

Include or Exclude Archived Data

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.




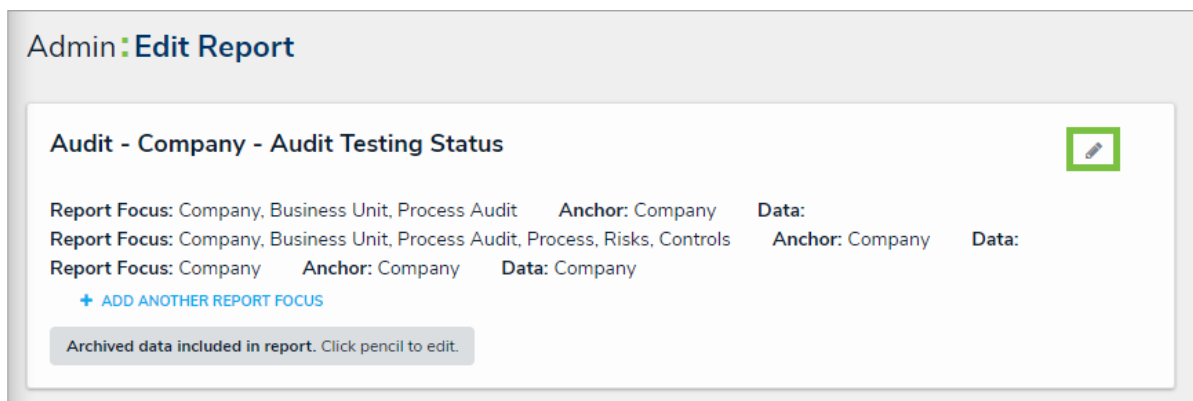
Reports, forms, and roles created before Version 3.0 are configured to **include** archived data by default. All reports, relationship/reference elements, and roles created after Version 3.0 **exclude** archived data by default.

Reports

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

To include or exclude archived objects from reports:

1. [Create](#) a new report or [open](#) an existing one to view the **Edit Report** page.
2. Click the  icon at the top-right of the first section on the **Edit Report** page.



The Edit Report page. In this case, the report is configured to include archived data.

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

Audit - Company - Audit Testing Status

Name

Audit - Company - Audit Testing Status

Description

Include archived data in report

Report Focus: Company Anchor: Company Data: Company

Report Focus: Company, Business Unit, Process Audit Anchor: Company Data: Process Audit

Report Focus: Company, Business Unit, Process Audit, Process, Risks, Controls Anchor: Company Data: Control

+ ADD ANOTHER REPORT FOCUS


The "Include archived data in report" checkbox.

4. Click the the  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.

To include or exclude archived objects from relationship and reference form elements:

1. [Create](#) a new standard form or [open](#) an existing one to view the **Edit Configurable Form** page.
2. If required, [add](#) a relationship or reference element to the canvas.
3. Hover your cursor over the element, then click the  icon to open the **Edit Component Display** screen.


Requirements



MARK READ-ONLY

Search


+ SECTION


A relationship element on a form canvas.


4. If required, click the  icon beside **Enable Search** in the **Format** section.


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

Format

 **Enable Search**

 **Include Archived Data in Search Results**

 **Enable Create**

 **Enable Advanced** This improves the search interface, as well as displaying Assessment History

The Format section of the Edit Component Display screen.



The **Include Archived Data in Search Results** option will not be visible if the **Enable Search** option is not enabled.

6. Click **Close** 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.

To enable or disable archived object searches for a role:

1. [Create](#) a new role or [open](#) an existing one to view the **Edit Role** page.

2. Click the  or  icons beside **Archived Search** in the **Advanced Options** section to enable or disable the end-user's ability to search for archived objects.

Advanced Options

 **Search Bar Enabled**  **Quick Add Enabled**  **Help Icon Enabled**  **Archived Search**

The Advanced Options section.

3. Click **Done** when finished.