# Archive Project

## Project Management Context

Archiving projects rather than leaving them active preserves data integrity and significantly reduces operational clutter across your portfolio. When finished initiatives are archived, real-time reporting does not get distorted, active resource tracking is not skewed, and cognitive fatigue is lessened for project teams navigating dashboards. Moving a closed project to archive status preserves its historical record, while establishing a clear operational boundary that signals team members to reallocate their time and focus strictly to live deliverables.

> **Note**
>
> - Users must be the actual Project Manager of the subject project or have the BrightWork PMO Manager security role in order to archive a project.
> - Content Templates can also be archived.
> - Activation and deactivation actions are removed from archived project settings.

## How to Archive a Project and its Child Records

1. In the project's Status tab, change the Project Status value to **Completed** or **Cancelled** and click **Save** at the top of the screen. Without one of these status values the Archive Project option will not appear for the project.
2. Select the **Charter** tab and click the Settings and Actions link.
3. Select the **Actions** tab.
4. In the Archive Project section click **Archive**.
5. Click **Confirm**.
6. A completion message displays - click **Confirm**.
7. The project and its child records are archived and put into read-only mode.

## How to Restore an Archived Project and its Child Records

1. Select the project's **Charter** tab and click the Settings and Actions link.
2. Select the **Actions** tab.
3. In the Restore Project section click **Restore**.
4. Click **Confirm**.
5. A completion message displays - click **Confirm**.
6. The project and its child records are no longer archived and are taken out of read-only mode.

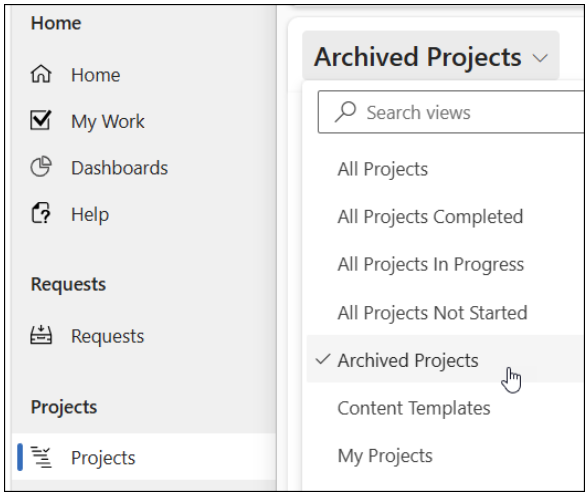
# Views and Dashboards

Projects and their associated child records such as issues, risks, etc., are removed from standard reports while remaining accessible in dedicated archive views and dashboards.

There are views and dashboards to distinguish Archived projects from non-archived projects.

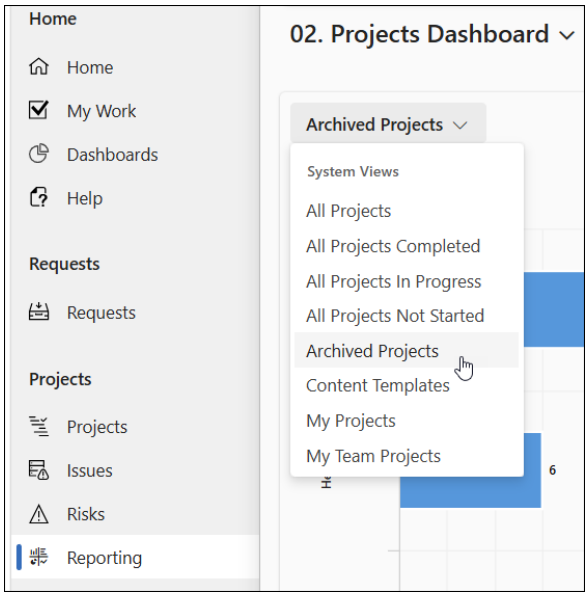
## Views

1. Click the **Projects** link in the main navigation.
2. Select **Archived Projects** from the view drop-down.




## Power Apps Dashboards

1. Click the **Reporting** link in the main navigation.
2. Select **Archived Projects** from the dashboard drop-down.



## Power BI Dashboards

Archived projects are not included in the following Power BI dashboards:

- My Work - Power BI
  - This can be toggled in the Filters panel
- Portfolio and Projects - Power BI
  - This can be toggled in the Filters panel
- Resource Utilization - Power BI