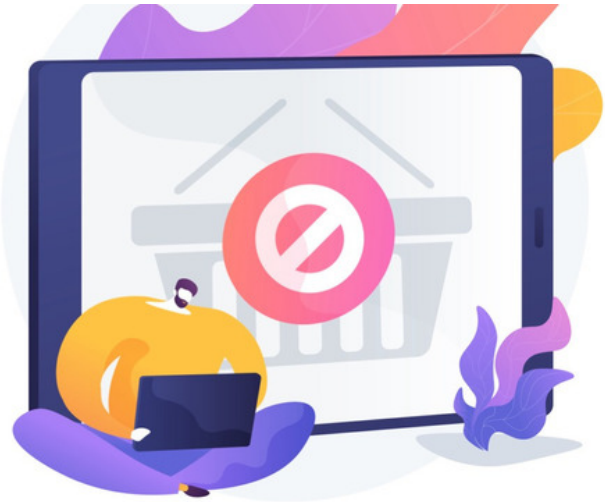
Link to article: https://discover.claromentis.com/knowledgebase/articles/963/deleting-tickets-in-infocapture



Deleting tickets in InfoCapture

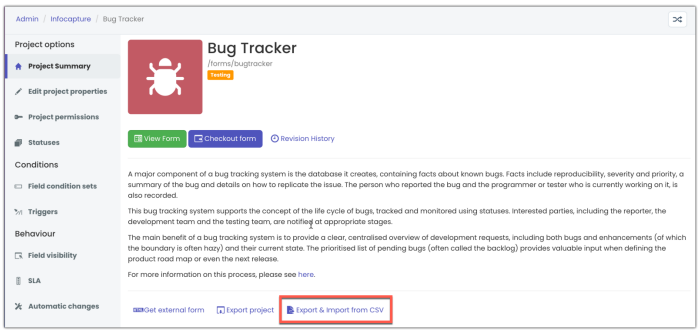
Infocapture tickets can be deleted individually, in batches using the built-in facility or in bulk via CSV.

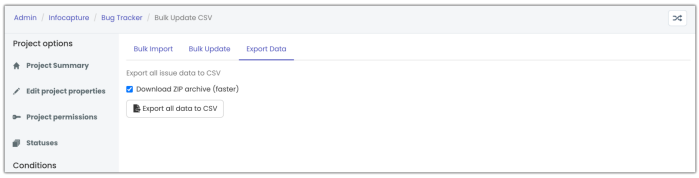
Vigilance around any deletions is required by the team member performing them as once deleted data is permanently removed and cannot be restored.

If you are going to be deleting Infocapture tickets:

1. Confirm with your team the deletions are appropriate and approved before proceeding.

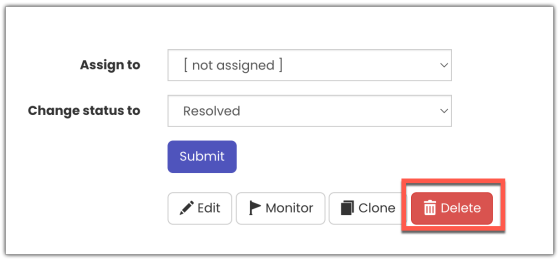
2. Consider exporting all the project ticket data to a CSV so that this is on file in case any deletions are made in error. Tickets can be re-imported to the system from this CSV.





Delete tickets individually

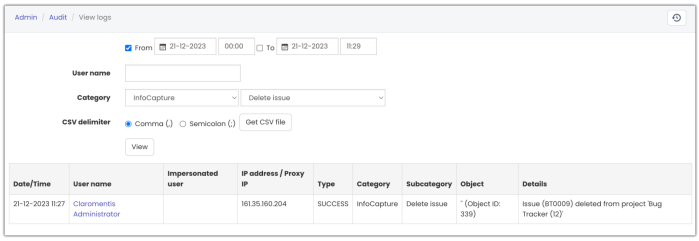
Only users with the 'Manage tickets' project permission will see the **Delete** option when in a ticket.



This will take the user to another screen to confirm they wish to delete the ticket:

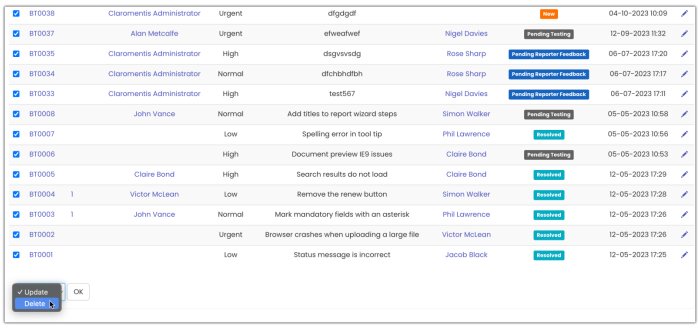
Clicking **Delete** will remove the ticket permanently and an on-screen message will confirm the ticket is removed.

The audit log will record the deletion and specify the ticket removed as below:



Delete tickets in batches

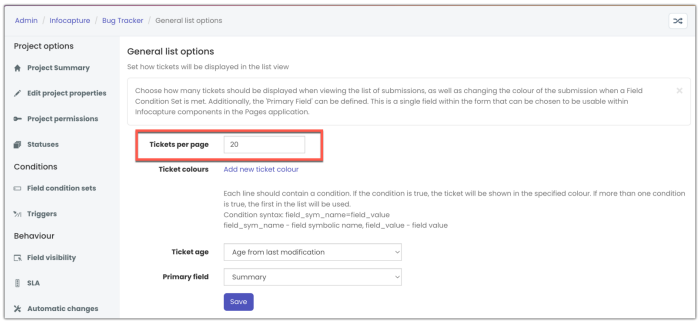
The built-in facility appears on the front end of a project in the ticket list:



The **Delete** option will only be able to be used by users with the 'Manage tickets' project permission.

1. Check the box next to each ticket you wish to delete (or 'Select all' on the current page) using the topmost checkbox.

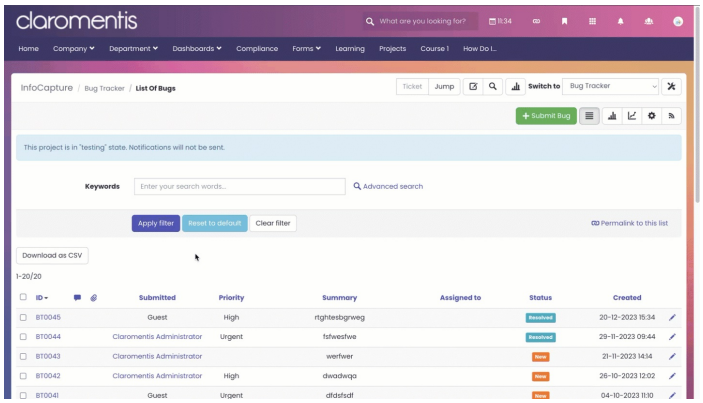
(The number of tickets that show on one page of the ticket list can be changed temporarily to assist with larger batch deletions)



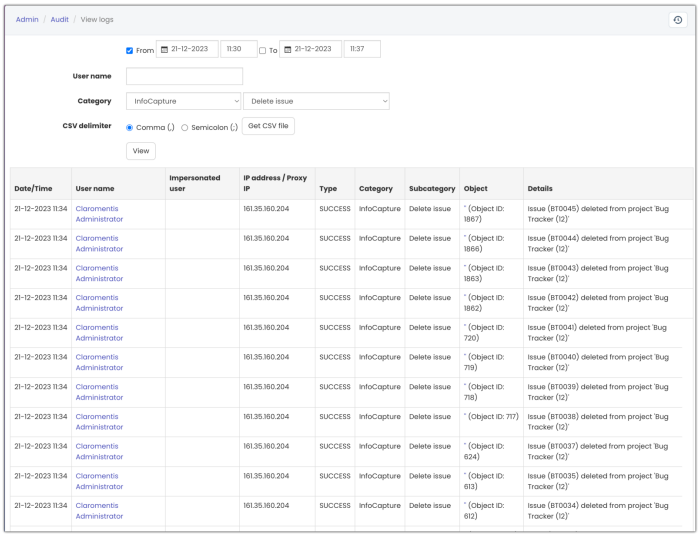
2. Scroll to the bottom of the screen select **Delete** and then click **OK**.

3. The screen will list all the tickets to be deleted, scroll to the end of the page and select **Delete** a final time to complete this.

4. An on-screen message will confirm how many were removed as shown here:



Batch deletions using this facility will also be recorded in the audit log as below:



Delete tickets in bulk via CSV

The **Bulk update** option can be used to delete tickets en masse.

For this method, we strongly recommend exporting all tickets to a CSV ahead of any deletions to ensure these are on file in case any removals made are in error, needed tickets can be restored from this CSV.

If you are concerned about performing the bulk deletions yourself or would like some advice before proceeding, please raise asupport ticket and we can assist you with this.

Here is a bulk deletion of tickets being carried out for a project:

Your browser doesn't support video.
Please download the file. video/mp4

1. Export all data to a CSV using the option and then open the file locally.

2. Scroll to the right and locate the last column which will be titled 'input-delete'.

This will have a zero in each row which denotes 'retain' for that ticket.

3. For any ticket you wish to delete update this to a '1' which means 'delete'.

Optional step but recommended for deletions of large numbers of tickets

Remove any ticket being retained (where zero is in the 'input-delete' column) from the CSV so the file only contains tickets to be deleted ('1' in the 'input-delete' column). This means when importing the file deletions those left out will not be referenced.

Even if you leave those being retained in the CSV they will simply be referenced as 'imported' when they are effectively unchanged.

Whereas taking those being retained out of the CSV is beneficial because it makes the file the system has to process smaller, which is necessary if you wish to delete large numbers of tickets.

If you're deleting less than tickets this likely is negligible.

If you are, however, deleting between 200 and 1000 tickets we recommend ensuring the CSV only includes tickets to be deleted to guarantee this completes successfully.

If you need to delete more than 1000 tickets you will need to perform the deletions in batches and we would recommend using CSVs that only contain deletions for this.

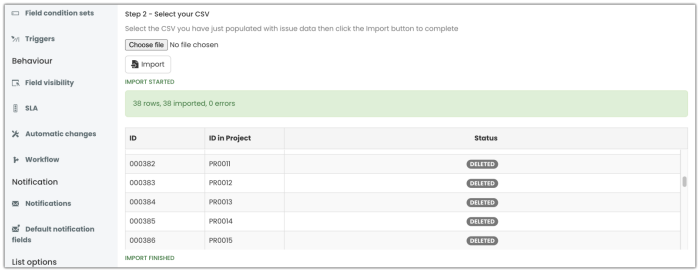
4. Once complete, save the file as a CSV.

5. Now in the 'Bulk import' tab of the project, upload the edited CSV that contains your deletions to the 'Step 2' area.

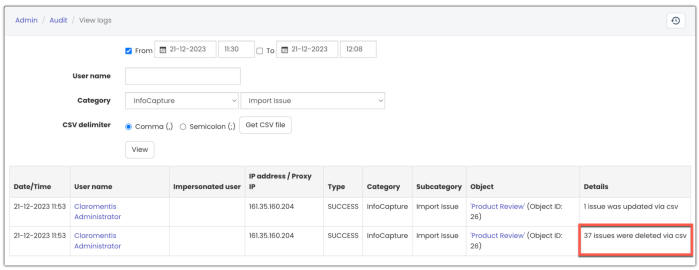
THIS IS THE POINT OF NO RETURN - TICKETS WILL BE PERMANENTLY ERASED WITH THE NEXT STEP

6. Select **Import** and the system will process the deletions, displaying this in a table on the screen.

7. Once it completes, all the tickets with '1' against them in the CSV will have been permanently deleted.



The audit log will reflect the bulk deletion via CSV - it will specify how many were deleted but it will not list these individually:



If tickets are deleted in error using the bulk CSV method it is NOT possible to tell which tickets were included when the deletions took place - another reason for vigilance ahead of deletions as the losses for this method cannot be tracked.

However, if you exported all ticket data from the project before proceeding with the deletions any tickets now needed can be restored byre-importing them in the 'Bulk import' area.

For this to be successful remove the 'ID' and 'ID in project' columns from the file you exported with all the tickets and save this, it will now allow the tickets within it to be imported back into the project successfully.

Created on 21 December 2023 by Hannah Door. Last modified on 3 January 2024
Tags: delete, infocapture, tickets