Archiving

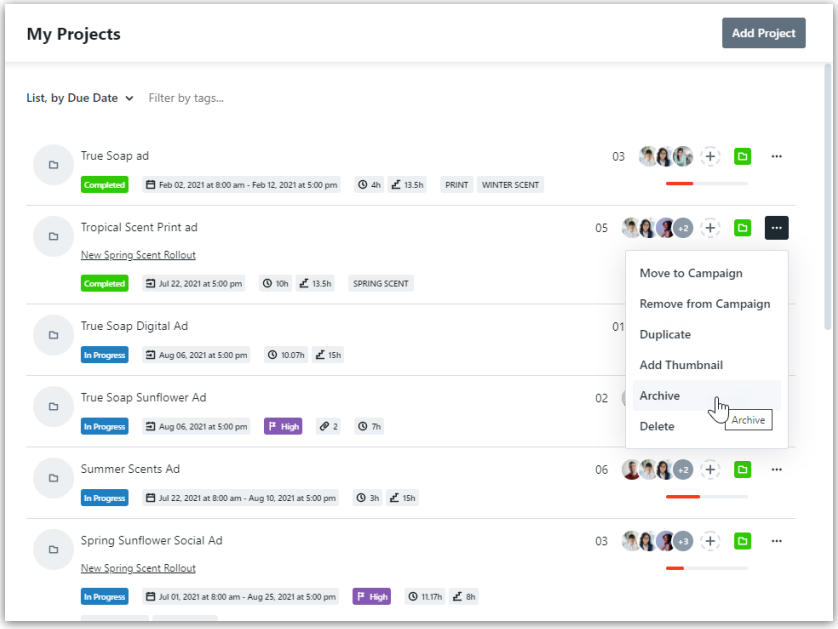
Published on 01/27/2022

Archiving is a best practice for any workflow. Archiving allows you to keep your views organized with relevant projects, work items, and requests, while still having a record of past work to reference. Additionally, archiving is reversible so you don't risk potentially losing important work.

Archiving Individual Items

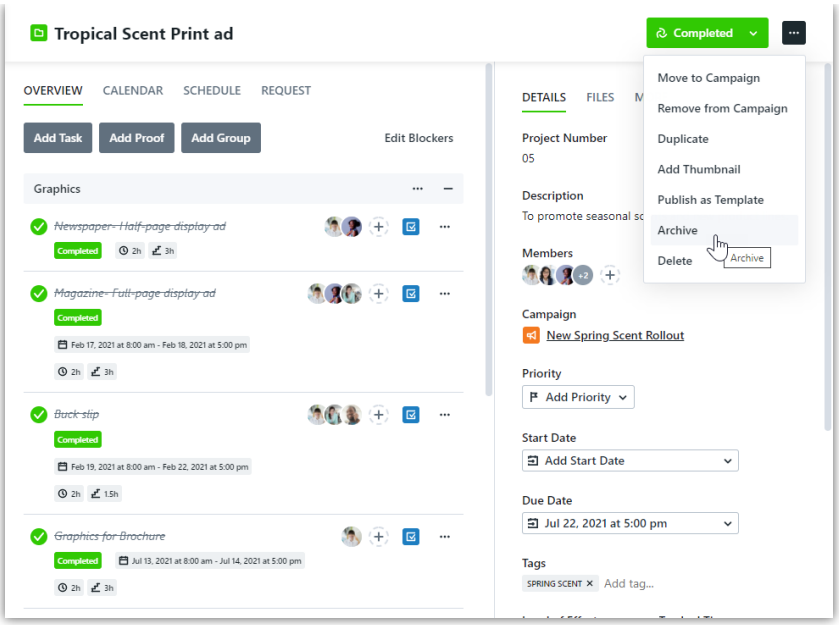
You have the ability to archive campaigns, projects, tasks, proofs, and requests. There are a few methods that work the same for any item.

From your list views, click the actions menu to the right of the item and select **Archive**.



Additionally, items can be archived within the item by clicking the actions menu in the top right corner and selecting **Archive**.

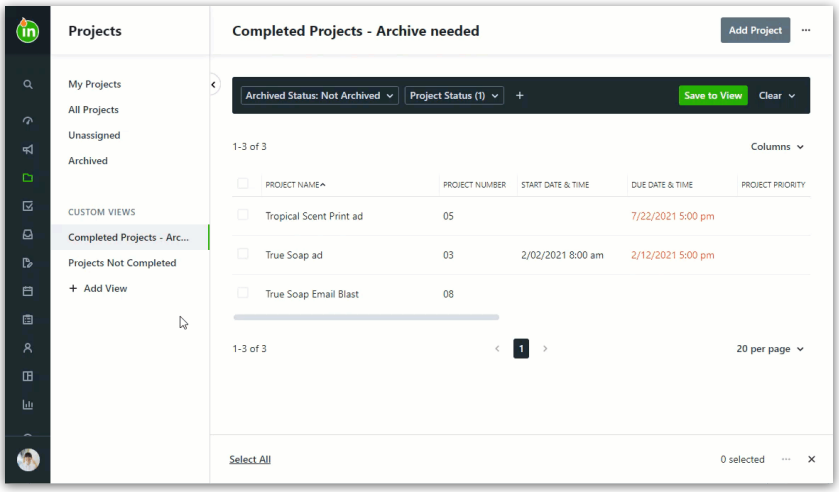
© 2019 inMotionNow, Inc. - All Rights Reserved



Archiving is hierarchal. For example, when archiving a project, all of the associated tasks and proofs will be archived as well.

Bulk Action Archiving

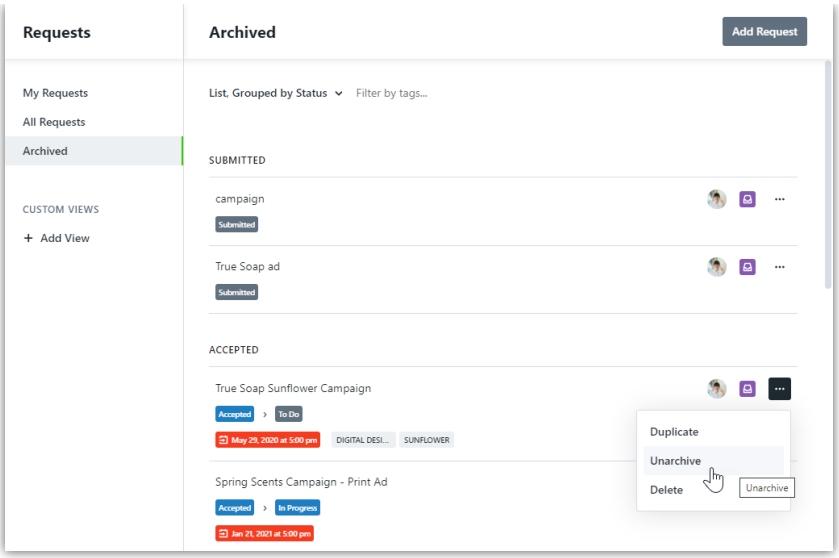
Within custom views you have the ability to bulk archive work. For the example below, a custom view has been created for all completed projects so that these can be regularly monitored and archived when needed. Select the boxes to the right of the appropriate items and click the actions menu in the bottom right corner of the screen. Select **Archive All** and confirm your selection to archive.



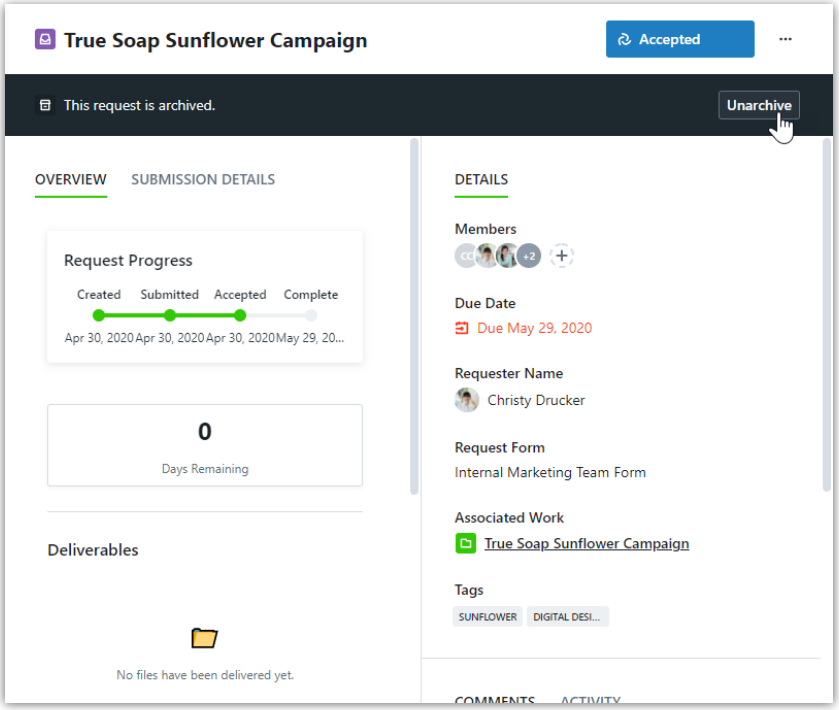
Unarchiving

Work can be unarchived at any time. From your list views, select the actions menu to the right of the archived item and select **Unarchive.**

© 2019 inMotionNow, Inc. - All Rights Reserved



Within an archived item, a banner will display across the top with a button to unarchive. Additionally, clicking the actions menu in the top right corner will provide an option to unarchive.

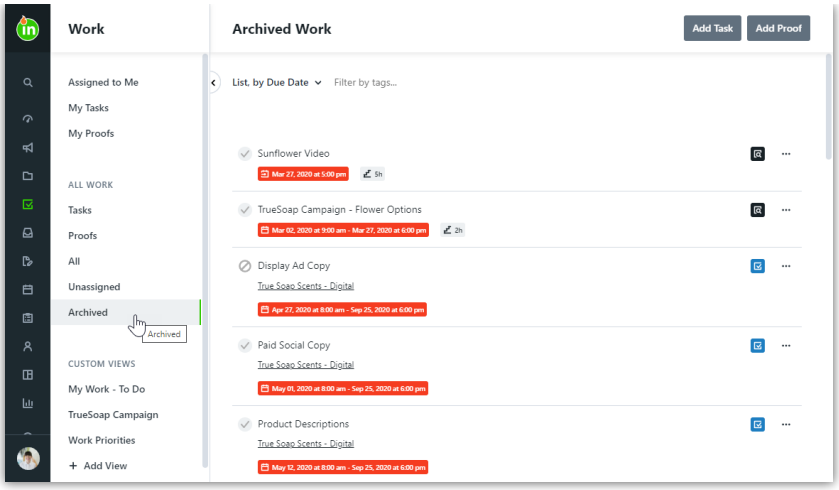


Searching for Archived Items

By default, archived items will be filtered out of your views. There are a few ways to view archived items when needed.

Within your list views, select **Archived** on the left side of the screen to view archived items.

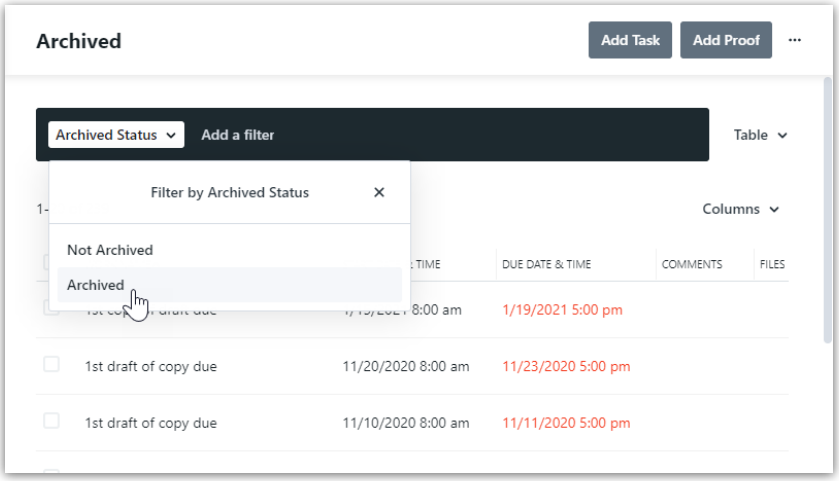
© 2019 inMotionNow, Inc. - All Rights Reserved



When using Global Search, select **Options** and toggle on **Include Archived** to expand your search to archived items.



Within Custom Views and Reports a filter can be applied to include archived items.



© 2019 inMotionNow, Inc. - All Rights Reserved