



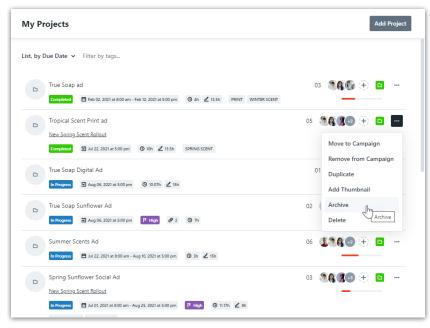
Published on 08/11/2021

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

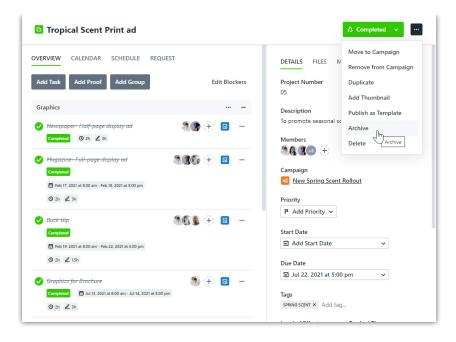
You have the ability to archive campaigns, projects, tasks, proofs, and requests. There are a few methods that work the same for any item.

From your list views, click the actions menu to the right of the item and selectArchive.



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





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.

٥	Projects	Completed Projects - Archive needed				Add Project	
0 6 7 5 9	My Projects All Projects Unassigned Archived CUSTOM VIEWS Completed Projects - Arc	Archived Status: Not Archived v 1 Archived	Project Status (1) v + PROJECT NUMBER 5 05	START DATE & TIME	Save to Vic DUE DATE & TIME 7/22/2021 5:00 pm	Clear V Columns V PROJECT PRIORITY	
B	Projects Not Completed	True Soap ad	03 2	2/02/2021 8:00 am	2/12/2021 5:00 pm		
	+ Add View	True Soap Email Blast	08	>		20 per page 💙	
۲		Select All			0 s	elected ··· ×	

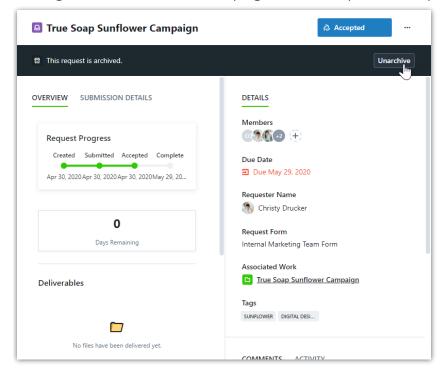
Unarchiving

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**.



Requests	Archived	Add Request
My Requests All Requests	List, Grouped by Status v Filter by tags	
Archived	SUBMITTED	
CUSTOM VIEWS + Add View	campaign Gdowithod	۰۰ 🕲 🧑
	True Soap ad	۰۰۰ 🕲 🛞
	ACCEPTED	
	True Soap Sunflower Campaign	۰۰ 🕲 🛞
	Accepted To Do To Do May 20, 2020 at \$00 pm DigitAL DESL SUNFLOWER	Duplicate
	Spring Scents Campaign - Print Ad Accepted > In Progres	Delete Unarchive
	🚍 Jan 21, 2021 at 5:00 pm	

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.



٥	Work	Archived Work	Add Task Add Proof
۹	Assigned to Me	List, by Due Date Filter by tags	
â	My Tasks		
圮	My Proofs	Sunflower Video	a
	ALL WORK	🖹 Mar 27, 2020 at 5:00 pm 🛛 🛃 Sh	
	Tasks	TrueSoap Campaign - Flower Options	<u>ه</u>
Ω	Proofs	🛱 Mar 02, 2020 at 9:00 am - Mar 27, 2020 at 6:00 pm 🛛 🛃 2h	
B	All	Display Ad Copy	
8	Unassigned	True Soao Scents - Digital	
Ē	Archived	🛗 Apr 27, 2020 at 8:00 am - Sep 25, 2020 at 6:00 pm	
8	Archived	✓ Paid Social Copy	
œ	CUSTOM VIEWS	True Soap Scents - Digital	
ա	My Work - To Do	🛱 May 01, 2020 at 8:00 am - Sep 25, 2020 at 6:00 pm	
ш	TrueSoap Campaign	Product Descriptions	
	Work Priorities	True Soap Scents - Digital	-
1	+ Add View	🛱 May 12, 2020 at 8:00 am - Sep 25, 2020 at 6:00 pm	

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

	Q Search	٩	Options V X	Add Task Add Proof
٩			Include Archived	
৵				

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

Archived Status Add a filter Filter by Archived Status	×				able ∙ nns ∽
Not Archived		: TIME	DUE DATE & TIME	COMMENTS	FILES
Archived	1/10/2021	8:00 am	1/19/2021 5:00 pm		
1st draft of copy due	11/20/2020	0 8:00 am	11/23/2020 5:00 pm		
1st draft of copy due			11/11/2020 5:00 pm		