



Archived Documents User Guide

Document Control Module



Introduction

The Archived tab is how you access documents that are no longer in active use within your organization.

The Archive function keeps your documentation clear, ensures that outdated or unused documents are stored separately from the documents you regularly use, and you never need to worry about information being lost.

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Archiving Documents

To archive an existing document, select the **Setup** tab of the **Document Control** module and then select a document within a **Subject** folder to view all the color bars associated with it. (Figure 1)

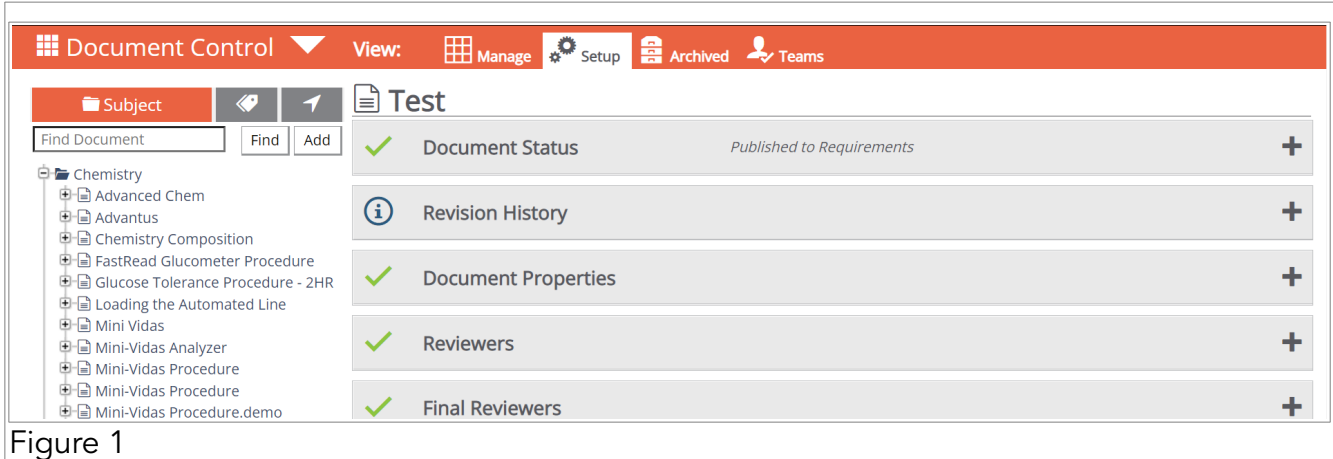


Figure 1

Select the **Document Status** color bar to expand it (Figure 2) and then select the **Archive** button. (Yellow box, Figure 2)

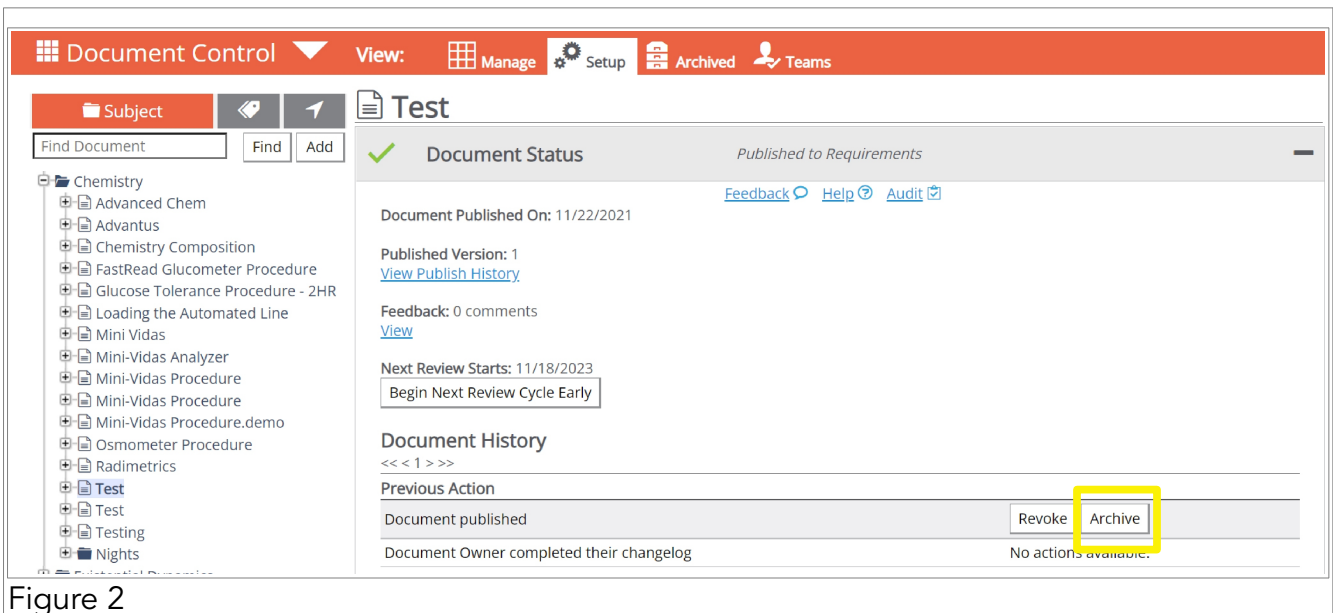


Figure 2

The document will be removed from the **Setup** tab and will only be accessible via the **Archived** tab.

Note: Only documents that have been published are eligible for Archiving. This button will not be visible for unpublished documents.

Accessing Documents in the Archived Perspective

To access a previously Archived document, select the **Archived Perspective** in the Document Control module. Select a document and then select the **Document Properties** color bar to expand it. (Figure 1)

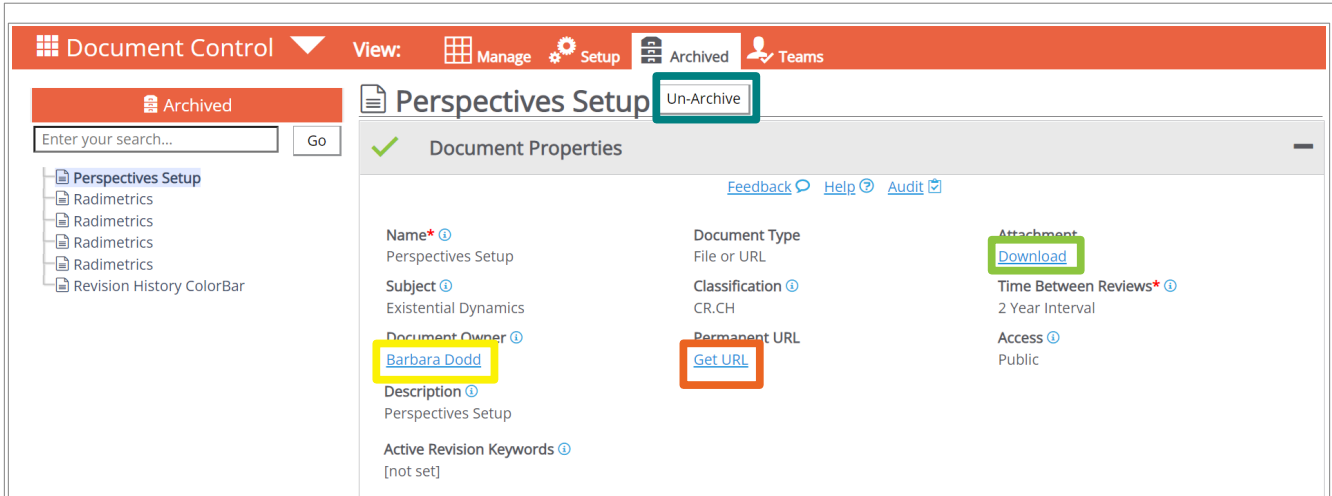


Figure 1

To restore a document to an active status, select the **Un-Archive** button. (Teal box, Figure 1) Additionally you can get the URL for that document by selecting the **Get URL** link (Orange box, Figure 1) or download a PDF of the document by selecting the **Download** link. (Green box, Figure 1)

You can update the document owner by selecting the **Document Owner** link. (Yellow box, Figure 1)

This will open the **Document Link** pop-up window. (Figure 2)

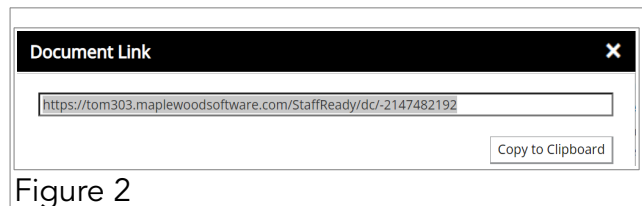


Figure 2

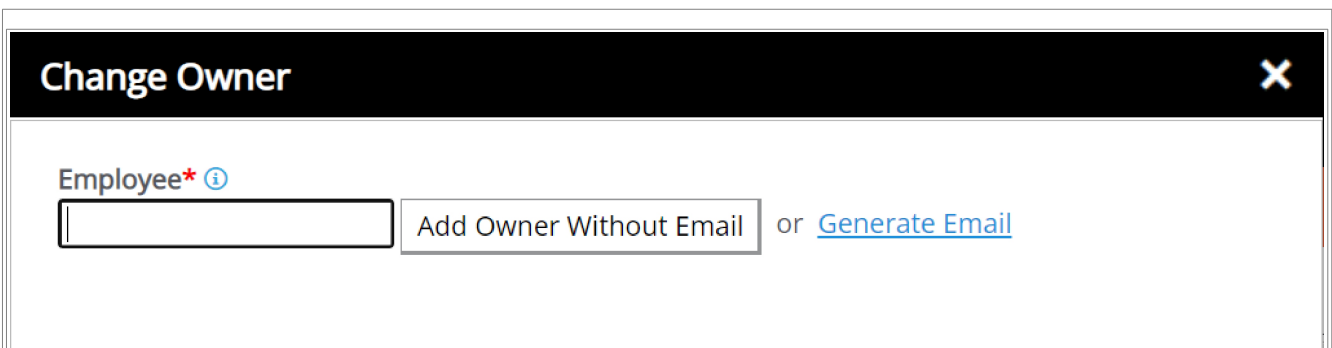


Figure 3

This will open the **Change Owner** pop-up window. (Figure 3) Enter in the employees name and select either the Add Owner Without Email button or the Generate Email link.

Resources

This concludes the User Guide for **Archived Documents**. We hope that you have a better understanding of this feature and how it functions within the entire framework of the Document Control module.

For more focused Guides on the functions and features discussed in this document, please check out the linked Guides on this page for supplemental reading.

For further assistance, please contact our Support Team directly.

Our service hours are Monday through Friday, 6am to 5pm PST.

Phone: 1-877-229-5230

[Online Support Form](#)

Related Topics

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