Include or Exclude Archived Data

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Overview

This article provides a brief overview of including or excluding archived data in reports, when searching a relationship or reference field on a form, or when using the **Search** function. For instructions on archiving objects, see the Archive Data article.
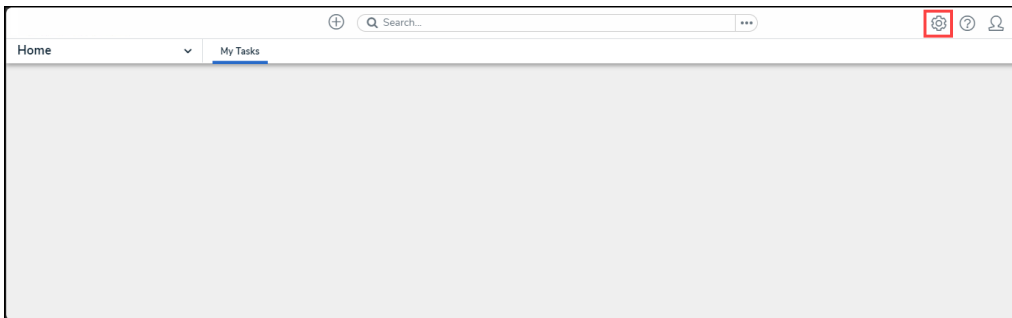
Reports, forms, and roles created before Version 3.0 are configured to **include** archived data by default. All reports, relationship/reference elements, and roles created after Version 3.0 **exclude** archived data by default.

Reports

The ability to include or exclude archived objects is not supported on other data visualizations (i.e., data grids or analytics export reports).
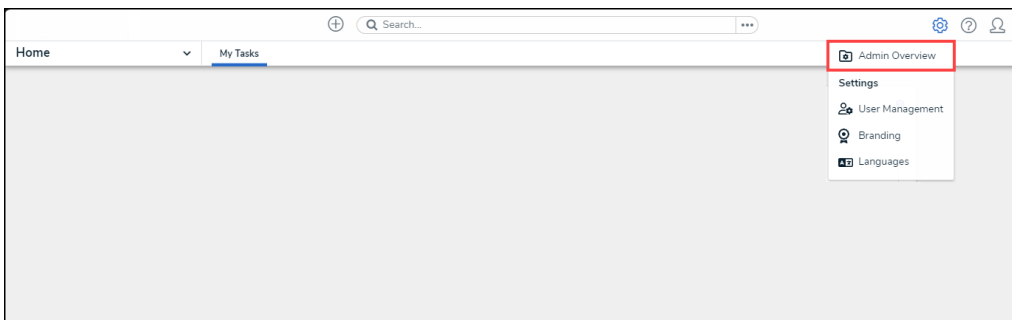
Navigation

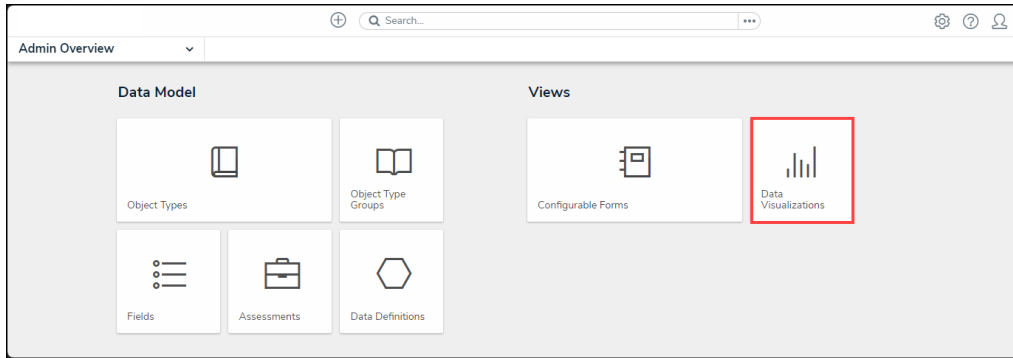1. From the **Home** screen, click the **Administration** icon.

Administration Icon

2. From the **Administration Settings** dropdown, click the **Admin Overview** link.
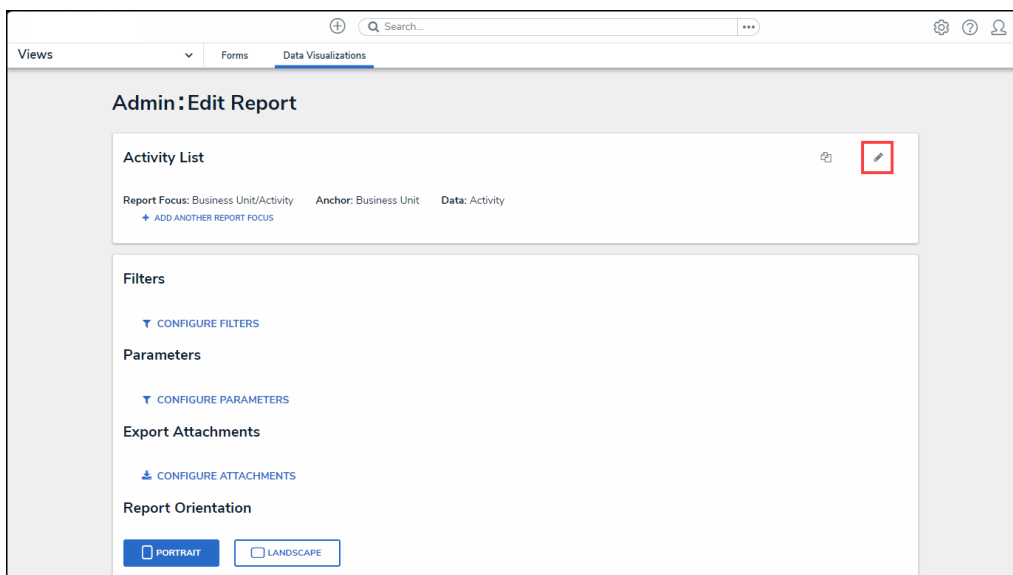

Admin Overview Link

3. From the **Admin: Overview** screen, click the **Data Visualization** tile from under the **Views** section.
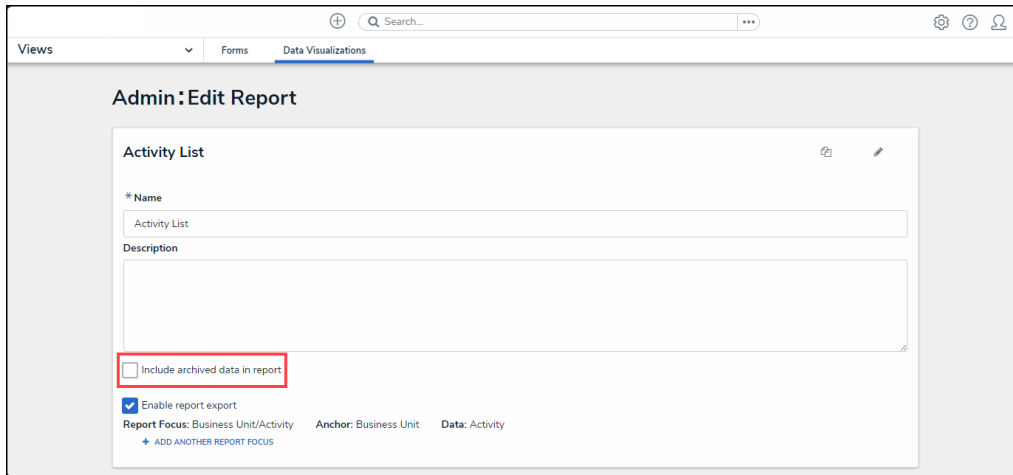
Data Visualization Tile

Including or Excluding Archived Objects from Reports

1. From the **Admin: Data Visualization** screen, create a new report or open an existing one to view the **Admin: Edit Report** screen.

2. Click the **Edit** icon at the top-right of the first section on the **Admin:Edit Report** screen.

Edit Icon

3. Click **Include archived data in report** to select or deselect the checkbox.
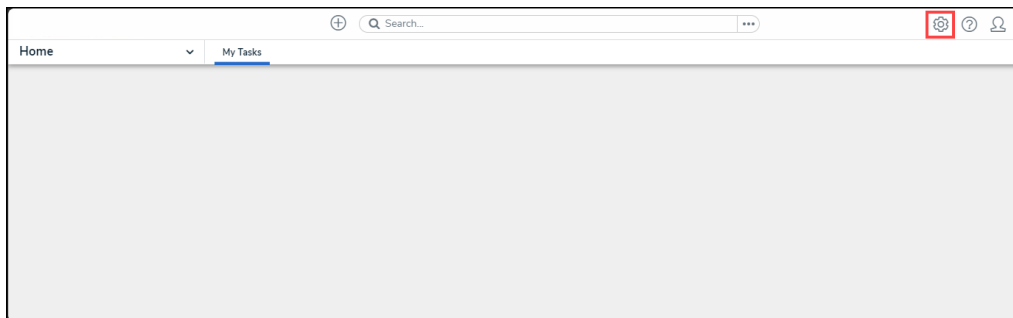
Include archived data in report Checkbox

4. Click the **Edit** icon when finished.

Relationships & References

When archived data is included on relationship or reference elements with the search option enabled, users can search for, select, and/or view archived objects through those element(s) on a standard configurable form.
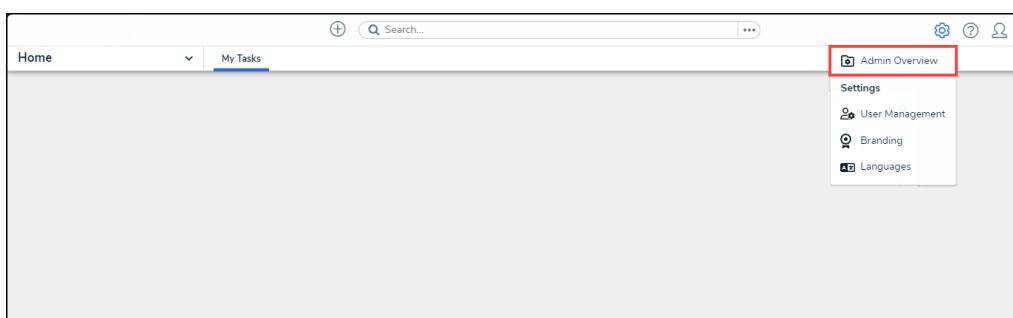
Navigation

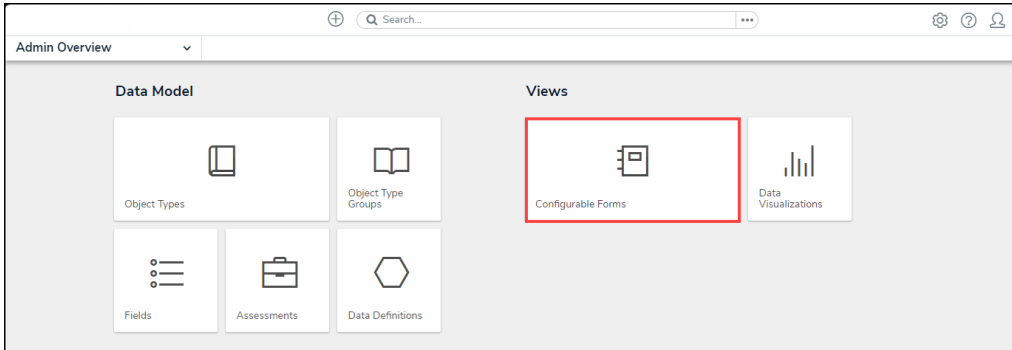1. From the **Home** screen, click the **Administration** icon.

Administration Icon

2. From the **Administration Settings** dropdown, click the **Admin Overview** link.
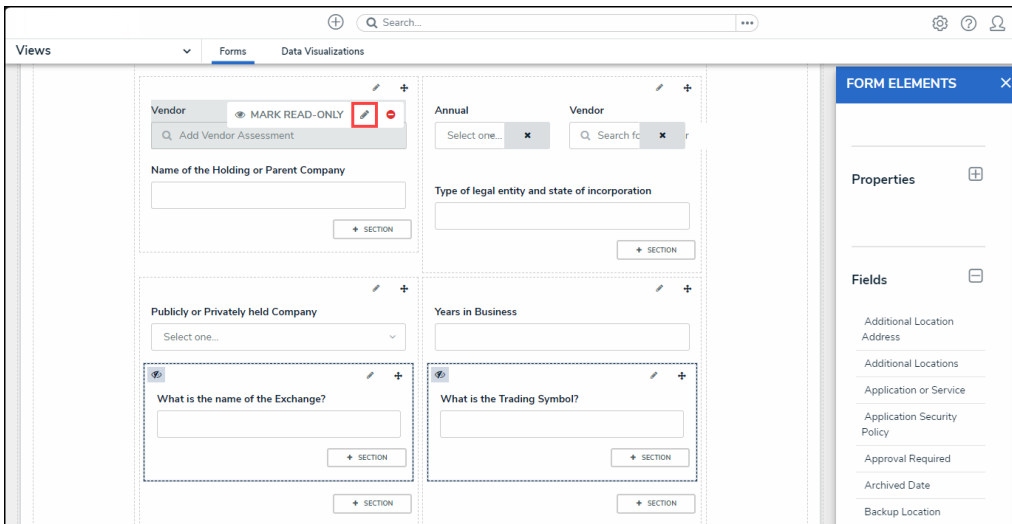
3. From the **Admin: Overview** screen, click the **Configurable Forms** tile from under the **Views** section.
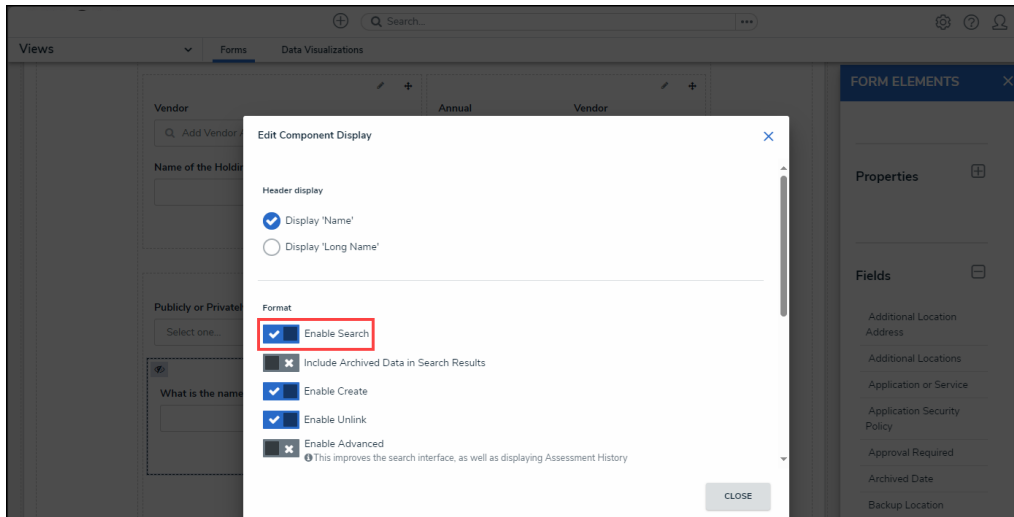

Configurable Forms Tile

Include or Exclude Archived Objects from Relationship and Reference form Elements

1. From the **Admin: Configurable Forms** screen, create a new standard form or open an existing one to view the **Admin: Edit Configurable Form** screen.

2. If required, add a relationship or reference element to the canvas.

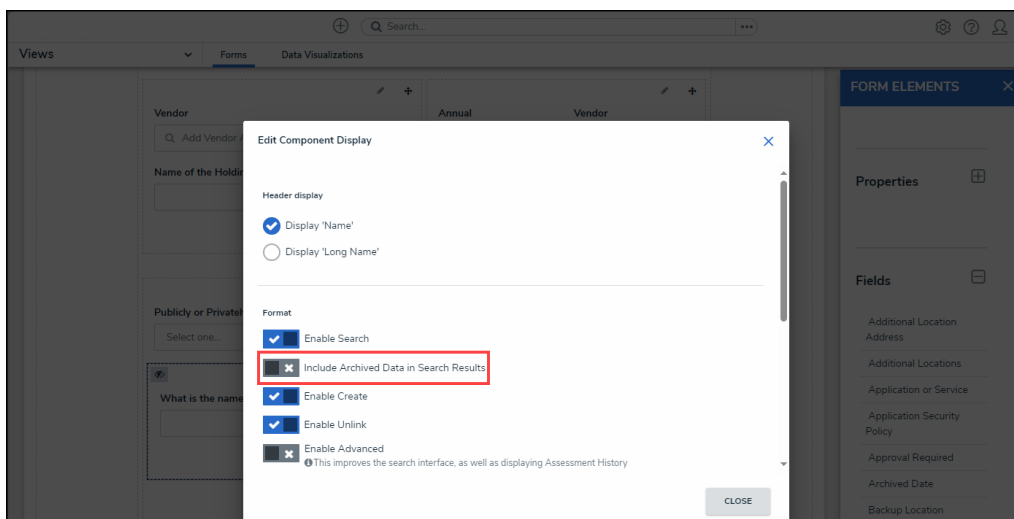3. Hover your cursor over the relationship or reference element and click the **Edit** icon.

Edit Icon

4. From the **Edit Components Display** screen, click the **Enable Search** toggle switch to activate the function. The **Include Archived Data in Search Results** option will not be visible if the **Enable Search** option is not enabled.

Enable Search Toggle Switch

5. Click the **Include Archived Data in Search Results** toggle switch to enable or disable the end-user's ability to search for or view archived objects through the form element.

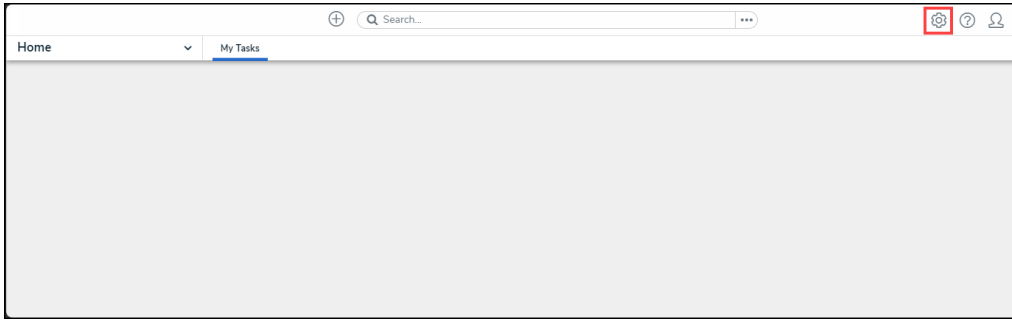*Include Archived Data in Search Results Toggle Switch*

6. Click the **Close** button when finished.

Search

Enabling **Archived Search** on a role allows users to enable the **Include Archived Data** option when searching the organization for objects. Note that if a user is in multiple roles and **Archive Search** is disabled on one role, but not the other, the user may still be able to perform a search of archived objects or vice versa.
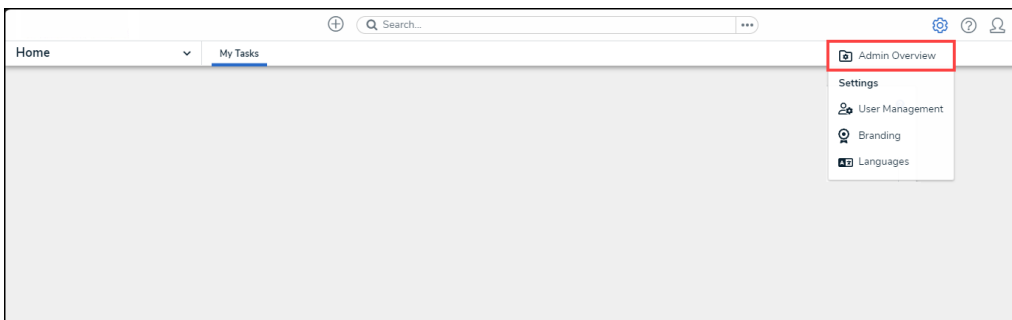
Navigation

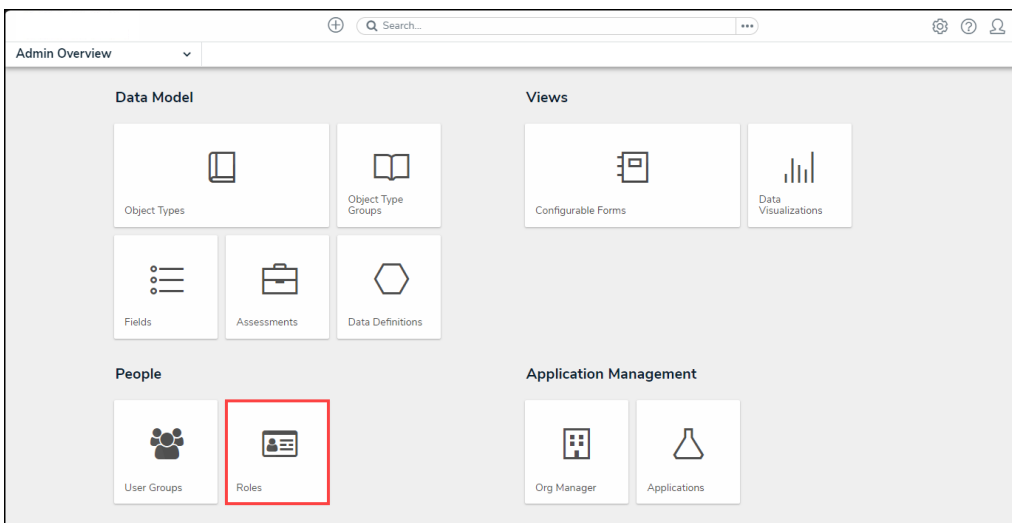1. From the *Home* screen, click the **Administration** icon.

Administration Icon

2. From the **Administration Settings** dropdown, click the **Admin Overview** link.
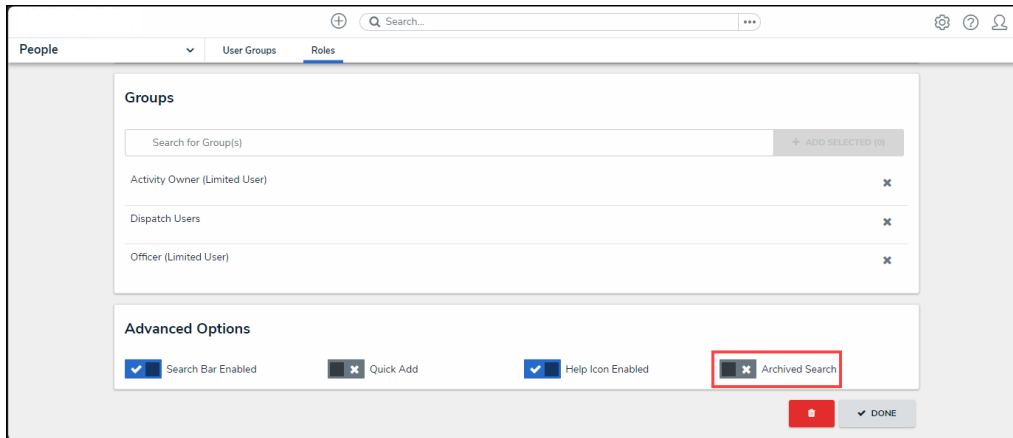

Admin Overview Link

3. From the ***Admin: Overview*** screen, click the **Roles** tile from under the **Views** section.

Roles Tile

Enabling or Disabling Archived Object Searches for a Role

1. From the ***Admin: Roles*** screen, create a new role or open an existing one to view the ***Admin: Edit Role*** screen.

2. From the ***Admin: Edit Roles*** screen, click the **Archived Search** toggle switch in the **Advanced Options** section to enable or disable the end-user's ability to search for archived objects.

Archived Search Toggle Switch
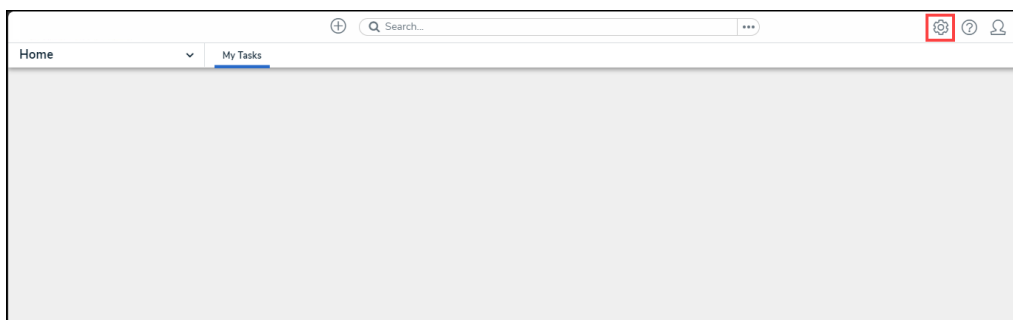
3. Click **Done** when finished.

Navigation Forms

Users can now choose whether to include archived data in the nav tree of Navigation Forms.

All existing Navigation Forms will have this feature enabled, and Administrators will need to uncheck the box to not display archived data in Navigation Forms. New forms will have the feature disabled by default.
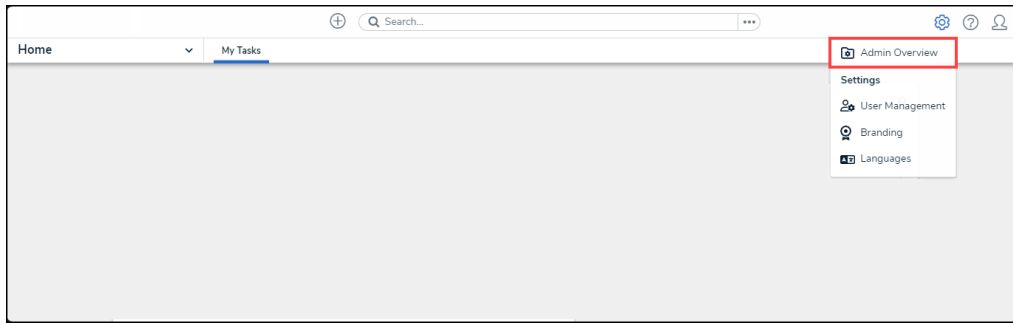
Navigation

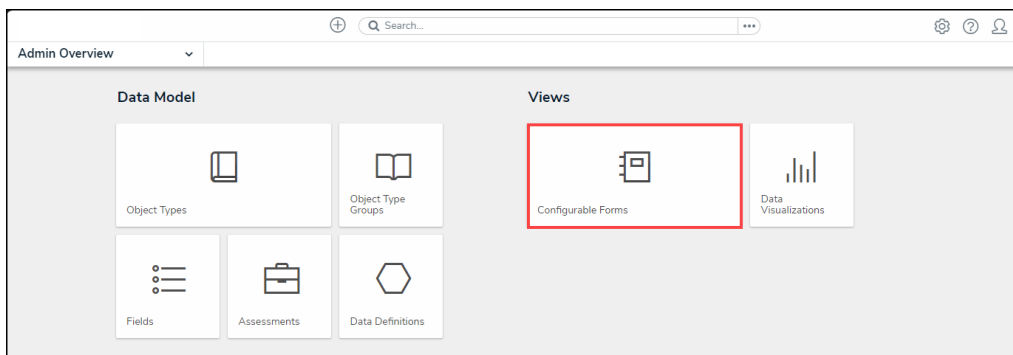1. From the *Home* screen, click the **Administration** icon.

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2. From the **Administration Settings** dropdown, click the **Admin Overview** link.
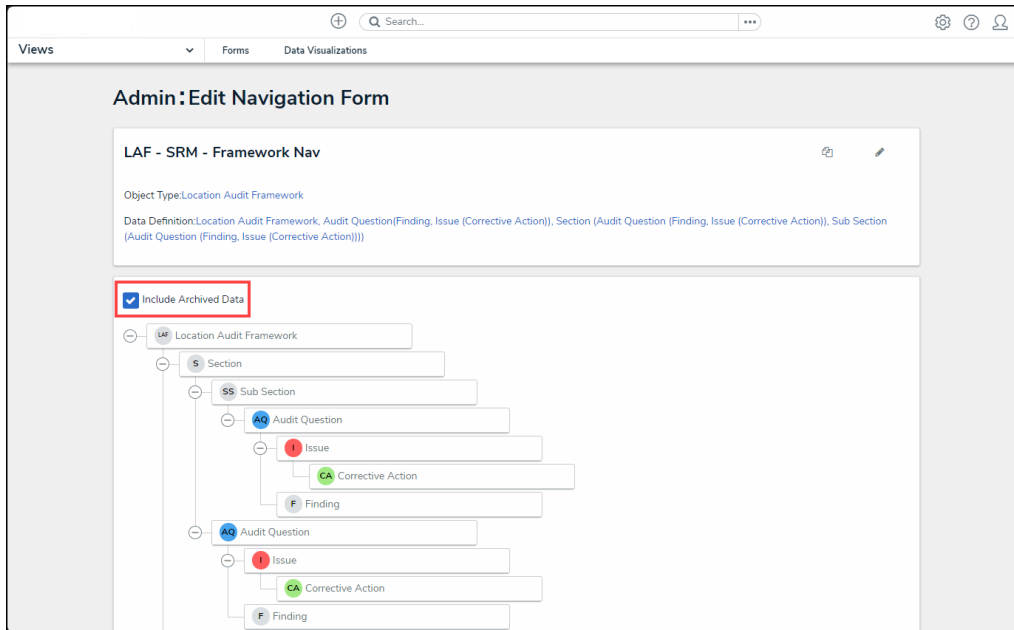
Admin Overview Link

3. From the ***Admin: Overview*** screen, click the **Configurable Forms** tile from under the **Views** section.

Configurable Forms Tile

Enabling or Disabling Archived Object Searches for a Navigation Form

1. From the ***Admin: Configurable Forms*** screen, create a new navigation form or open an existing one to view the ***Admin: Edit Navigation Form*** screen.

2. From the ***Admin: Navigation Form*** screen, click the **Include Archived Data** checkbox to include archived data in the tree view.

Include Archive Data Checkbox