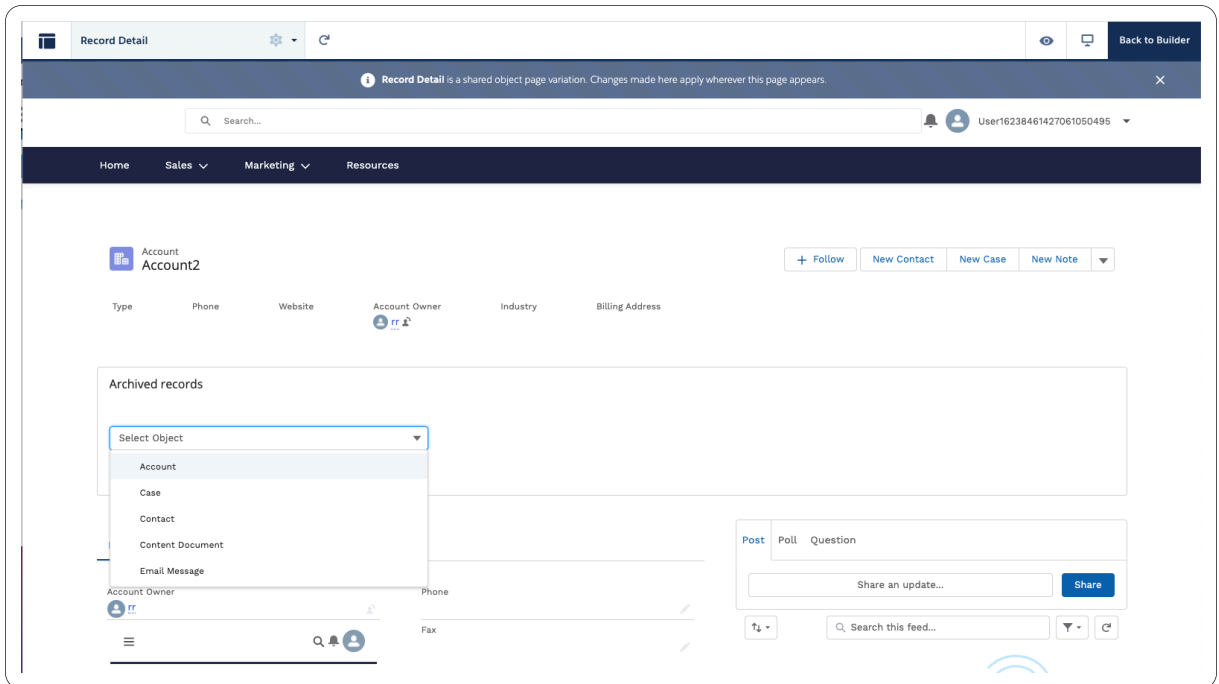


4. Click **Preview**.



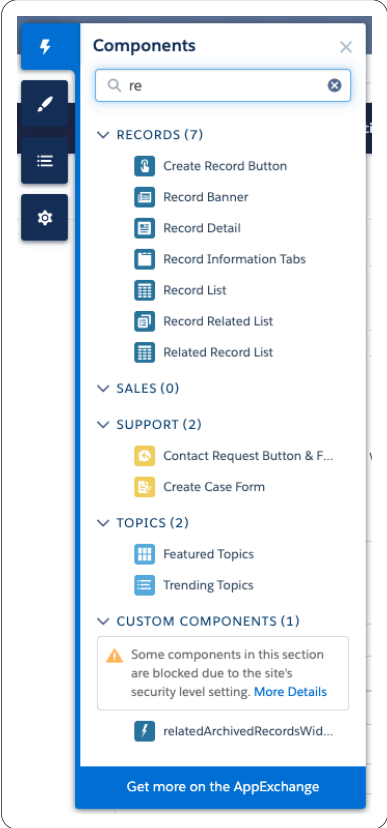
5. Select the relevant record.

6. In the Archived records section, select the desired object from the drop-down list.

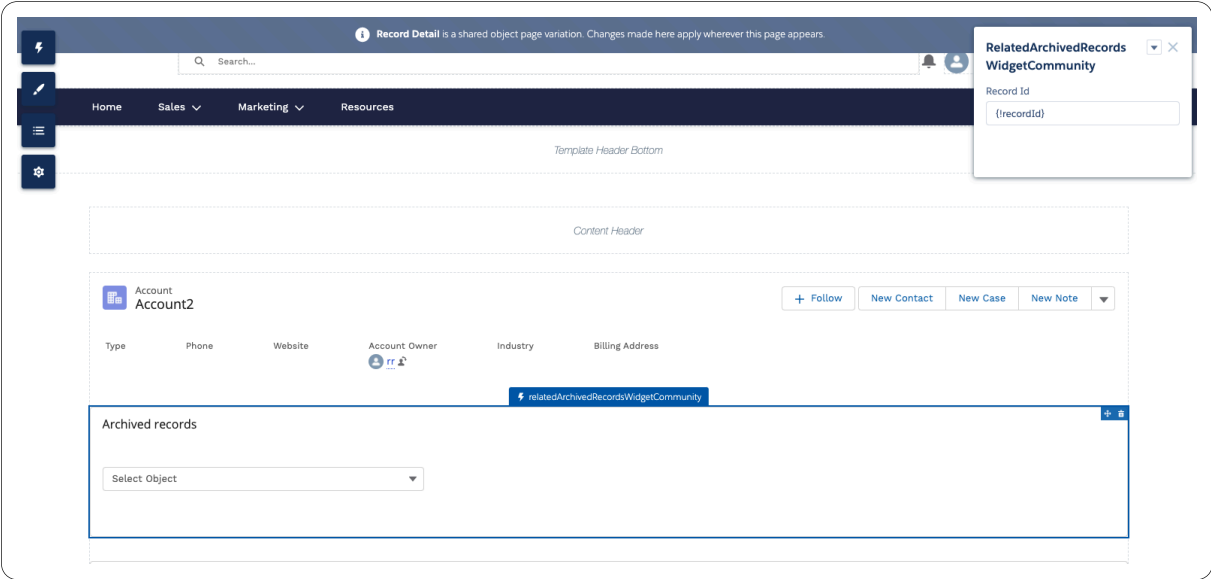


7. Click **Back to Builder**.

8. On left-hand side, under Custom Components, navigate to the Archive LWC.



9. Drag the Archive Widget into the Builder.















10. Click **Preview** to view how it will be displayed in the Community.

DetailRelatedArchived Records

relatedArchivedRecordsWidgetCommunity

Archived records

Case

Case Number	Subject	Status	Case Type	Actions
00151010	Approval Process Failed	Closed	Trial	  
00151015	Spare Parts Not Delivered	Closed	Sample Cases	  
00151016	Broken Glass	Closed	Sample Cases	  
00151018	Case Demo	Closed	Trial	  

Total Records: 4 Page: (1/1)

Global Search



NOTE

All users upgrading to the latest version release prior to 10.19 are automatically migrated to the advanced search capability in the Global Search. This migration may take time (up to several days) depending on the amount of files in the backup servers.

Global Search is intended for Admin, Legal and HR users.

Users granted access to Global search will have access to all records.

1. Click on the **Global Search** tab. The Global Search page opens.

2. Search the Archive base for any ID, text string: word, term, name, etc, or select the desired object from the drop-down list.



NOTE

If you search a specific field you must enter a term. Otherwise you will get an error message.

- You must have the “Archive Global Search” permission set on your org.



NOTE

“Archive Policy Definition” will provide permission to the Global Search automatically.



NOTE

Global Search provides read access to the entire archive, hence only Admins should have permission. The feature is controlled by the permission set: "Archive Global Search".

Currently, Global Search does not enforce Role Hierarchy, Sharing and Visibility rules. This must be considered in the rare scenario when adding this capability to standard users. We recommend Standard users use the [Archiver Widget](#).

- To refine the search by a date range, click **Add Date Range**. The date range refers to the record's created date.

The search considers the connections between Salesforce and Archive.

If necessary, enter the ID of an object stored in Salesforce to see all its 'children' that are in Archive.

- Click on the Date drop-down menu and select the desired time frame.

- Click the search icon . The results are displayed.

Archive Global Search
Search for a Salesforce id, specific object or enter free t...

Object: **Account** Field: **All** Term: [Remove Date Range](#)

Date: **Created Date** From Date: **Mar 31, 2022** To Date: **Apr 7, 2022**

Page 1 out of 1 - about 19 results

Accounts (19)

	Account Name	Account Phone	Owner ID	Billing City
1	Nathalia Marsh	685-771-7640	Adi Vaknin	156stAdmit.
2	Trisha Boone	939-704-8908	Adi Vaknin	
3	Nathalia Marsh	685-771-7640	Adi Vaknin	156stA not.
4	Trisha Boone	939-704-8908	Adi Vaknin	
5	Nathalia Marsh	685-771-7640	Adi Vaknin	156stFull.
6	account_name rChzKCKbYt		Shai Rubin	
7	Nathalia Marsh	685-771-7640	Adi Vaknin	344stTell.
8	Trisha Boone	939-704-8908	Adi Vaknin	
9	account_name cGNseLnUgf		Shai Rubin	



NOTE

Click the down arrow, the Case Number or Account ID to expand and drill down the search results. Exports may take time to complete.

- Click on the drop-down menu at the end of the row.
- Click on **View** or the case name. The record details are displayed.



NOTE

You can search more results for additional records. You can export or unarchive the record that you are viewing.

- Click on **Unarchive** to take out a record.
- Click on **Export** to download a CSV file.
- Navigate to the Activities to see your recent activity and download files.

Customizing the Preview Menu

- Click **Search layout** to customize the Search Results Preview.
- Configure the sObject and fields to display the search results.

Archive Search Settings

Search Layout Fields Configuration

sObjects
Account
AccountFeed
Asset
AssetHistory
Attachment
Case
CaseComment
CaseContactRole
CaseFeed

Account search layout ⓘ
Available fields

Selected fields (Maximum 15)

Account Description
Account Fax
Account ID
Account Source
Account Type
Annual Revenue
Billing Address
Billing Country
Billing Geocode Accuracy
Billing Latitude

Account Name 🔒
Account Phone
Owner ID
Billing City

3. Click **Save**.

Previewing a Content Document in Global Search

1. In the Global Search tab, select ContentDocument from the drop-down list.
2. To refine the search by a date range, click **Add Date Range**.
3. Click the search icon

Archiver Global Search
Records are searchable an hour after archive.

ContentDocument ▼

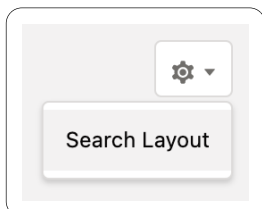
From Created Date:
Aug 14, 2019

To Created Date:
Aug 25, 2021

Content Document

Title	Created	Last Modified Date	File Type
sun	6/1/2021 3:44 AM	6/1/2021 3:44 AM	PNG
cake	6/1/2021 1:26 AM	6/1/2021 1:26 AM	JPEG
Archive_log_Case_37fda63c-5602-412e-a0bc-37d49d2c3a5f	11/5/2020 12:14 AM	11/5/2020 12:14 AM	CSV ▼
Archive_log_Account_ce731b77-fd58-4b4f-86e7-87d8f807e4eb	11/5/2020 12:13 AM	11/9/2020 7:23 AM	CSV ▼

4. If the File Type is displayed, continue to [select record \[64\]](#), if not, first complete the following steps:
 - a. Click the settings icon, and then click **Search layout**.



The Archive Search Settings window is displayed.

b. From the Available fields area, select File Type, and click the right arrow button . File Type will move over to the Selected fields area.

- Click **Save**.
- Continue to [select record \[64\]](#)

5. Select the record you wish to use.

The screenshot displays the 'Archiver Global Search' interface. At the top, there's a search bar with a dropdown menu set to 'ContentDocument'. To the right of the search bar is a text input field with the placeholder 'Search Archiver by Id or by free text' and a 'Remove Date range' link. Below the search bar, there are two date range selectors: 'From Created Date:' with a date of 'Aug 1, 2018' and 'To Created Date:' with a date of 'Aug 26, 2021'. A '< Back to search result' link is located below the date range selectors. The main content area is titled 'Content Document' and includes three action buttons: 'Download', 'Export', and 'Unarchive'. Below the title, there are two tabs: 'Detail' (selected) and 'Related'. Under the 'Detail' tab, there is a section titled 'ContentDocument Details' which lists the following information: 'Created By ID: Reut Amir, 11/5/2020, 06:14 PM GMT+2', 'Created: 11/5/2020 12:14 AM', and 'Last Modified By ID: Reut Amir, 11/5/2020, 06:14 PM GMT+2'.

6. Click **Preview** or **Download**.

The file downloads, or a preview of the file is shown on-screen.

The file types supported are:

- png
- gif
- jpeg
- word
- doc
- word_x
- docx
- pdf
- excel
- xls
- excel_x
- xlsx
- power_point
- ppt
- power_point_x
- pptx
- mp4
- mogv
- webm
- ogg

Global Search Rules

The following rules assume enhanced search is enabled. Customers who do not have the enhanced search enabled can only search by ID.

- Search is not case sensitive.
- Searching for a subset of a word/term is not supported. "Contains" is not supported.
- Email address: search is for the whole email address only.
- Regular expression searches are not supported. For example, search for "ab*c" will NOT results "ac", "abc", "abbc", "abbbc", etc.
- Boolean expression searches (OR, AND) are not supported. For example, A search for "solar eclipse", both search terms must be present to consider a match.
- Search by Content Document metadata: content document name, created date, owner etc. is not supported.
- Objects that are filtered out are not searched: Relation, History, Share, Feed.
- Global Search is limited to data that was archived 2 years ago.
- The first 1000 unique fields are indexed or searchable per customer. If you have over 1000 unique fields, the remainder will not be indexed or searchable.

Data Query SDK

This SDK allows you to imitate global search via code and get the set of results that match the request. Requests are synchronous and once the SDK is executed it returns a response. You should be cautious of the types of queries that you execute to avoid stalling the response for a long time or a session timeout. Each call returns up to 25 records with a pointer to the next set of results, if such exist.

The Global Search SDK allows you to search for archived records via software (rather than the widget or global search). This is useful if you want to use a custom layout to display archived records (instead of the Archive widget) or activate triggers and business rules also based on Archived data.

We recommend using the SDK with focused searches using filters to make the search as focused as possible so there will be a quick response and the results found will be reduced.



NOTE

Starting with package 13 you can also provide the list of fields you want returned with the search. It is an optional parameter so the SDK remains backward compatible with package 12. If you know which fields you need returned we recommend using this parameter for a more optimized search.

Right to be Forgotten

OwnBackup is committed to complying with the EU General Data Protection Regulation (GDPR) and helping our customers comply with "Right of Access", "Right to Rectification" and "Right to Forget" requests related to GDPR. This document provides information about the remediation process that OwnBackup Archive customers can use if they receive GDPR-related requests from EU Data Subjects and need to apply them to their OwnBackup archived record.

In Archive, you can configure the SDK to send a Delete request, also known as a right to be forgotten (RTBF) request, based on the following criteria:

- Record Type
- Field Name
- Value



NOTE

- Record Type and Field Name are not case sensitive.
- Value is case sensitive.




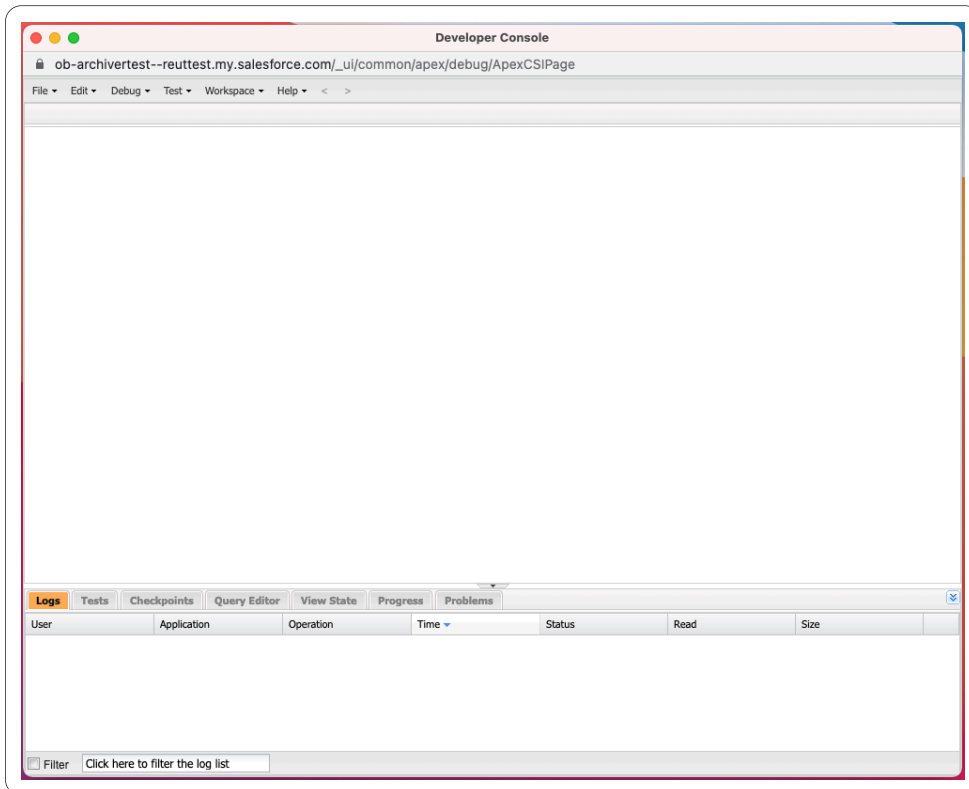
IMPORTANT

Archive does not support “Partial” delete, therefore if a child record fits one of the criteria, the whole archived record will be deleted.

Input	Output	Definition
<code>forgetArchivedRecords(list<Criteria> inputFilters)</code>	Return value: <code>ArchiverAccessorResponse</code>	<ul style="list-style-type: none"> • Public method that creates the “Forget” request to Archive. • Creates a list of criterias to delete. • Public method that creates a “Forget” request to Archive.
<code>Criteria(string subjectName, string fieldName, string value)</code>		
<code>ArchiverAccessorResponse</code>	<ul style="list-style-type: none"> • <code>ArchiverAccessorResponse.getBody()</code> ; • String, will contain the request id for follow up. • <code>ArchiverAccessorResponse.getStatusCode()</code> ; • <code>ArchiverAccessorResponse.getErrorMessage()</code> ; 	The response from the “Forget” API call, will return a request Id to track the status of the request using the “getRTBFStatus” method.
<code>getRTBFStatus(string requestId)</code>	A CSV report containing all the details of the information that will be deleted.	Public method that gives you the ability to follow up a RTBF request you made.

To manually test the SDK and run a RTBF request:

1. At the top-right of the page, click the Settings icon  to open the drop-down menu, and select Developer Console.
The Developer Console is displayed:



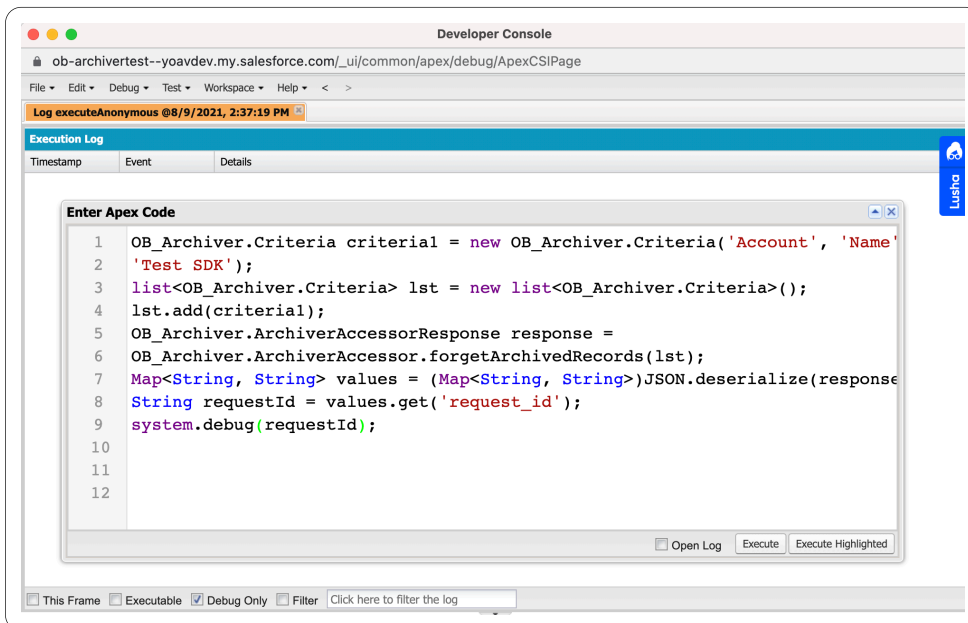
2. Press command E. The window to enter apex code opens.



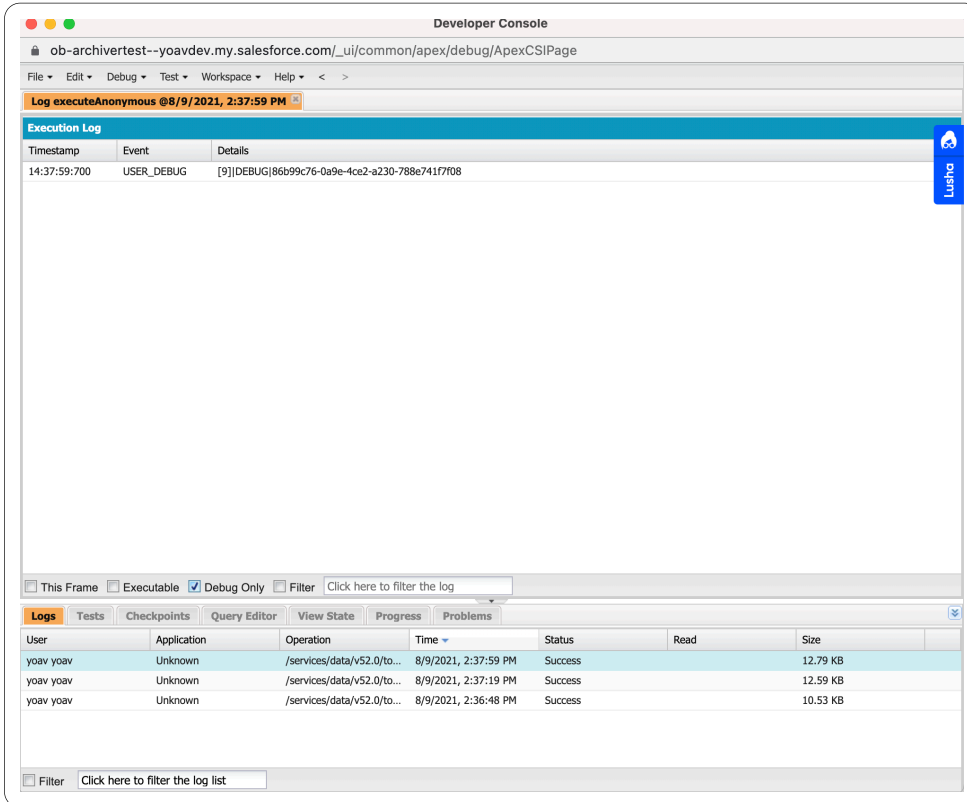
3. In the console, execute your code to create a criteria list, send a RTBF request, and get the request Id from Archive.

Example:

```
OB_Archiver.Criteria criterial = new OB_Archiver.Criteria('Account',
'Name', 'example name');
list<OB_Archiver.Criteria> lst = new list<OB_Archiver.Criteria>();
lst.add(criterial);
OB_Archiver.ArchiverAccessorResponse response =
OB_Archiver.ArchiverAccessor.forgetArchivedRecords(lst);
Map<String, String> values = (Map<String,
String>)JSON.deserialize(response.getBody(), Map<String, String>.class);
String requestId = values.get('request_id');
system.debug(requestId);
```



4. Click **Execute**. The request begins, and when completed the request Id is stored in the Execution Log as follows:



The screenshot shows the Salesforce Developer Console interface. The top bar indicates the user is logged in as 'yoavdev.my.salesforce.com'. The main area displays the 'Execution Log' for a recent anonymous execute request. The log shows a single entry with a timestamp of 14:37:59:700, event type 'USER_DEBUG', and details '[9][DEBUG]86b99c76-0a9e-4ce2-a230-788e741f7f08'. Below the log, there are tabs for 'Logs', 'Tests', 'Checkpoints', 'Query Editor', 'View State', 'Progress', and 'Problems'. The 'Logs' tab is active, showing a table of log entries.

User	Application	Operation	Time	Status	Read	Size
yoav yoav	Unknown	/services/data/v52.0/to...	8/9/2021, 2:37:59 PM	Success		12.79 KB
yoav yoav	Unknown	/services/data/v52.0/to...	8/9/2021, 2:37:19 PM	Success		12.59 KB
yoav yoav	Unknown	/services/data/v52.0/to...	8/9/2021, 2:36:48 PM	Success		10.53 KB

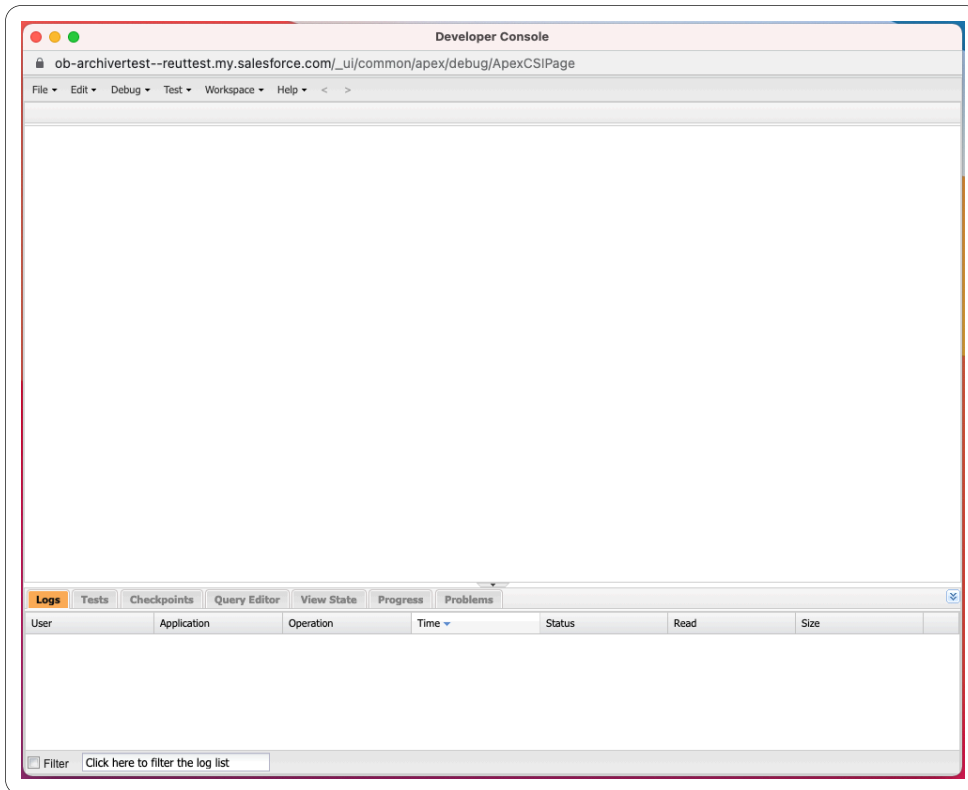


NOTE

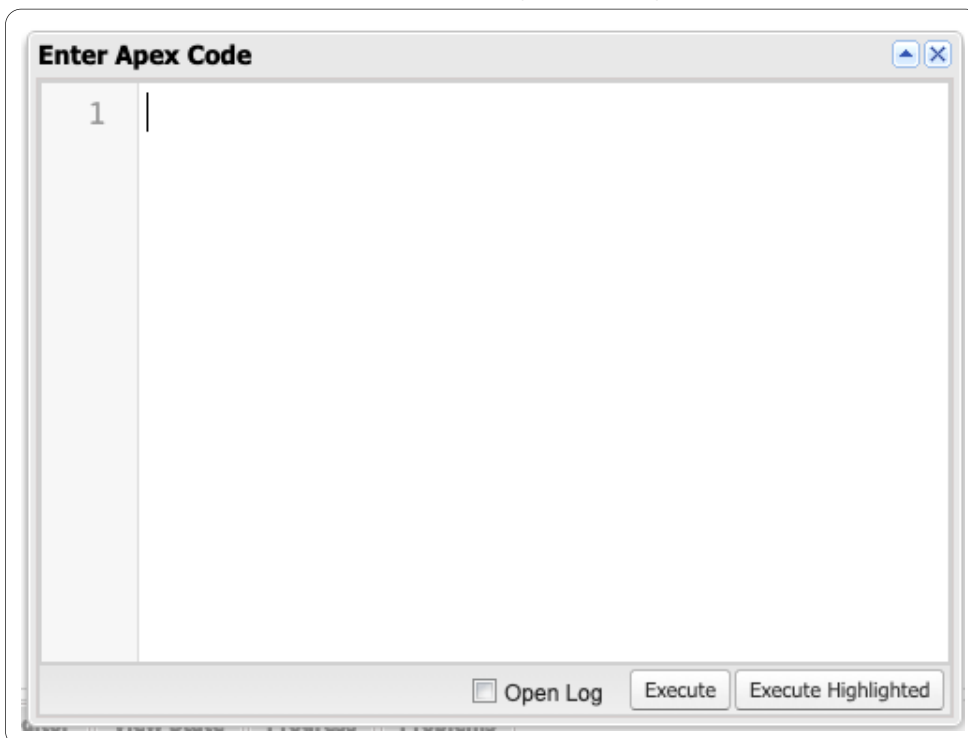
Make a note of the request Id for future use to view the status of the RTBF request.

Viewing the Status of the RTBF Request

1. At the top-right of the page, click the Settings icon ⚙️ to open the drop-down menu, and select Developer Console.
2. The Developer Console is displayed:



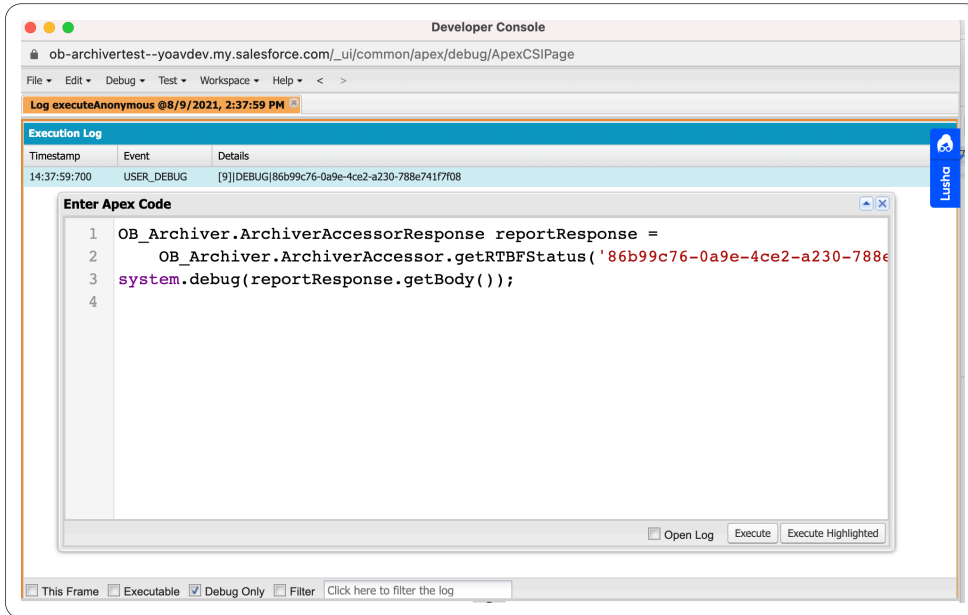
3. Press command E. The window to enter Apex code opens.



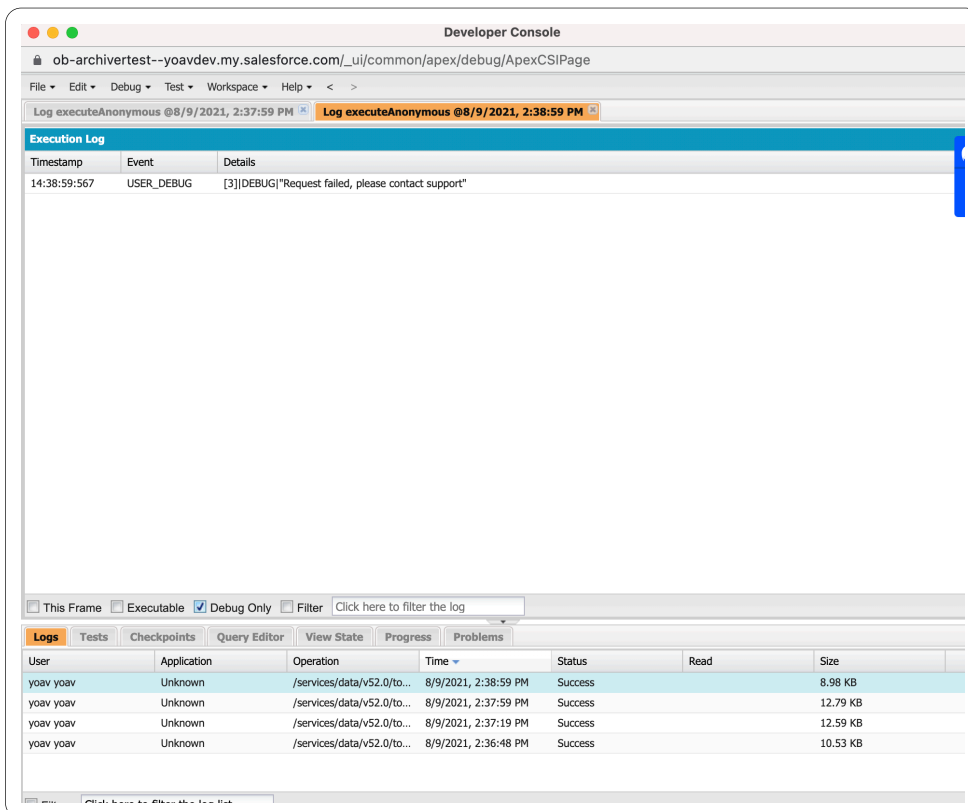
4. Using the request Id for your RTBF request, run the following code:

```
OB_Archiver.ArchiverAccessorResponse reportResponse =  
OB_Archiver.ArchiverAccessor.getRTBFStatus(requestId);
```

```
system.debug(reportResponse.getBody());
```



5. Click **Execute**. The status request begins, and when completed the status is displayed in the Execution Log as follows:



One of the following request status's is displayed:

- "Request is open. Scan is still in progress": The request is still in progress.
- "Request handled, no matching results were found": There were no records matching the specified criteria.
- "Request failed, please contact support": The request was unsuccessful and failed.

Once the request is finished successfully, you will receive a CSV report containing all the details of the information that will be deleted.

Original Salesforce Id	Criteria Record Type	Criteria Record Field	Status	Related Salesforce Id That Provoked Deletion
017S00000BwFrNIIQ0			pending	500S000000EyQWRIA3
0D5S000000Yij7WKAR			pending	500S000000EyQWRIA3
017S00000BwFrNHIQ0			pending	500S000000EyQWQIA3
0D5S000000Yij7VKAR			pending	500S000000EyQWQIA3
017S00000BwFrNKIQ0			pending	500S000000EyQWTIA3
0D5S000000Yij7YKAR			pending	500S000000EyQWTIA3
017S00000BwFrNJIQ0			pending	500S000000EyQWSIA3
0D5S000000Yij7XKAR			pending	500S000000EyQWSIA3
500S000000EyQWRIA3	Case	Subject	pending	
500S000000EyQWQIA3	Case	Subject	pending	
500S000000EyQWTIA3	Case	Subject	pending	
500S000000EyQWSIA3	Case	Subject	pending	

The CSV report contains the following information:

- Salesforce Id
- Criteria Record Type: The criteria of the request.
- Criteria Record Field
- Status: Indicates if the record was deleted or not
- Related Salesforce Id That Provoked Deletion: The row was referred to by another record in the table that also matches the criteria.

Common Errors

Invalid criteria

- The field must match an sObject.
- More than one criteria with the same sObject is not allowed.
- Per request you can send up to ten criteria.

No results

- Value cannot be partial.
- Criteria must be of record type that we archived.

For example, if we have an Account with Id X in Salesforce, and we archived the cases belonging to that Id, we want to “forget” cases belong to that account, and we will need to create the following criteria:

Record type: Case, field: AccountId, value: X



NOTE

The common mistake is creating the following criteria:

Record type: Account, field: Id, value: X

This will delete nothing because Archive does not have the relevant Account.


Legal Hold Requests

Archive can place archived records on a legal hold by creating a legal hold request. You can legally hold records more than once. For example, if a company is being sued by someone, you can place any archived records that mentions the name of the person on hold.

Any records legally held cannot be unarchived, removed from the system, or removed if they are accessed via the RTBF SDK or through the user interface.

1. Navigate to the Global Search tab.

The screenshot shows the 'Archive Global Search' interface. At the top, there's a search bar with the placeholder text 'Search for a Salesforce id, specific object or enter free t...'. To the right of the search bar are three dropdown menus: 'Object' (set to 'All'), 'Field' (set to 'Select Field'), and 'Term' (with a search icon and placeholder 'Search by id or by free text'). Further right is a button labeled 'Add Date Range'. Below these elements is a large blue icon of a folder labeled 'Own{backup}' with a cloud. Underneath the icon, the text 'Search Archived Data' is displayed, followed by the instruction 'Search for Salesforce ID, specific object or type free text.'

2. Search the Archive base for any ID, text string: word, term, name, etc for the individual whose records you wish to put on hold, or select the desired object from the drop-down list.
3. Click the search icon . The results are displayed.

The screenshot shows the 'Archive Global Search' results page. At the top, there's a search bar with the placeholder text 'Search for a Salesforce id, specific object or enter free t...'. To the right of the search bar are three dropdown menus: 'Object' (set to 'Lead'), 'Field' (set to 'All'), and 'Term' (with a search icon and placeholder 'Search by id or by free text'). Further right is a button labeled 'Remove Date Range'. Below these elements are two date pickers: 'Date' (set to 'Created Date') and 'From Date:' (set to 'May 25, 2022') and 'To Date:' (set to 'Jun 1, 2022'). To the right of the date pickers is a search icon. Below the search bar and date pickers, the text 'Page 1 out of 1 - about 14 results' is displayed. Below this is a table with 14 results. The table has columns: 'Full Name', 'Title', 'Company', 'Phone', 'Email', 'Status', and 'Owner ID'. The table is titled 'Leads (14)'. The first row shows 'own' as the full name, 'ownbackup' as the company, and 'Shai Rubin' as the owner ID. The second row shows 'Dotty Gillespie' as the full name, '000str_Tax.' as the company, and 'Adi Vaknin' as the owner ID. The third row shows 'own' as the full name, 'ownbackup' as the company, and 'Shai Rubin' as the owner ID. The fourth row shows 'Kameko Buckley' as the full name, '344str_Five.' as the title, '312str_Seek.' as the company, '892-055-6098' as the phone, 'helene.marks902@no...' as the email, 'Qualified' as the status, and 'Adi Vaknin' as the owner ID. The fifth row shows 'Jodee Payne Michaeline ...' as the full name, '875str_Rest.' as the title, '812str_List.' as the company, '950-132-5240' as the phone, 'hermione.crane751@...' as the email, 'Unqualified' as the status, and 'Adi Vaknin' as the owner ID. The sixth row shows 'Elsy Dickens Nissa Hayes' as the full name, '062str_Media.' as the title, '969str_Half.' as the company, '676-356-4342' as the phone, 'ilise.puckett681@bloc...' as the email, 'Qualified' as the status, and 'Adi Vaknin' as the owner ID. The seventh row shows 'Henrietta Grady' as the full name, '188str_Past.' as the title, '250str_Land.' as the company, '118-544-4897' as the phone, and 'Qualified' as the status. The eighth row shows 'own' as the full name, 'ownbackup' as the company, and 'Shai Rubin' as the owner ID. The table has a 'vascript:void(0)' button at the bottom left.

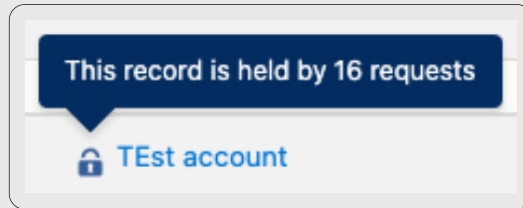
	Full Name	Title	Company	Phone	Email	Status	Owner ID
1	own		ownbackup			New	Shai Rubin
2	Dotty Gillespie		000str_Tax.	853-654-9931	ronalda.willard786@n...	Qualified	Adi Vaknin
3	own		ownbackup			New	Shai Rubin
4	Kameko Buckley	344str_Five.	312str_Seek.	892-055-6098	helene.marks902@no...	Qualified	Adi Vaknin
5	Jodee Payne Michaeline ...	875str_Rest.	812str_List.	950-132-5240	hermione.crane751@...	Unqualified	Adi Vaknin
6	Elsy Dickens Nissa Hayes	062str_Media.	969str_Half.	676-356-4342	ilise.puckett681@bloc...	Qualified	Adi Vaknin
7	Henrietta Grady	188str_Past.	250str_Land.	118-544-4897		Qualified	Adi Vaknin
8	own		ownbackup			New	Shai Rubin


You can click the down arrow to view, export or unarchive the record.

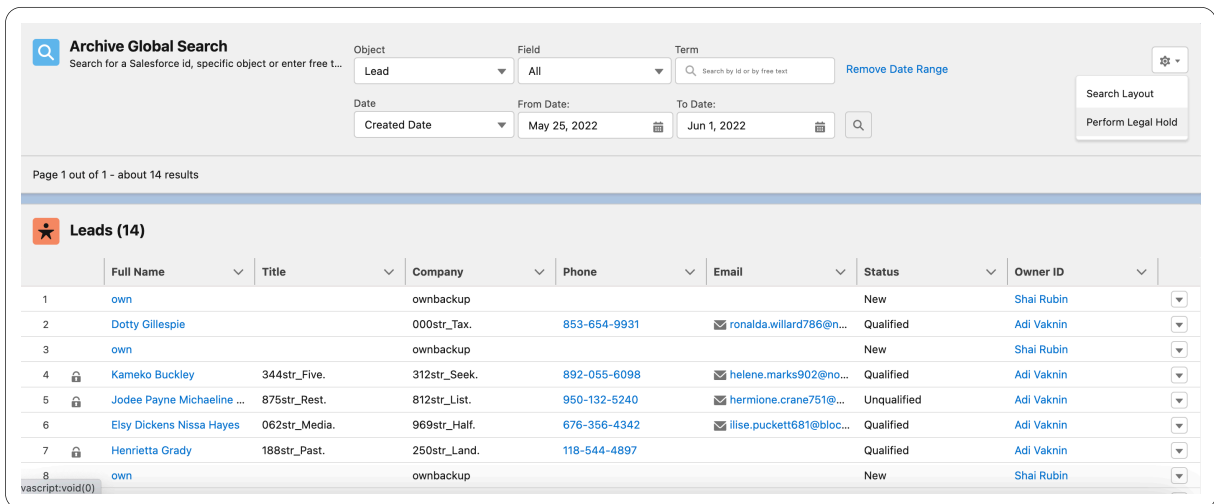


NOTE

Any records already legally held, will contain a lock icon. Hovering the lock will indicate the number of requests holding the record.



4. At the top-right of Global Search, click the Settings icon  to open the drop-down menu, and select Perform Legal Hold.



Archive Global Search
Search for a Salesforce id, specific object or enter free t...

Object: Lead, Field: All, Term: Search by id or by free text, Remove Date Range

Date: Created Date, From Date: May 25, 2022, To Date: Jun 1, 2022

Page 1 out of 1 - about 14 results

Leads (14)

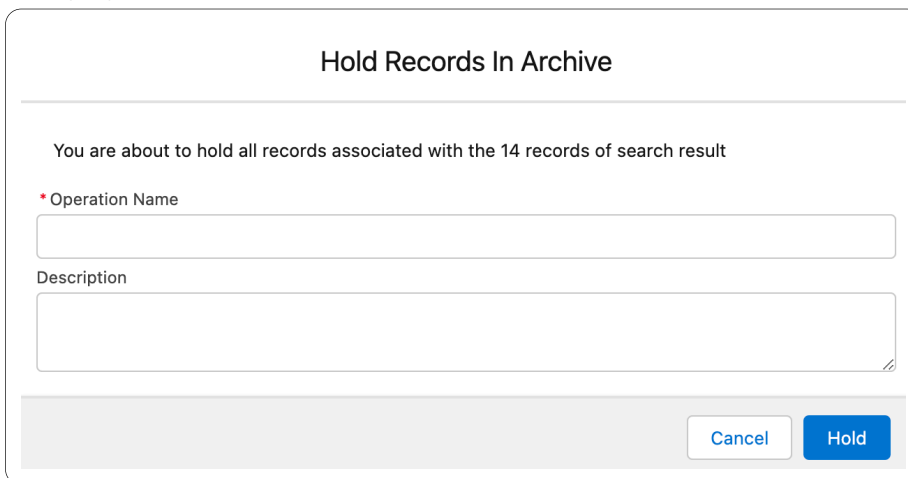
	Full Name	Title	Company	Phone	Email	Status	Owner ID
1	own		ownbackup			New	Shai Rubin
2	Dotty Gillespie		000str_Tax.	853-654-9931	ronalda.willard786@n...	Qualified	Adi Vaknin
3	own		ownbackup			New	Shai Rubin
4	Kameko Buckley	344str_Five.	312str_Seek.	892-055-6098	helene.marks902@no...	Qualified	Adi Vaknin
5	Jodee Payne Michaeline ...	875str_Rest.	812str_List.	950-132-5240	hermione.crane751@...	Unqualified	Adi Vaknin
6	Elsy Dickens Nissa Hayes	062str_Media.	969str_Half.	676-356-4342	ilise.puckett681@bloc...	Qualified	Adi Vaknin
7	Henrietta Grady	188str_Past.	250str_Land.	118-544-4897		Qualified	Adi Vaknin
8	own		ownbackup			New	Shai Rubin



NOTE

If the option to select Perform Legal Hold is not available, please contact your System Administrator to grant you the necessary permissions.

The **Hold Records in Archive** window opens, and the number of root records that will be held is displayed.



Hold Records In Archive

You are about to hold all records associated with the 14 records of search result

* Operation Name

Description

Cancel Hold



NOTE

The total number of held records can be higher as OwnBackup also archives child records.

5. In the Hold Records In Archive window:
- Enter an Operation Name.
 - Enter a description for the record.
 - Click **Hold**.
- A success message appears:

✓

Success

Request for legal hold has been successfully submitted. Please note that it may take up to 30 minutes to complete the request pending on current system load.

✕

Legal Hold Report

The Legal Hold Report allows you to view a list of the legal hold requests performed.

You can find the report using the following options:

- On the Archive Home Page, Click **Legal Holds Requests**.

🔍

Archive Dashboard

Version 14.27 | [what's new ...](#)

Legal Hold Requests

The Legal Hold Report is displayed.

Legal Hold Report

Legal Hold Report | 135 items

	Legal Hold Date	Name	Email	Number Of Records	Description	Status
1	Jun 2, 2022	test	lironh@ownbackup.com	179,044		Active
2	Jun 2, 2022	New Test	ronic@ownbackup.com	51		Inactive
3	Jun 2, 2022	legal_hold_request_595dc41e-...	test@sf.com	3		Inactive
4	Jun 2, 2022	legal_hold_request_57105f1d-e...	test@sf.com	3		Inactive
5	Jun 1, 2022	Test	ronic@ownbackup.com	35	Understanding how legal hold ...	Inactive
6	May 31, 2022	legal_hold_request_59458927...	test@sf.com	52		Inactive
7	May 30, 2022	legal_hold_request_a53ea364-...	test@sf.com	48		Inactive
8	May 30, 2022	legal_hold_request_46eeaa5f-...	test@sf.com	52		Inactive
9	May 28, 2022	legal_hold_request_5b272a7b-...	test@sf.com	48		Inactive
10	May 28, 2022	legal_hold_request_c6aac818-...	test@sf.com	52		Inactive

- The table contains the following information:
- Legal Hold Date
 - Name
 - Email
 - Number of Records
 - Description
 - Status

Legal Hold Dropdown

You can click the down arrow to view, export or unarchive the record.

Cases (4)

	Case Number	Subject	Description	Status	Created Date	Owner ID	Account ID
1	01115110	969str_Four.	094str_Run.	New	5/28/2022 9:23 AM	Adi Vaknin	
2	01115115	438str_Blood.	344str_Pick.	New	5/28/2022 9:24 AM	Adi Vaknin	
3	01115117	562str_Goal.	312str_Dark.	New	5/28/2022 9:24 AM	Adi Vaknin	
4	01115156	094str_Worry.	250str_Stand.	Escalated	5/28/2022 9:27 AM	Adi Vaknin	

View

Unarchive

Export

- **View:** You can view additional information about the record. If the record is an archived record, and it is legally held, an additional "Related Legal Hold Requests" tab is displayed showing the list of jobs that are holding the record.
- **Export:** Exports the specific record.

Legal Hold Report® Legal Hold Report 135 items							
	Legal Hold Date ↓	Name	Email	Number Of Records	Description	Status	
1	Jun 2, 2022	test	lironh@ownbackup.com	179,044		Active	
2	Jun 2, 2022	New Test	ronic@ownbackup.com	51		Active	Export Unhold
3	Jun 2, 2022	legal_hold_request_595dc41e-...	test@sf.com	3		Inactive	
4	Jun 2, 2022	legal_hold_request_57105f1d-e...	test@sf.com	3		Inactive	
5	Jun 1, 2022	Test	ronic@ownbackup.com	35	Understanding how legal hold ...	Inactive	

- **Unarchive:** If any of the records are legally held, this option is unavailable.

Unhold a Request



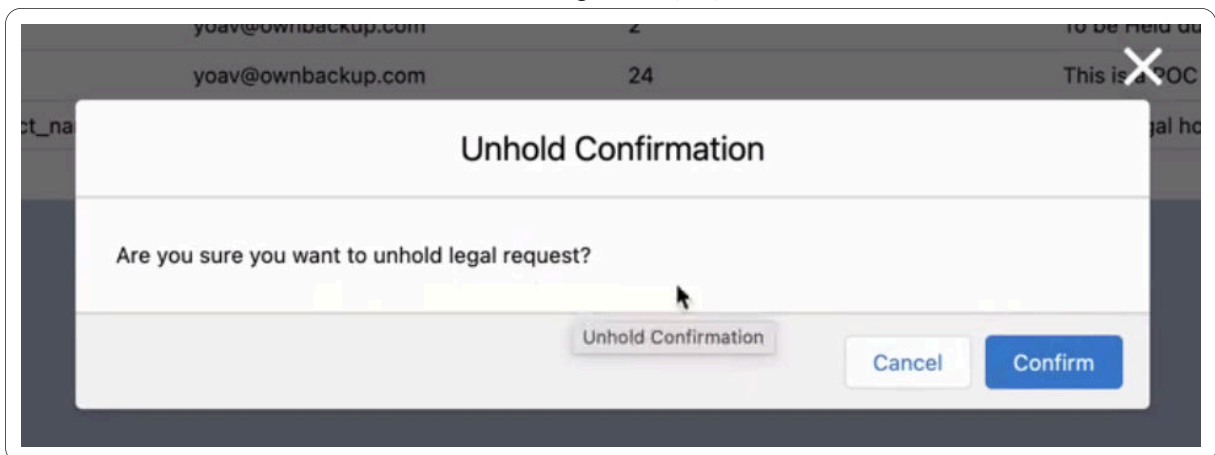
NOTE

If the option to Unhold a legally held record is not available, please contact your System Administrator to grant you the necessary permissions.

1. On the Archive Home Page click **Legal Hold Requests**. The Legal Hold Report is displayed.
2. Click the down arrow next to the record you wish to unhold. The Export and Unhold options are displayed.

Legal Hold Report® Legal Hold Report 135 items							
	Legal Hold Date ↓	Name	Email	Number Of Records	Description	Status	
1	Jun 2, 2022	test	lironh@ownbackup.com	179,044		Active	
2	Jun 2, 2022	New Test	ronic@ownbackup.com	51		Inactive	Export Unhold
3	Jun 2, 2022	legal_hold_request_595dc41e-...	test@sf.com	3		Inactive	
4	Jun 2, 2022	legal_hold_request_57105f1d-e...	test@sf.com	3		Inactive	
5	Jun 1, 2022	Test	ronic@ownbackup.com	35	Understanding how legal hold ...	Inactive	
6	May 31, 2022	legal_hold_request_59458927...	test@sf.com	52		Inactive	

3. Click **Unhold**. The Unhold Confirmation message is displayed.



4. Click **Confirm**.
A success message appears:



NOTE

To put the record back on hold, see [Legal Hold Requests \[73\]](#).

Export All Records

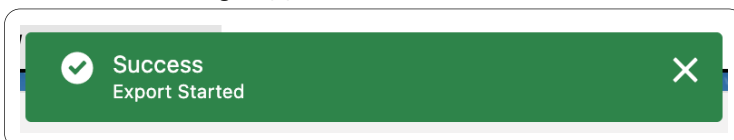
Using export, you can export all the records held by a specific job. It is also a way to provide mass export.

1. On the Archive Home Page click **Legal Hold Requests**. The Legal Hold Report is displayed.
2. Click the down arrow next to the record you wish to export. The Export and Unhold options are displayed.

	Legal Hold Date ↓	Name	Email	Number Of Records	Description	Status
1	Jun 2, 2022	test	lironh@ownbackup.com	179,044		Active
2	Jun 2, 2022	New Test	ronic@ownbackup.com	51		Active
3	Jun 2, 2022	legal_hold_request_595dc41e-...	test@sf.com	3		Inactive
4	Jun 2, 2022	legal_hold_request_57105f1d-e...	test@sf.com	3		Inactive
5	Jun 1, 2022	Test	ronic@ownbackup.com	35	Understanding how legal hold ...	Inactive

3. Click **Export**.

A success message appears:



Once completed, a CSV file is created containing the exported records. The file is available in the Activities tab.

Reporting

The feature provides the ability to export archived records to S3 and Azure so that you can use BI tools to analyze the archived data. Customers who use reporting tools (such as Einstein Analytics, Tableau, Looker etc) can include the archived data in their reports.

For example, a report that shows the number of cases during the last Queue, while some of the cases were archived.

Field Level Security Reports

Field-Level Security (FLS) settings in Salesforce are used to prevent access to specific fields on a profile by profile basis. Archive FLS Report list the fields that the Archive Integration User does not have permissions for, thus allowing you to review the report and take the appropriate action.

User Permissions

The Archive Integration User, is the authenticated user.

This is the user that OwnBackup uses to access your Salesforce environment. This user has nothing to do with the users using the archive tool and must have full permissions to all Fields.

Example

Archiving a Case object.


The Case object has a field 'Case Parent Id'. If the Authenticated User does not have permission to view (read) 'Case Parent Id', when the case is archived, it will be done without this field. This happens because Archive cannot know that this field exists for that object.

Archive FLS Report

The Archive FLS Report lists the fields for which the Archive Authenticated User is missing permissions.

Archive actions are done via an Integration User. If users do not have the correct permissions, some records will not be archived. We identified that there are records that were NOT archived due to the FLS issues. Below is a list of all fields with missing permissions for the Integration User.

1. On the Archive Home Page, in the Archive Reporting section, click Archive FLS report. The FLS Report opens.

FLS Report 					Run Now
Archiver report 9 items, last ran at: 05/12/2021 02:03:43					
Field Name	Object Name	Identified On	Acknowledge Date	Acknowledge By	
1 IsPrivateDraft	EmailMessage	Nov 27, 2021			▼
2 MessageSize	EmailMessage	Nov 27, 2021			▼
3 Email	Task	Nov 27, 2021			▼
4 Phone	Task	Nov 27, 2021			▼
5 Type	Task	Nov 27, 2021			▼
6 AssetId	Case	Nov 23, 2021			▼
7 BusinessHoursId	Case	Nov 23, 2021			▼
8 IsClosedOnCreate	Case	Nov 23, 2021			▼
9 SourceId	Case	Nov 23, 2021			▼



NOTE

A customs field column has been added to the FLS Report.

2. Please review and take the appropriate action:
 - a. In Salesforce adjust the permission for the field.
 - b. Click "acknowledge", if the field is not used in your Org, or if you cannot set the permission due to Salesforce limitations.
 - c. Use the Archive recommendations to handle your fields.

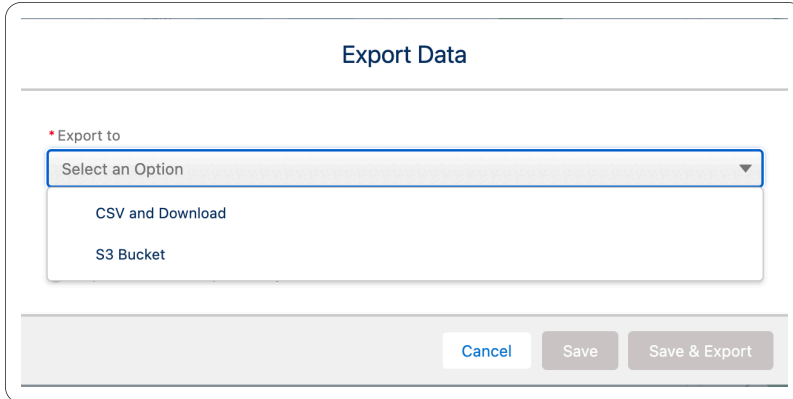


NOTE

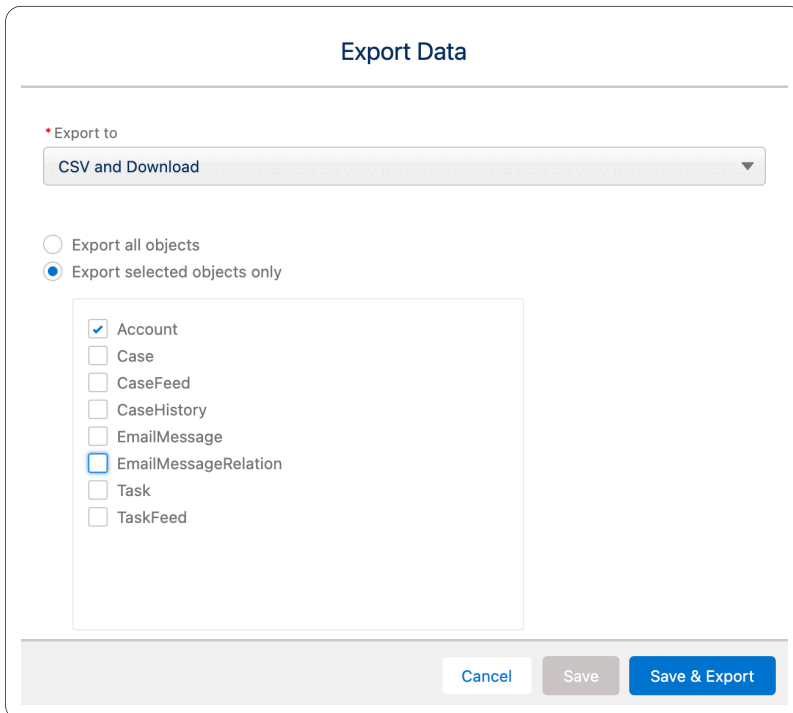
The FLS report runs once a week checking for the missing permission for all the objects that were archived. Newly onboarded customers note that several days may pass before the first report is generated. Alternatively, you can click **Run Now** to run a report.

CSV to Download and Export to S3

1. On the Archive Home Page, in the Archive Reporting section, click **Export Archived Data**. The Export Data window opens.



2. From the Export to drop-down, select CSV and Download.
3. Select whether to export all objects or export only the selected object.



4. When exporting only the selected objects, select the objects you wish to export.
5. Click **Save & Export**.



NOTE

CSV and download does not include attachments. The CSV includes a description field and a link that directs you to an article explaining how to resolve the issue.



WARNING

OwnBackup is not responsible for the security, privacy or protection of data in external storage.

Please make sure you secure the external environment appropriately to prevent unwanted access.

Amazon Web Services

Before you can upload data to Amazon S3, you must create a bucket in one of the AWS Regions to store your data. You can find further information [here](#).

1. Create an S3 bucket.
2. Generate IAM Access Key.

To export data from the Archive to the AWS S3 Bucket you need an access key with write access. If you create the IAM Access Key as an admin user, the key has Read/Write access.



WARNING

OwnBackup are not responsible for data exported from OwnBackup to external storage. OwnBackup cannot be held responsible for the security, privacy or protection of data in any external storage.


You are responsible for your S3 Bucket security and privacy. We are unable to check that the bucket is secure (bucket policies, permissions, etc).

Export to S3 Bucket

Once you have your AWS Access Key, you can navigate to the OwnBackup Archive app in your Salesforce environment and export the data to the S3 bucket.

1. Click **Exporting Archived Data**. The Export Data window opens.
2. From the Export to drop-down, select S3 Bucket.

Export Data

 You are about to export data from OwnBackup to external storage that OwnBackup doesn't own or control. OwnBackup is not responsible for the security, privacy or protection of data in this external storage. Please make sure that you secure this external environment appropriately to prevent any unwanted access.

* Export to

S3 Bucket


* AWS Secret Access Key Id

* AWS Secret Access Key

* S3 Path

(e.g. 'my-bucket-name' or 'my-bucket-name/my-folder-name')

* AWS S3 Region

☐ Automatically export new data 

☒ Export all objects

☐ Export selected objects only

Cancel

Save

Save & Export

3. Enter the details of the S3 bucket:
 - **Export to S3 Bucket**
 - **AWS Secret Access Key:** - From the IAM user. For example, FAKEKEYAKIA2EYKPPXN
 - **AWS Secret Access Key Id:** From the IAM user secret access key.
 - **S3 Path:** Enter the bucket name selected during the S3 Bucket setup. You can also create a folder in your S3 bucket and add it to your path. For example, s3-bucket-name/folder/.
 - **AWS S3 Region:** Enter the region where the bucket resides. For example, us-east-1



NOTE

To export new data on a daily basis select **Automatically export new data**.



NOTE

Only objects that have archived records will be listed for export. When an object is first archived it takes approximately one hour until it is available for export.

4. Select whether to export all object, or export only the selected objects.

5. When exporting only selected objects, select the objects you wish to export.

☐ Export all objects
☒ Export only the selected objects

- ☐ Account
- ☐ Case
- ☐ CaseFeed
- ☐ CaseHistory
- ☐ Contact
- ☐ ContentDocument
- ☐ ContentDocumentHistory
- ☐ ContentDocumentLink
- ☐ ContentVersion
- ☐ ContentVersionHistory
- ☐ EmailMessage

Cancel Save Save & Export

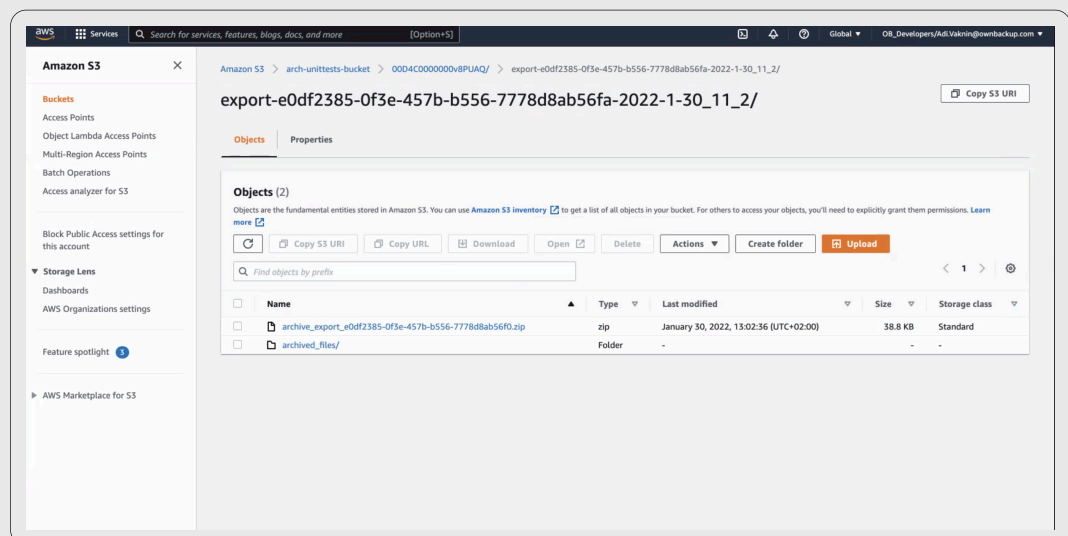
6. Click **Save & Export**.

To check that your export worked, navigate to the S3 bucket, where you should see a new folder.



NOTE

When you select S3 a request ID is automatically generated and can only be seen at the top of your S3 bucket page. This request ID will provide you with a special number followed by the date and time that you generated this request. Export to S3 includes all attachments.



NOTE

Archive export to S3 exports the metadata of the file, and a CSV report as an attachment. S3 exports cannot be incremental.

**WARNING**

OwnBackup is not responsible for the security, privacy or protection of data in external storage. Please make sure you secure the external environment appropriately to prevent unwanted access.

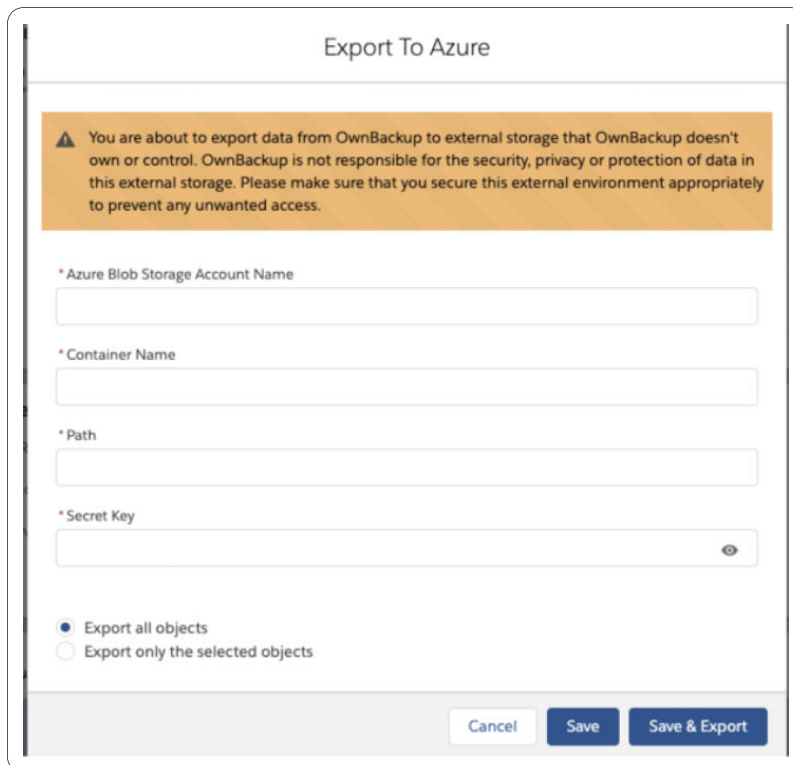
Export to Azure

Customers who use reporting tools can include the archived data in their reports. Azure Blob storage is Microsoft's object storage solution for the cloud. Blob storage is optimized for storing massive amounts of unstructured data. Unstructured data is data that doesn't adhere to a particular data model or definition, such as text or binary data. Blob storage supports Azure Data Lake Storage Gen2, Microsoft's enterprise big data analytics solution for the cloud.

Export Archive Data to Azure Blob Container

Once you have set up your Azure Blob Container, you can navigate to the OwnBackup Archive app in your Salesforce environment and export the data.

1. On the Archive Home Page, in the Archive Reporting section, click **Export Archived Data**. The Export Data window opens.
2. From the Export to drop-down, select Azure Blob Storage . The Export to Azure window opens.



3. Enter the following details:
 - a. **Azure Blob Storage Account Name.**
 - b. **Container Name.**
 - c. **Path:** For example, mycontainer/myblob
 - d. **Secret Key:** For example,
cMnGBfdln5fgkKsZLkmfzBSTq3RyWRXXGFvFUGjsk2ZwfNei4Fh3XoIIGMfZ75itJ+LXMT
e9nnl8do+BZ/KJaA==
4. Select whether to export all object, or export only the selected objects.
5. When exporting only selected objects, select the objects you wish to export.

☐ Export all objects
☒ Export only the selected objects

- ☐ Account
- ☐ Case
- ☐ CaseFeed
- ☐ CaseHistory
- ☐ Contact
- ☐ ContentDocument
- ☐ ContentDocumentHistory
- ☐ ContentDocumentLink
- ☐ ContentVersion
- ☐ ContentVersionHistory
- ☐ EmailMessage

Cancel Save Save & Export

6. Click **Save & Export**.



NOTE

Archive export to Azure does not include attachments. Azure exports cannot be incremental.








WARNING


OwnBackup is not responsible for the security, privacy or protection of data in external storage. Please make sure you secure the external environment appropriately to prevent unwanted access.

Archive Application Permission Sets

The following permissions are required for OwnBackup Archive.

Permission Set	Description
Archive Enable Export	Provides the capability to export records the OwnBackup Archive application.
Archive Enable Unarchive	Unarchive AND export records of the OwnBackup Archive application.
Archive Global Search	Access to the Global Search feature in the OwnBackup Archive application.
	 NOTE The Global Search feature provides read access to the entire archive. Typically, only Admins should have this permission.
Archive Admin	Provides the capability to manage archiving policies in the OwnBackup Archive application.
	 NOTE Be aware managing archive policies entails the ability to delete records. Typically only Admins have this permission.
Archive Policy Definition	Manage archiving policies in the OwnBackup Archive application.
	 NOTE Managing archive policies requires the ability to delete records. Typically, only Admins should have this permission.
Archive View Archived Records	Enable viewing archived records in the Lightning page.
Archive Legal Hold Admin	Provides access to perform legal hold, unhold, search and export of legal hold data.
Archive Legal Hold Table	Provides permission only to legal hold table (legal hold report).
Archive FLS	Provides access to FLS report tab to run FLS report.
	 NOTE When granting this permission you should also add the Archive Home Page permission.
Archive Settings	Provides access to Archive Settings.
	 NOTE When granting this permission you should also add the Archive Home Page permission.
Archive Activities	Provides access to Activities table.
Archive Home Page	Provides access to Home Page.

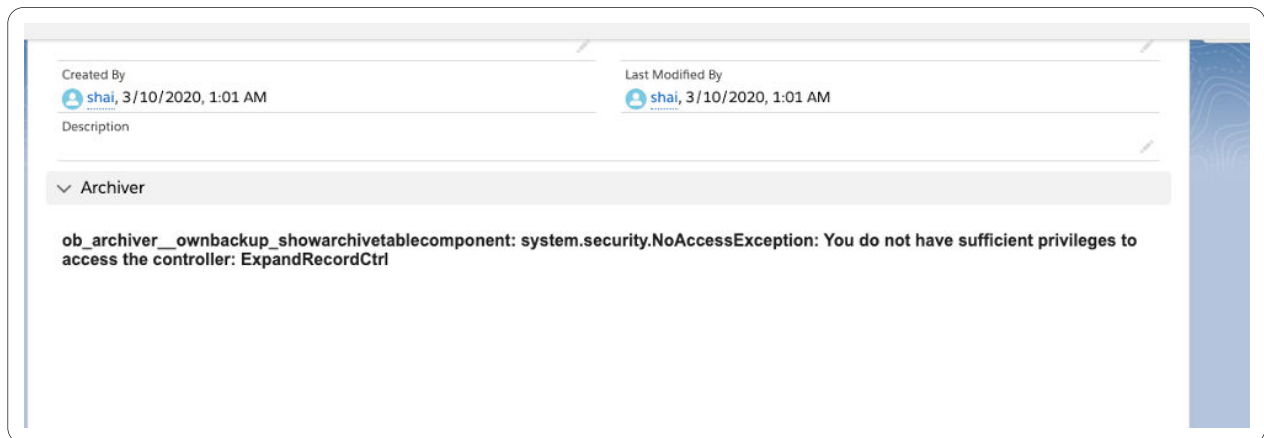
Permission Set	Description
Archive Purge Policy Permission	Provides permissions for Archive Purge Policy.



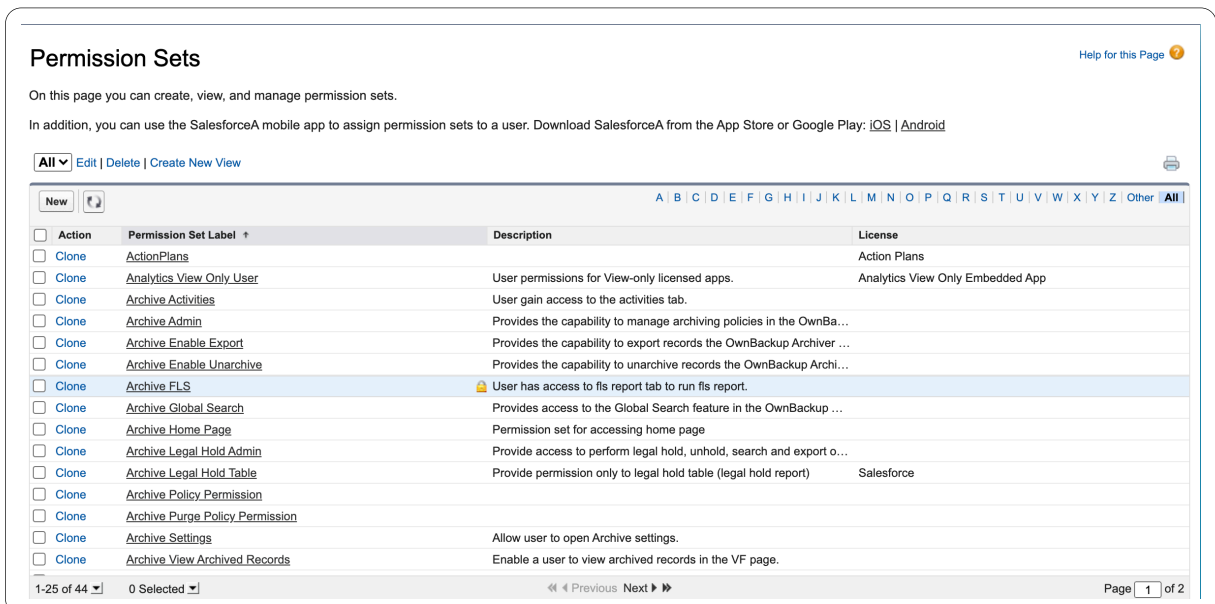
NOTE
Provides Permission to Purge. You will need to assign the Archive Purge Policy Permissions in the Salesforce permission sets. Alternatively, you can assign Archive Admin to get full access to both Archive and Purge policies.

Default Permission Sets: Archive View Archived Records

When a standard user attempt to access the widget, they would typically see the below window. The problem is that by default standard users do not have access to archive data.



1. At the top-right of the page, navigate to Setup.
2. Filter by typing in "Permission Sets" in the Quick Find.



3. Select the 'Archive View Archive Records' Permission Set.

Quick Find / Search...

Expand All | Collapse All

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Salesforce Mobile Quick Start

Home

Administrator

- Release Updates
- Manage Users**
 - Users
 - Mass Email Users
 - Roles
- Permission Sets
 - Permission Set Groups
 - User Management Settings
 - Profiles
 - Public Groups
 - Queues
 - Login History

Permission Set

Archive View Archived Records

Find Settings... [Clone](#) [Manage Assignments](#)

Permission Set Overview

Field	Value
Description	Enable a user to view archived records in the VF page.
License	
Session Activation Required	<input type="checkbox"/>
Last Modified By	Roni Cohen, 4/4/2022, 12:25 AM
API Name	Archiver_View_Archived_Records
Namespace Prefix	OB_Archiver
Created By	Adi Vaknin, 9/19/2021, 10:44 AM

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Flow Access
Permissions to execute Flows

Named Credential Access
Permissions to authenticate against named credential

4. Click **Manage Assignments**.

Own{backup} Search...

Switch to Lightning Experience Charlotte Hertz Setup Help & Training **OB Archiver**

Home Archiver Home Page Policies Activities Global Search +

Quick Find / Search...

Expand All | Collapse All

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Salesforce Mobile Quick Start

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- Permission Sets

Assigned Users

Archive View Archived Records

Back to: Permission Set

[Add Assignments](#) [Remove Assignments](#)

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager	Expires On
<input type="checkbox"/> Edit Login	Amit Reul	rr	reul@ownbackup.com.obarchiverst.reulst2	7/14/2021 4:06 AM	adl	<input checked="" type="checkbox"/>	System Administrator		

[Add Assignments](#) [Remove Assignments](#)

5. Click **Add Assignments**.

Quick Find / Search...

Expand All | Collapse All

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Salesforce Mobile Quick Start

Assigned Users

Archive View Archived Records

Back to: Permission Set

[Add Assignments](#) [Remove Assignments](#)

Full Name	Alias	Username	Role	Active	Profile	Expires On
No records to display.						

[Add Assignments](#) [Remove Assignments](#)

6. Assign the relevant users to this permission set by selecting the checkbox next to their name.

7. Click **Assign**.

A success message appears:

Quick Find / Search...

Expand All | Collapse All

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Get Started

Salesforce Mobile Quick Start

Home

Administer

Releasees | Initiates

Assign Users

All Users Help for this Page

View: All Users Edit | Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Assign Cancel

<input type="checkbox"/> Action	Full Name +	Alias	Username	Last Login	Role	Active	Profile
<input type="checkbox"/> Edit Login	Berkman, Ariel	ABerk	archiverdev1org@ownbackup.com.ronidev			✓	System Administrator
<input type="checkbox"/> Edit Login	Chatter Expert	Chatter	chatty.00d8k0000008fhsuaa.rhfa0zhegvy@chatter.salesforce.com			✓	Chatter Free User
<input type="checkbox"/> Edit	Cohen, Roni	rocohe	ronio@ownbackup.com.archiverdev1.ronidev	4/6/2022, 6:24 AM		✓	System Administrator
<input type="checkbox"/> Edit Login	sarel harush, Iiron	lsare	lironh@ownbackup.com.archiverdev1.ronidev			✓	System Administrator
<input type="checkbox"/> Edit Login	Vaknin, Adi	avakn	adi@ownbackup.com.archiverdev1.ronidev	4/6/2022, 6:19 AM		✓	System Administrator

Assign Cancel

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

8. Click **Done**.

Limitations

The following are not supported in Archive:

- Archiving of recurrent tasks
- Archiving of knowledge articles

Global Search

- Fields that have the word "date" are defined as a date field.
- If you select field, a term must be added.
- The Term field can only search 256 characters at a time.

The screenshot shows the 'Global Search' interface. At the top, a red error banner displays the message: 'Error [ErrorDetail(string='Invalid search term: Ensure this field has no more than 256 characters.', code='invalid')]' with a close button. Below the banner, the search form is visible. It includes a 'Term' field with the text 'ownbackupownbackupownbac' and a 'Remove Date range' link. The 'Date' section shows 'From Created Date: Aug 16, 2021' and 'To Created Date: Aug 26, 2021'. Below the form, there is a blue icon of a storage box labeled 'Own{backup}' and the text 'Search Archived Data' and 'Search for Salesforce ID, specific object or type free text.'

- Date range input in Global Search is treated as GMT Time Zone. This means that the results within the GMT time zone will appear.



NOTE

You may get results outside the date range according to the user's time zone may be displayed. Some results that are within the date range according to the user's time zone may not be displayed.

- There are up to 6 filters.
- There is a limit of 40 pages.

Incremental Export Objects

By selecting an S3 bucket export you can choose to select specific objects.

When selecting this option, the initial export is a full export of all selected objects subsequent exports contain incremental data only. Exporting all objects is recommended.

Export Data

⚠ You are about to export data from OwnBackup to external storage that OwnBackup doesn't own or control. OwnBackup is not responsible for the security, privacy or protection of data in this external storage. Please make sure that you secure this external environment appropriately to prevent any unwanted access.

* Export to

S3 Bucket

* AWS Secret Access Key Id

* AWS Secret Access Key

* S3 Path

(e.g. 'my-bucket-name' or 'my-bucket-name/my-folder-name')

* AWS S3 Region

☒ Automatically export new data ⓘ

☒ Export all objects

☐ Export selected objects only


Cancel

Save

Save & Export

If you select Export selected objects only and at any point once the incremental daily exports are running, add/change the objects selected, then the export becomes a new job. The next daily export will therefore contain the entire data of the objects selected and not the incremental data. Subsequent exports will contain incremental data, until a further change to the export configuration is made.

Export Data

 You are about to export data from OwnBackup to external storage that OwnBackup doesn't

Export Data

Export to

S3 Bucket

AWS Secret Access Key Id

AWS Secret Access Key

S3 Path

(e.g. 'my-bucket-name' or 'my-bucket-name/my-folder-name')

AWS S3 Region

☒ Automatically export new data

☐ Export all objects

☒ Export selected objects only

☐ Account

☐ Case

☐ CaseFeed

☐ CaseHistory

☐ Contact

☐ ContentDocument

☐ ContentDocumentHistory

☐ ContentDocumentLink

☐ ContentVersion

☐ ContentVersionHistory

☐ EmailMessage

Pre-defined Policy

All objects that can be deleted appear in the drop-down menu.

Mobile Widget

The Mobile Widget only shows the first three columns that you have defined in your widget.

Additional Resources

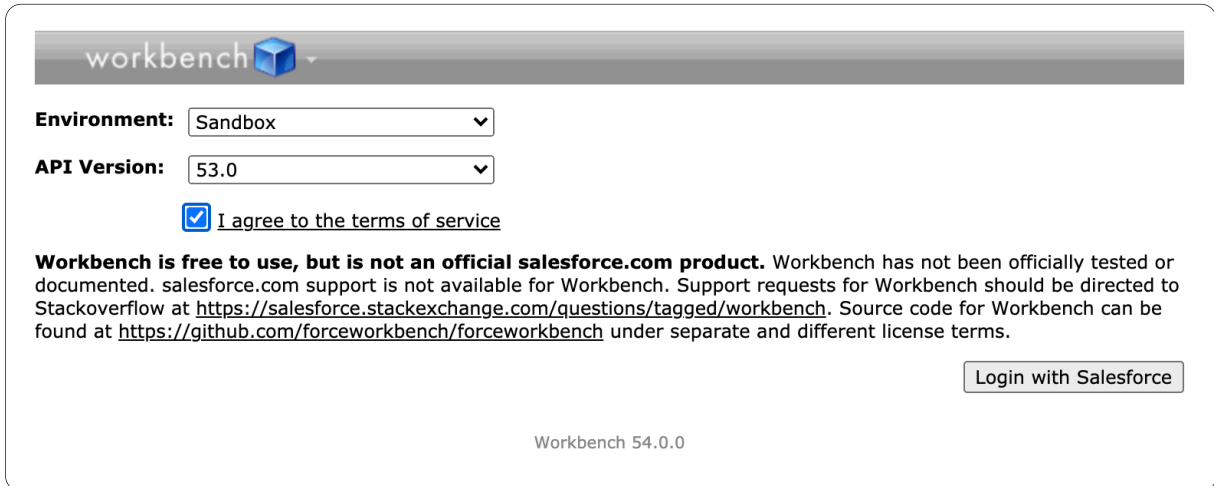
Users of OwnBackup are supported by the backup and restore experts of the OwnBackup Archive Customer Support department and an online knowledge base for self-serve information, <http://www.ownbackup.com/knowledge-base-2>.

Please do not hesitate to contact our Customer Support team from your OwnBackup account or via email at Support@ownbackup.com.

Appendix A. Uninstalling and Reinstalling Archive

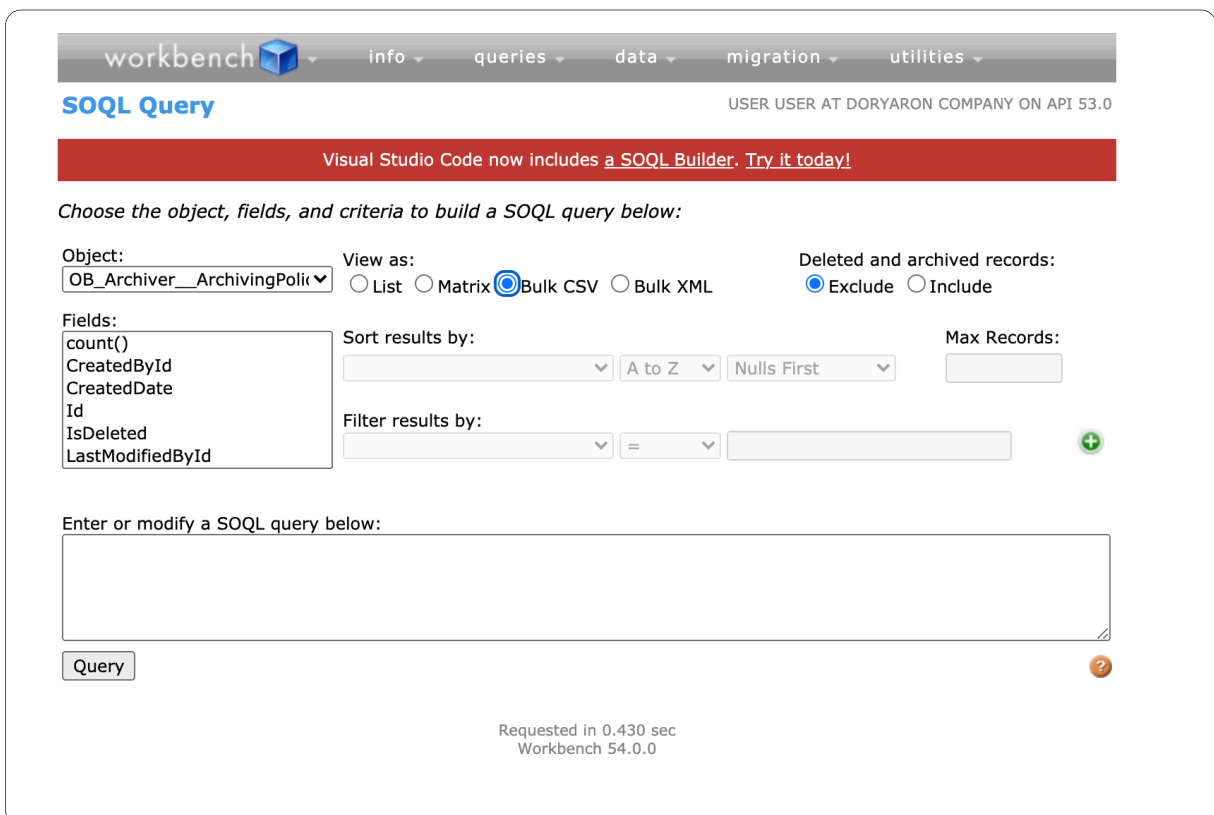
Reinstall Archive to upgrade to the latest version.

1. Navigate to your Workbench and select Sandbox from dropdown menu.
2. Select I agree and click **Login to Salesforce**.



The screenshot shows the Salesforce Workbench login interface. At the top, there's a 'workbench' header with a blue cube icon. Below it, there are two dropdown menus: 'Environment' set to 'Sandbox' and 'API Version' set to '53.0'. A checkbox labeled 'I agree to the terms of service' is checked. Below this, a paragraph of text states: 'Workbench is free to use, but is not an official salesforce.com product. Workbench has not been officially tested or documented. salesforce.com support is not available for Workbench. Support requests for Workbench should be directed to Stackoverflow at <https://salesforce.stackexchange.com/questions/tagged/workbench>. Source code for Workbench can be found at <https://github.com/forceworkbench/forceworkbench> under separate and different license terms.' A 'Login with Salesforce' button is on the right. At the bottom, it says 'Workbench 54.0.0'.

3. Login to your Salesforce.
4. Navigate to the Object and select the '**OB_Archiver__ArchivingPolicy__c**' from the dropdown menu.
5. Select **Bulk CSV**.



The screenshot shows the Salesforce Workbench SOQL Query builder interface. At the top, there's a 'workbench' header with a blue cube icon and navigation tabs: 'info', 'queries', 'data', 'migration', and 'utilities'. Below the header, it says 'SOQL Query' and 'USER USER AT DORYARON COMPANY ON API 53.0'. A red banner message says: 'Visual Studio Code now includes a [SOQL Builder](#). Try it today!'. Below this, a text prompt says: 'Choose the object, fields, and criteria to build a SOQL query below:'. There are three sections: 'Object:' with a dropdown menu showing 'OB_Archiver__ArchivingPolix', 'View as:' with radio buttons for 'List', 'Matrix', 'Bulk CSV' (selected), and 'Bulk XML', and 'Deleted and archived records:' with radio buttons for 'Exclude' (selected) and 'Include'. Below these are 'Fields:' with a list of fields: 'count()', 'CreatedById', 'CreatedDate', 'Id', 'IsDeleted', and 'LastModifiedById'. There are also 'Sort results by:' dropdowns for 'A to Z' and 'Nulls First', and a 'Max Records:' input field. A 'Filter results by:' section has a dropdown menu, an equals sign, and an input field. At the bottom, there's a text prompt: 'Enter or modify a SOQL query below:' followed by a large text area. A 'Query' button is at the bottom left, and a help icon (?) is at the bottom right. At the very bottom, it says 'Requested in 0.430 sec' and 'Workbench 54.0.0'.

6. Select the fields from **Name** and include any fields with **OB_Archiver**.

Appendix B. Old Version of Retention Policy

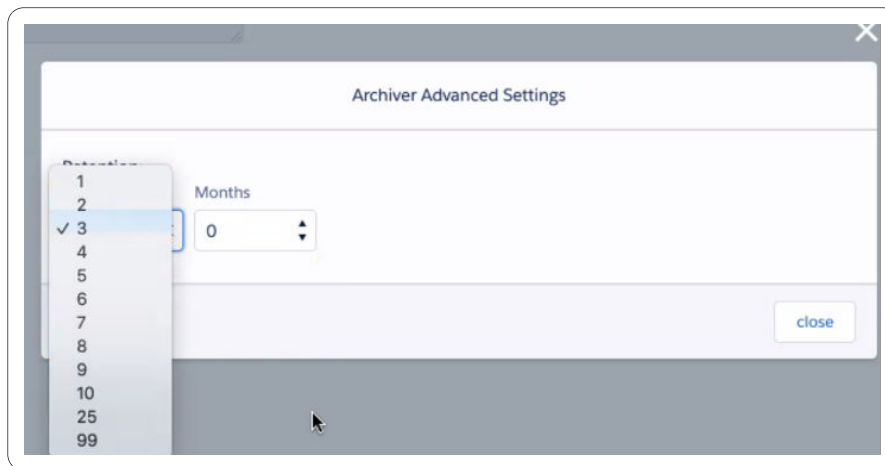
Retention allows you to configure when the archived records (the record and its related records) will be automatically purged.



NOTE

Retention relates to the archived date, not the record creation date.

- Min retention can be 1 month
- Max retention can be 99 years + 11 months



Creating a new Archiving Policy

1. Navigate to the Policies tab.
2. Click **New**. The New Policy window opens.

New Archiving Policy

Details Preview Table

Policy Information

* Policy Name
Test

Description

Enabled ☒

Schedule Policy (UTC)

* Every... * On * At
Month 1 12:00 AM

Your policy runs on the 31 of every month at 16:00 according to your salesforce instance timezone

Query Details

* Archive SObject
Account

Query
Manual

* SQL Query
SELECT Id FROM Account LIMIT 10

☐ Lookup relations archiving ⓘ

☐ Archive related content documents

Retention Policy

Years Month
3 0

Save Cancel

3. In the Policy Information section, enter values in the following fields:
 - a. **Policy Name:** Enter an identifiable name. (e.g. Inactive Cases Opened 2 Years Ago).
 - b. **Description:** Include a Policy Description.
 - c. **Enabled:** When set to off, policy scheduled execution is prevented.
 - d. **Schedule Policy (UTC):** Schedule the frequency to run the policy (Daily/ Weekly / Monthly). If applicable, additional options are displayed.
 - All dates and hours are in UTC, make sure to adjust the time according to your time zone.
 - When selecting Daily you are prompted for the Hour.
 - When selecting Weekly you are prompted for the day of the week (Sunday-Saturday) and then the Hour
 - When selecting Monthly you are prompted for the day of the month and then the Hour
4. In the Query Details section, you can run a query based on a list of objects in your org, and filter which records to archive.
 - **Archived SObject:** A list of objects in your org. Select any standard or custom object in the list. The selected object and all its related objects will be archived.
 - Filtering the Records to Archive:
 - Select by filter from the drop-down list under the Query section.
 - Set the limit of records.
 - Select the applicable option from the Take Action When drop-down list:
 - **All conditions are met:** Select this option when all the conditions in the condition builder should exist (similar to "AND" between conditions).

- **Any condition is met** : Choose this option when at least one of the conditions in the condition builder should exist (similar to “OR” between conditions).
- Select an object from the Field drop-down list.
- Select one of the arguments from the Operator drop-down list.
Dependent on the selected field’s type, the applicable operator will appear (=, >, <, Start with, End with, etc).
- Select the value you wish to filter by the results from the Value drop-down list.
- Click **Add Condition** to add an additional condition in the condition builder for more complex conditions.
- **Reset Query**: Will clear all the conditions built so far and allow you to start over.
- **Delete**: Will delete the reference condition.
- **SOQL Query**: Customize the SOQL query and create your own complex query.



NOTE

The SOQL Query is changed automatically by the condition builder and the fields selection when previewing the archived records.

- **Lookup Relations Archiving**: Once you select an Archive sObject, you can archive child objects under the selected object.
5. In the Preview Table tab, you can select the fields you want to see in the Preview table and on the Archiver Widget
 - Archived record visibility is defined by Salesforce profiles and permission sets.
 - In order to view the archived records in a parent or related object, you must first add the widget to the detailed page.
 6. Click **Save**.