

# Data Purge Process Model in SaaS Application

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## Abstract:

In today's fast paced environment wherein organizations are transforming to SaaS application from conventional application, the process and understanding of data purge process in SaaS application is very much required and vital. This paper explores the data purge process in Workday ERP and highlights a case study of how we can perform purge person data and the corresponding validation methods to validate the data before and after purge. This paper concludes with the prerequisite and considerations to be followed before we initiate the purge process.

**Keywords:** Workday, Person Data, Purge, Data, PII, Legal, SQL, MOM.

## 1. INTRODUCTION

Organizations from various industries who are transforming into Cloud Solutions should be aware of the purge process model in their respective SaaS applications. Purging data from SaaS application is different from conventional database applications wherein we can go execute SQL delete statements to delete the data. Users using SaaS application will not have direct access to the application backend database and it is not possible to purge/delete the data.

## 2. WHAT IS DATA PURGE?

**Data purge** refers to the process of permanently removing specific data from a system to ensure compliance with data protection laws and privacy regulations. This functionality is particularly important for managing personally identifiable information (PII) and other sensitive data.

### Functionality and Features

Data purging permanently deletes selected data from both primary and secondary storage locations. It is often part of a broader data management strategy, with features that allow for scheduled purging, selective purging based on specific criteria, and recursive or deep purging.

## 3. KEY ASPECTS OF DATA PURGE

- **Compliance:** Data purging helps organizations adhere to privacy regulations, such as the General Data Protection Regulation (GDPR) and privacy regulations.
- **Irreversibility:** Once data is purged, it cannot be recovered or reversed by the system.
- **Security:** Only authorized users who understand the implications of purging should be granted the ability to perform this action.
- **Use Cases:** Common scenarios for data purging include removing PII for terminated employees, candidates who applied for jobs, and purging outdated performance reviews.

## 4. BENEFITS

Data purging, when implemented correctly, can offer several key benefits. These include improved system performance, increased storage space, reduced data redundancy, and enhanced data security.

### **Case Study – Purge Person Data in Workday**

The following case study research on the option and model available to purge person data in Workday ERP. This study includes methodology, security, technical details, and the data validation process. This purge process is not intended to clone production environments to build other environments. This purge process is tenant specific and purging in one environment will not impact the other environment.

Purge Person Data is a functionality which is perform/used to remove certain personal data information of an employee to comply with data protection legislation. The key aspects of this process:

**Removal of Data:** It purges all Personal Identifiable Information (PII) attribute of an employee ensuring the data is no longer available.

**Compliance:** Data purging helps organizations adhere to privacy regulations, such as the General Data Protection Regulation (GDPR) and privacy regulations.

**Steps of the process:** This step is about reviewing key decisions to purge the data and execute the process.

**Historical Records:** The purge individuals are removed from searches and their PII is deleted. The purged person information will still exist in system as Purged person for historical headcount purposes.

#### **1. What can be purged?**

The following information can be purged in the Workday Application:

Active Workers	Cases
Candidates	Job Applications
Former Workers	Questionnaire
Terminees	Suppliers

#### **2. Ways of Purge Data**

There are 3 ways of purging data which are single instance, purge person data and Mass Operations Management

## **Ways of Purging**



**Figure 1: Ways of Purging**

**Single Instance:** Single Instance purging is a method used to delete specific attributes of data from an employee record like Date of Birth, Address etc.

**Purge Person Data:** This process is used to purge the entire set of data from a selected population.

**Mass Operations Management:** This is also known MOM which is used to purge the data on a recurring basis if required.

### 3. Key Decisions

The key decision of the purge is Who, What and How. The decision should be taken to identify the population to be purged like Employees termed in a year ago, then the specific data to be purge like personal data and finally the method of purging whether the purge is one time manual or it is a recurring one.

## Key Decisions(Who, What, How)



**Figure 2: Key Decisions of Purging**

### 5. PURGE STEPS

#### Step 1: Who (Population Identification)

The population to be selected for purge can be determined by building a custom report in Worker using All Workers business object and apply the filter where termination date is a year ago from the current. Note: This report can be built or modified based on organizational needs.

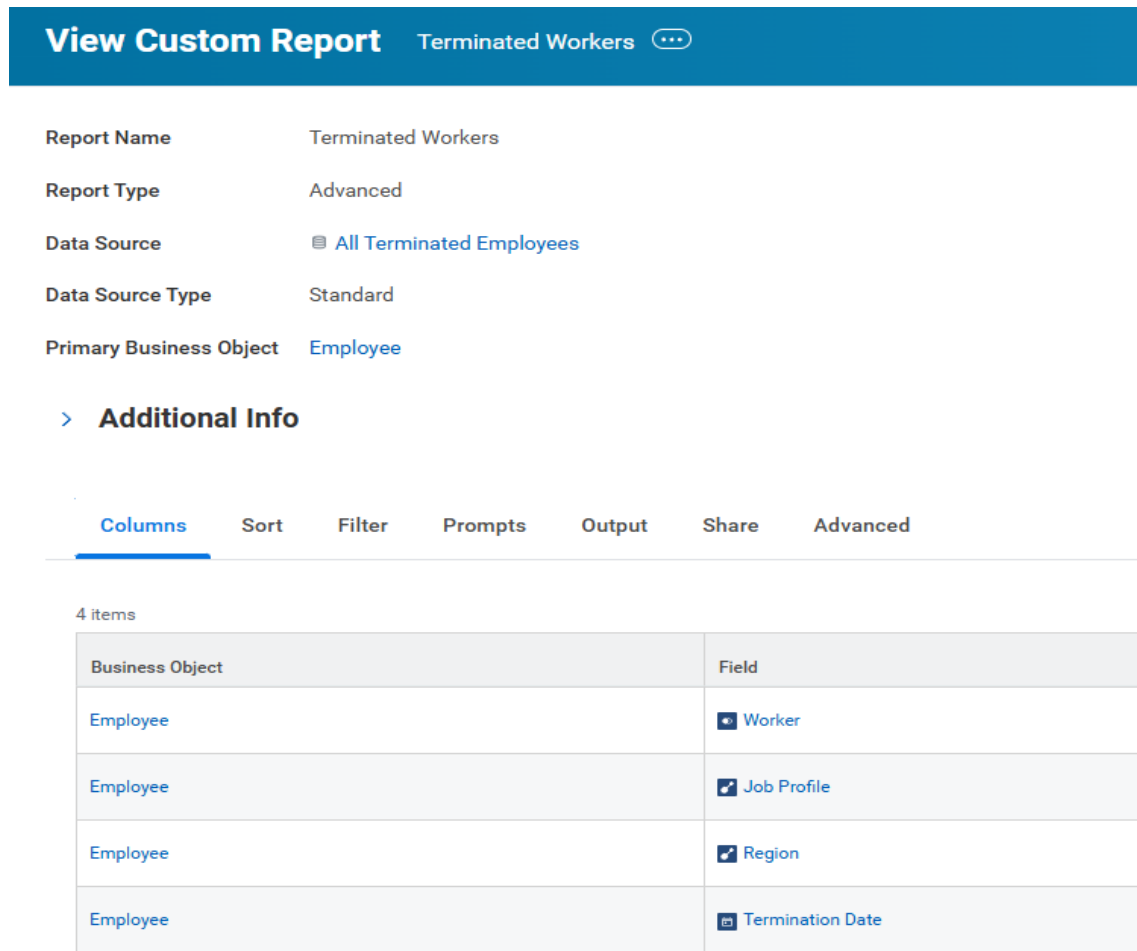


Figure 3: Sample Custom Report

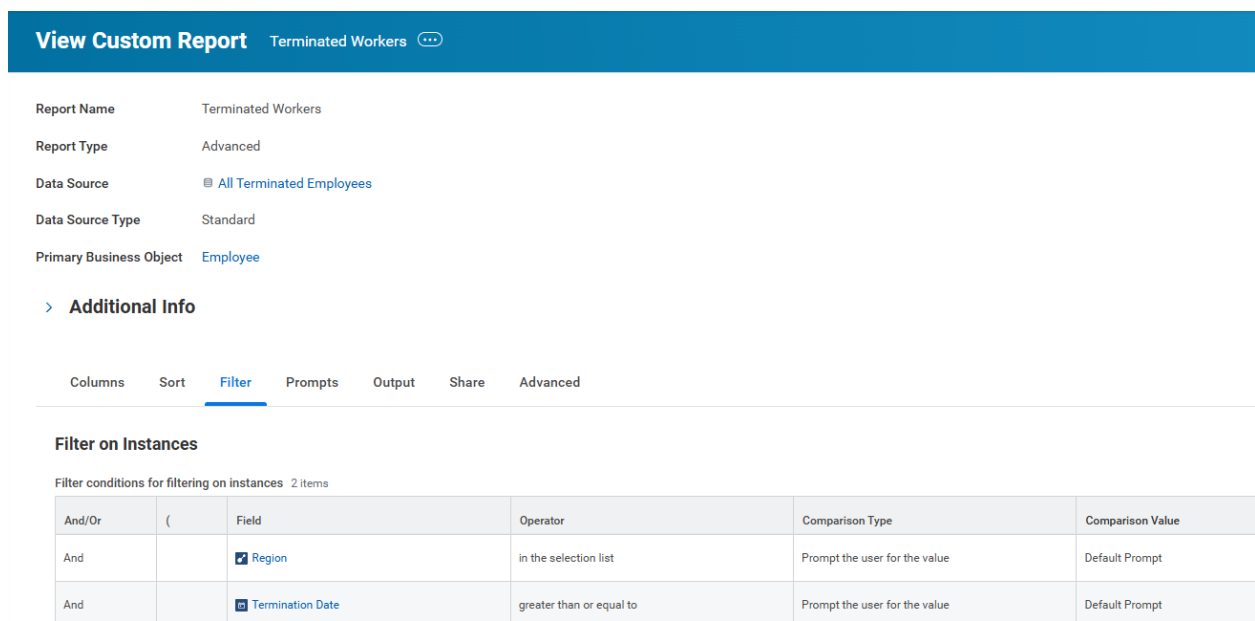


Figure 4: Custom Report Filter Condition

**Terminated Workers** ✕


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[View Report Definition](#)

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Region

Termination Date

MM/DD/YYYY 

Cancel

OK

**Figure 5: Report Run Parameters****2.Step 2 – What (Data Identification)**

The 2<sup>nd</sup> step is the main step of what data to be selected for purging like Personal Information or the entire data of the employee. This can be created using the Purge Plan Functionality. The “Create Purge Plan” Functionality will allow you to create a plan and the data attributes to be selected for purging.

**Create Purge Plan** ✕

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Copy From

Object to Purge

\* ✕ Worker

Custom Report Definition for Purge Plan

Cancel

OK

**Figure 6: Purge Plan Creation**

**Create Purge Plan**

Name \*

Object to Purge Worker

21 of 107 items

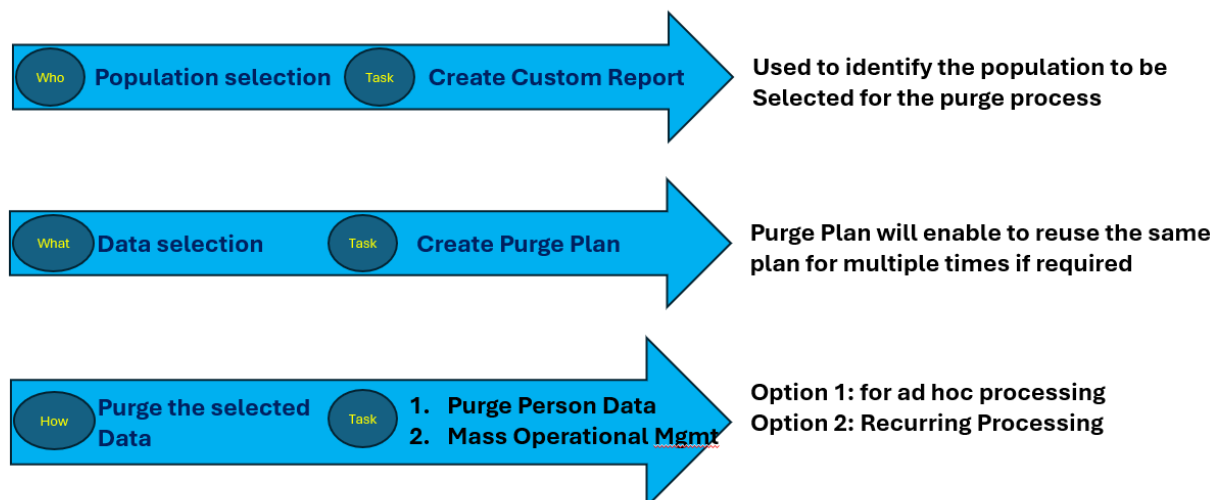
Select	Area	Data to be Purged	Purges Workers that are	Is Date-Driven
<input checked="" type="checkbox"/>	Personal Information	Worker's or Pre-Hire's Personal Information	Terminated	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Person's IDs	Additional Government IDs, Contingent Worker IDs, Custom IDs, Employee IDs, Licenses, National IDs, Passports, Reference IDs, and Visas	Terminated	<input type="checkbox"/>
<input type="checkbox"/>	Related Persons	Personal Information for Worker's Dependents, Beneficiaries, and Emergency Contacts	Terminated	<input type="checkbox"/>
<input type="checkbox"/>	Purge LinkedIn Person Data	The LinkedIn person, their attributes, and the link between the LinkedIn person and the candidate or worker. Also removes the relationship between the LinkedIn person's 1-Click Export record and the recruiter LinkedIn person.	Terminated	<input type="checkbox"/>

**Figure 7: Purge Plan Data Selection**

### 3.Step 3 – How (Single Run or Recurring)

The last step is the decision of the execution of the purge. We need to determine whether we need to run the purge once or it is a recurring one. If it is only one, then we can process the validation of the purge monitor for the results. If it is a recurring one, then we need to configure the **Mass Operational Management process** to process the same in scheduling

## Purge Steps



**Figure 8: Purge Steps**

## 6. PREREQUISITE SECURITY ACCESS

The prerequisite for the purge process is the security access permission for the processing user. Workday has a security domain specifically for the purge and this domain should be provisioned. We should configure and activate the Purge Person Data domain so that the appropriate security groups under the domain have access to purge tasks and the supporting reports.

View Domain

Purge Person Data

Domain Name

Purge Person Data

Description

This domain provides access to run purges of privacy-regulated data for all persons returned by the report selected.

Domain Security Policy

Q

Functional Areas

System

Subdomains

[Purge Customer](#)  
[Purge Single Entity Data](#)  
[Purge Supplier](#)

Allowed Security Group Types

Unconstrained Groups

Count of Secured Items

67

> Data Source Filters

> Data Sources

> Instance Sets

> Report Fields

> Reports and Tasks

**Figure 9: Purge Person Data – Domain**

View Domain Security Policy

Purge Person Data

Description

This domain provides access to run purges of privacy-regulated data for all persons returned by the report selected.

Status

Active

Functional Areas

System

Child Policies

[Purge Single Entity Data](#)

Allowed Security Group Types

Unconstrained Groups

Securable Actions

17

Securable Reporting Items

56

Report/Task Permissions 3 items

Security Groups	View	Modify
<a href="#">HR Administrator</a> <a href="#">Implementers</a> <a href="#">ISSG Run AS User</a> <a href="#">Phenom People Recruiting</a>	Yes	Yes
<a href="#">Senior Director of Talent Acquisition</a> <a href="#">TA Recruiter (Unconstrained)</a> <a href="#">TA Unrestricted Recruiting Access (Org Based)</a>	Yes	
<a href="#">HCM Unrestricted Recruiting Access (User Based)</a>	Yes	

Securable Actions by Integration Permissions

3

Securable Reporting Items by Integration Permissions

56

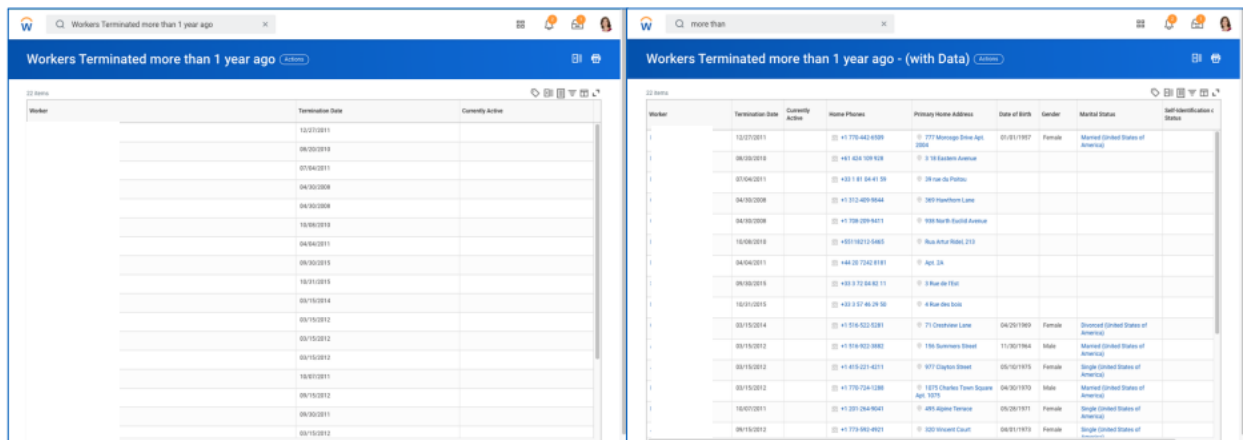
**Figure 10: Purge Person Data - Domain Security Policy**

## 7. DATA VALIDATION & TROUBLESHOOTING

The last step is validating data after the purge process is completed. The data can be validated by creating custom reports. It can be done in 2 ways. The first method is to have 2 separate reports, one with the data

without purging fields and another report with purging fields. Another method is to have a single report with purging fields in the same report and process the report to validate the data.

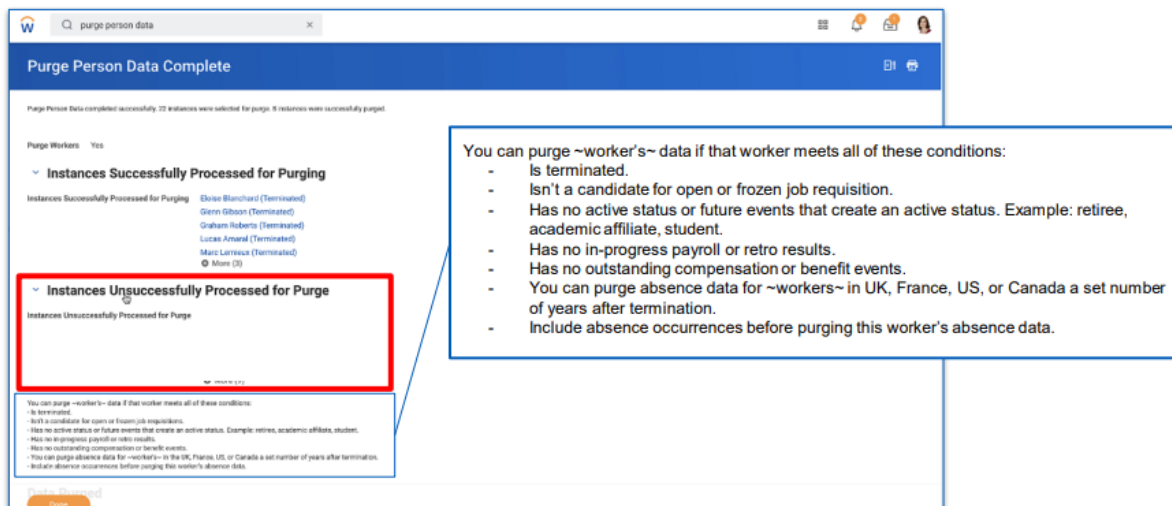
## Validation of Purge



Report used for Purging

Report used for Validation

## Troubleshooting of Purge



**Purge Person Data Complete**

Purge Person Data completed successfully. 22 instances were selected for purge. 8 instances were successfully purged.

Purge Workers: Yes

**Instances Successfully Processed for Purging**

Instances Successfully Processed for Purging: Elvise Blanchard (Terminated), Glenn Gibson (Terminated), Graham Roberts (Terminated), Lucas Armand (Terminated), Maria Larroza (Terminated), & More (3)

**Instances Unsuccessfully Processed for Purge**

Instances Unsuccessfully Processed for Purge: [List of workers]

You can purge ~worker's~ data if that worker meets all of these conditions:

- Is terminated.
- Isn't a candidate for open or frozen job requisition.
- Has no active status or future events that create an active status. Example: retiree, academic affiliate, student.
- Has no in-progress payroll or retro results.
- Has no outstanding compensation or benefit events.
- You can purge absence data for ~worker's~ in UK, France, US, or Canada a set number of years after termination.
- Include absence occurrences before purging this worker's absence data.

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- Has no in-progress payroll or retro results.
- Has no outstanding compensation or benefit events.
- You can purge absence data for ~worker's~ in the UK, France, US, or Canada a set number of years after termination.
- Include absence occurrences before purging this worker's absence data.

Figure 11: Data Validation & Troubleshooting

## CONCLUSION

This paper has researched about the needs of data purging especially in SaaS Application with a specific focus on Workday. Deletion of data from traditional database model is easy as the user has the access to execute delete SQL statements to delete the data based on the requirement whereas it is not easy in SaaS application as the users will not have access to the backend data. Also, the data structure of the SaaS application is not available for the users. So, the SaaS application needs to provide an option based on their model and the paper researched specifically about the option available to purge the person data in Workday. The paper illustrates the concepts of data purging and the key decisions to be made before we initiate the data purge process. Also, this research explains the key steps, process steps, security prerequisites and explains each step with the flow



and actual screenshot of the application. This research will help the organization to better understand the steps to be implemented to purge the person data in Workday.

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