



SBS Online July Update

Archiving

Settings - Statting - Students - Budget Planning -	Monitoring -							search Q	± tins.brown -
Budgets • Working Budget 2015/16 • Effers Create budget									
Name	Notes	Start	End	Default	Archived	Created at	Fixed at (search	Q Fixed by	Actions
Performing Arts Build (scenario)	0	1st Apr, 2014	31st Mar, 2019			10th Sep, 2014 14:10:20			edit
Additional TAs (scenario)	0	1st Apr, 2014	31st Mar, 2019			10th Sep, 2014 14:10:54			edit
1.5% Inflation (scenario)	0	1st Apr, 2014	31st Mar, 2019			10th Sep, 2014 14:10:58			edit
Working Budget 2014/15 (Indicative NI)		1st Apr, 2014	31st Mar, 2019			27th Mar, 2015 13:49:13			edit
Working Budget 2015/16 Current		1st Apr, 2015	31st Mar, 2020	~		2nd Apr, 2015 12:44:33			edit
Working Budget 2014/15		1st Apr, 2014	31st Mar, 2019			24th Jun, 2015 12:41:49			edit
Working Budget 2015/16 (NI)		1st Apr, 2015	31st Mar, 2020			29th Jun, 2015 14:11:50			edit
Staff Restructure (scenario)		1st Apr, 2014	31st Mar, 2019			5th Mar, 2015 13:16:20			edit
Working Budget 2015/16 (indicative NI) 🚔 Archived		1st Apr, 2015	31st Mar, 2020		*	2nd Apr, 2015 14:23:03			
Initial Budget 2014/15 🚔 Fixed 🚔 Archived		1st Apr, 2014	31st Mar, 2019		~	23rd Jun, 2015 10:39:07	23rd Jun, 2015 10:40:3	7 jeff.eden	
Working Budget 2015/16 (duplicate) 🚞 Archived		1st Apr, 2015	31st Mar, 2020		*	30th Jun, 2015 10:22:22			
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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

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Staff members

Budget codes

Custom reporting codes

Unmappable codes

- Analysis tags
- Contract types

Cost centres

Service terms

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**.