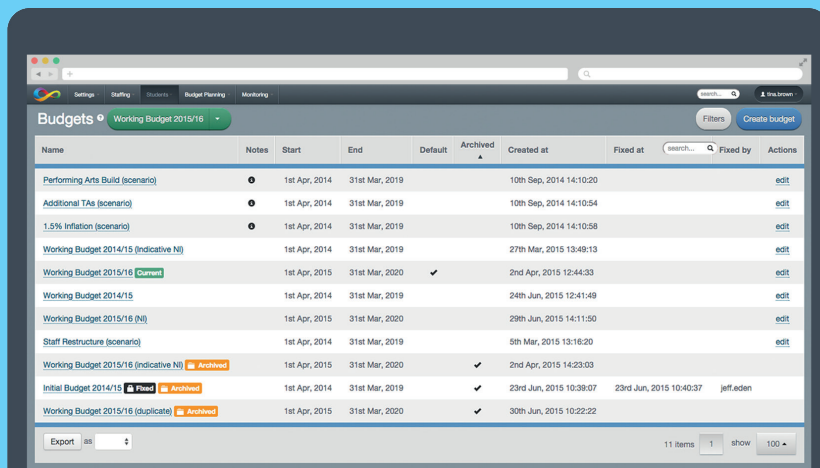




SBS Online July Update

Archiving



Archiving

If you have stopped using items in your planner but can't delete them because they are in use, then archiving is a way to hide them and prevent future usage.

The following items can be archived:

- Budgets
- Staff members
- Custom reporting codes
- Budget codes
- Unmappable codes
- Cost centres
- Service terms
- Analysis tags
- Contract types
- Custom salary scales

Archiving budgets

Archiving a budget sends it to the bottom of the list in the budgets screen, flags it with an orange 'archived' tag, prevents it from being edited and hides it from view in the green current budget bar.

You can archive any budget (including fixed budgets) except the current budget and/or the default budget.

To archive a budget

1. Go to **'Settings > Budgets'**
2. Click on the name of the budget you want to archive
3. Click on the orange **'Archive'** button

To unarchive a budget

1. Go to **'Settings > Budgets'**
2. Click on the name of the budget you want to unarchive
3. Click on the orange **'Unarchive'** button

Archiving other items

The process to archive other items in your planner is also straightforward.

Simply navigate to the appropriate section and follow these instructions:

1. Edit the item to be archived
2. Check the **'Archived'** tickbox
3. Click **'Save'**

Archiving an item does not mean that it will stop functioning if it is in use, so you can use this feature with confidence. Generally speaking, archiving other items (such as budget codes and staff members) removes them from drop down lists so that they can't be used in the future. The exception to this rule is if you edit something which uses an archived item. For example, you might archive an analysis tag and subsequently edit a budget entry with this tag applied to it. In this case you would see the tag at the bottom of the drop down list under an **'Archived'** subtitle.

However, when creating anything new in your planner, if you want to apply an archived item, you will need to unarchive it first. To unarchive, navigate to the appropriate section and:

1. Edit the item to be unarchived
2. Uncheck the **'Archived'** tickbox
3. Click **'Save'**

Contract types

One additional piece of guidance concerns contract types.

Archiving works like the other items, but because you might have contracts assigned to them which are active in your budget, you will always see the settings for **'region'**, **'hours per week'**, **'weeks per year'** and **'salary year start'** for archived contract types when you edit a budget. However, when you click on a budget name and view the settings, they will be hidden. To show them, click the double arrow and the page will expand to show the settings for archived contract types.

If you have any questions about archiving, please contact the Service Desk on **0845 300 8179**.