Archive Rules for Jobs

Settings – Archive Rules allows the user to archive off jobs which have been completed for a long time and you no longer want showing on the live operational system.

Archive Rules Allows you to set up archive rules for the jobs.

From here the User can Create Archive Rules with 5 different Rule Types as seen the in screen shot below. You also have to specify the number of days to elapse before the job is archived.

| Create Archive Rule | × |
|-----------------------------|--|
| Rule Name | |
| Rule Type | Job With Rejected Sales Quote 🗸 |
| | Job With Rejected Sales Quote Job With Open Sales Quote Open Job Completed Job Cancelled Job |
| Rule Name - The Name of th | e Rule |
| Rule Type - The Type of the | Rule |
| Days - The number of days a | fter which the Jobs should be archived for the rule |
| | |
| | ⊗ Cancel > Confirm |

Jobs can also be 'Unarchived' . On all the main Job lists you can filter on Archived Jobs.

| Open / Closed <open closed=""></open> | Reactive / Planned Reactive Only | Site <all sites=""> *</all> | Resource <all resources=""> *</all> | Assigned User <assigned users=""> *</assigned> | Team <all teams=""> *</all> | Job Priority | Job Type <all job="" types=""></all> | Sub Type All Sub Types> * | Clear Q More |
|---|--|--|--|--|---------------------------------|-------------------|---|---------------------------|--------------|
| Order Number Job N Order Number Job | umber Number | | | | | | | | |
| Status | Sub Status | Job Type Relevance | Performance | Alerts | Created Date | | | | |
| <all statuses=""></all> | _* | <relevance> 🗸</relevance> | <performance> v</performance> | <all alerts=""></all> | <created date=""> 🗸</created> | | | | |
| Location | Sub Location | Regions | Site Type | Job Category | | | | | |
| <locations> *</locations> | <sublocations> *</sublocations> | <all regions=""> *</all> | <all site="" types=""> 🗸 🗸</all> | <all categorie="" job="" td="" 🗸<=""><td></td><td></td><td></td><td></td><td></td></all> | | | | | |
| Planned Schedule | Schedule Category | Schedule Group | Compliance Type | Asset Class | Asset Sub Class | Assets | | | |
| <planned *<="" schedul="" td=""><td><schedule catego="" td="" 🐱<=""><td><schedule groups="" td="" 🗸<=""><td><compliance td="" type="" 🗸<=""><td><asset class=""> *</asset></td><td><asset class=""> *</asset></td><td><assets></assets></td><td></td><td></td><td></td></compliance></td></schedule></td></schedule></td></planned> | <schedule catego="" td="" 🐱<=""><td><schedule groups="" td="" 🗸<=""><td><compliance td="" type="" 🗸<=""><td><asset class=""> *</asset></td><td><asset class=""> *</asset></td><td><assets></assets></td><td></td><td></td><td></td></compliance></td></schedule></td></schedule> | <schedule groups="" td="" 🗸<=""><td><compliance td="" type="" 🗸<=""><td><asset class=""> *</asset></td><td><asset class=""> *</asset></td><td><assets></assets></td><td></td><td></td><td></td></compliance></td></schedule> | <compliance td="" type="" 🗸<=""><td><asset class=""> *</asset></td><td><asset class=""> *</asset></td><td><assets></assets></td><td></td><td></td><td></td></compliance> | <asset class=""> *</asset> | <asset class=""> *</asset> | <assets></assets> | | | |
| Quote Job | Contractor Quote Status | Sales Quote Status | Revenue Jobs | Archived Jobs | _ | | | | |
| <yes no=""> 🗸</yes> | <contractor quote="" td="" 🗸<=""><td><sales quote="" stati="" td="" 🗸<=""><td><revenue jobs=""> 🗸</revenue></td><td>Archived 🗸</td><td></td><td></td><td></td><td></td><td></td></sales></td></contractor> | <sales quote="" stati="" td="" 🗸<=""><td><revenue jobs=""> 🗸</revenue></td><td>Archived 🗸</td><td></td><td></td><td></td><td></td><td></td></sales> | <revenue jobs=""> 🗸</revenue> | Archived 🗸 | | | | | |

This will display all archived Jobs on the grid. Then by hovering over the job details, click Quick Actions and then **Unarchive**

| #:↓▼ | Details Y | Job Type | T | Contract | T | Site | T | Location | T | Status | Ŧ |
|------|----------------------------|--------------------------|---------|-----------------|---|-------------------------|---|----------|---|----------|---|
| 14 | Broken Sink | Description: Bi | roken ! | Sink | | Blarritz Normal site | | | | Complete | |
| 13 | Cleaning Job | Job Details Unarchive | | \triangleleft | | Biarritz Normal site | | | | Complete | |
| 8 | Window Broken on 1st floor | | | | | Blarritz Normal site | | | | Complete | |
| | ▶ ► 50 ▼ Items p | er page | | | | | | | | | |