Archive a Facility or Sublocation

In the SafeTec system, while it seems like archiving a facility or sublocation would be as simple as just that, you should consider all the documents associated to that location. It is best if you archive documents at that location first before you archive the location.

The following set of instructions will walk you through the process of searching for documents at a location, archiving the documents at that location, and then archiving the location. This document will walk through this process using the Basket Feature. If you do not have this available to you on your admin website, please contact customerservice@safetec.net

Find All Documents at Your Location

1. On the Admin Main Menu, click **MSDS Search**.

   MSDS Search

2. Select the location you wish to archive. Change the *Active/Archived Status* to **Active or Archived**. This will ensure that all documents associated to that location are found.

   Active / Archived Status   Active or Archived ▼

3. Click the **Search** button.

   Search

Archive Documents at Your Location

4. From the Search Results page, to add all search results to the basket, simply click the **Add All to Basket** button.
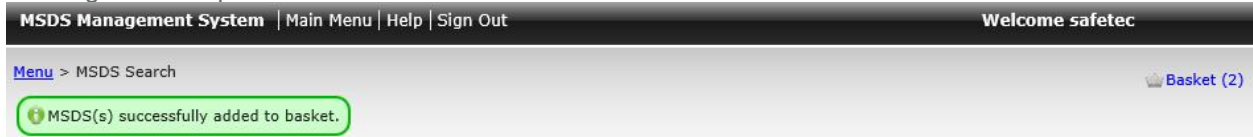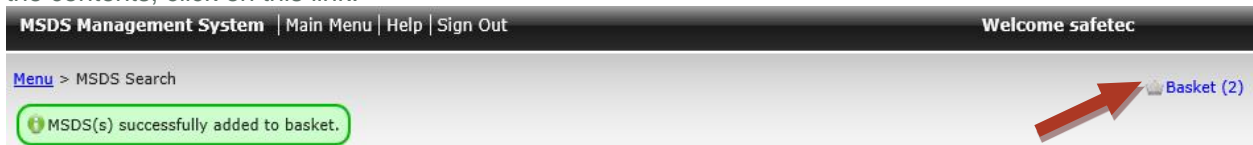
   Export to Excel   Add Checked to Basket   Add All to Basket

5. Verify that your (M)SDSs have been added successfully to the basket, as indicated by the following message at the top of the screen:

6. In the upper right corner, you can see the Basket and how many documents is in the Basket. To access the contents, click on this link.

7. Just above the basket's content grid, there is a horizontal list of actions that can be performed on the contents of the basket. Not all of these choices may be available to you. To archive the documents, you have two options:

    a. Click **Archive Location:** This will archive the document at just a location specified, but it will allow the document to remain active at any sublocations assigned.
    b. Click **Archive at Location Cascading:** This will archive the document at the location specified and any sublocations also assigned. SafeTec recommends this method.

Archive Location

Now that the documents associated to this location are marked that this location is no longer using them, it is time to archive the location. This will very a little bit depending on if you are working at the facility level or the sublocaiton level.

Archive a Facility
1. On the main menu, click the **Facility Management** button.

2. Search for the facility you wish to archive and click the blue link to open that record.

3. On the Detail tab, find the *Archive/Active Status* drop down menu and change it from **Active** to **Archive**.

4. Click the **Save** button at the top.

5. You will see a confirmation that your facility has been archived.

Archive a Sublocation

This process is very similar to archiving a facility, but with a few extra steps.

1. On the main menu, click the **Facility Management** button.

2. Search for the facility the sublocation you wish to archive belongs to and click the blue link to open that record.

3. On the Detail tab, click the **Sub Locations** tab.

4. Click on the blue sublocation link you wish to archive. If there are additional sublocations below it, they will automatically be archived as well.

5. In the pop out window that opens, change the *Active/Inactive Status* from **Active** to **Inactive**.

SubLocation1   ✖

Sub Location

SubLocation1

Inventory Status

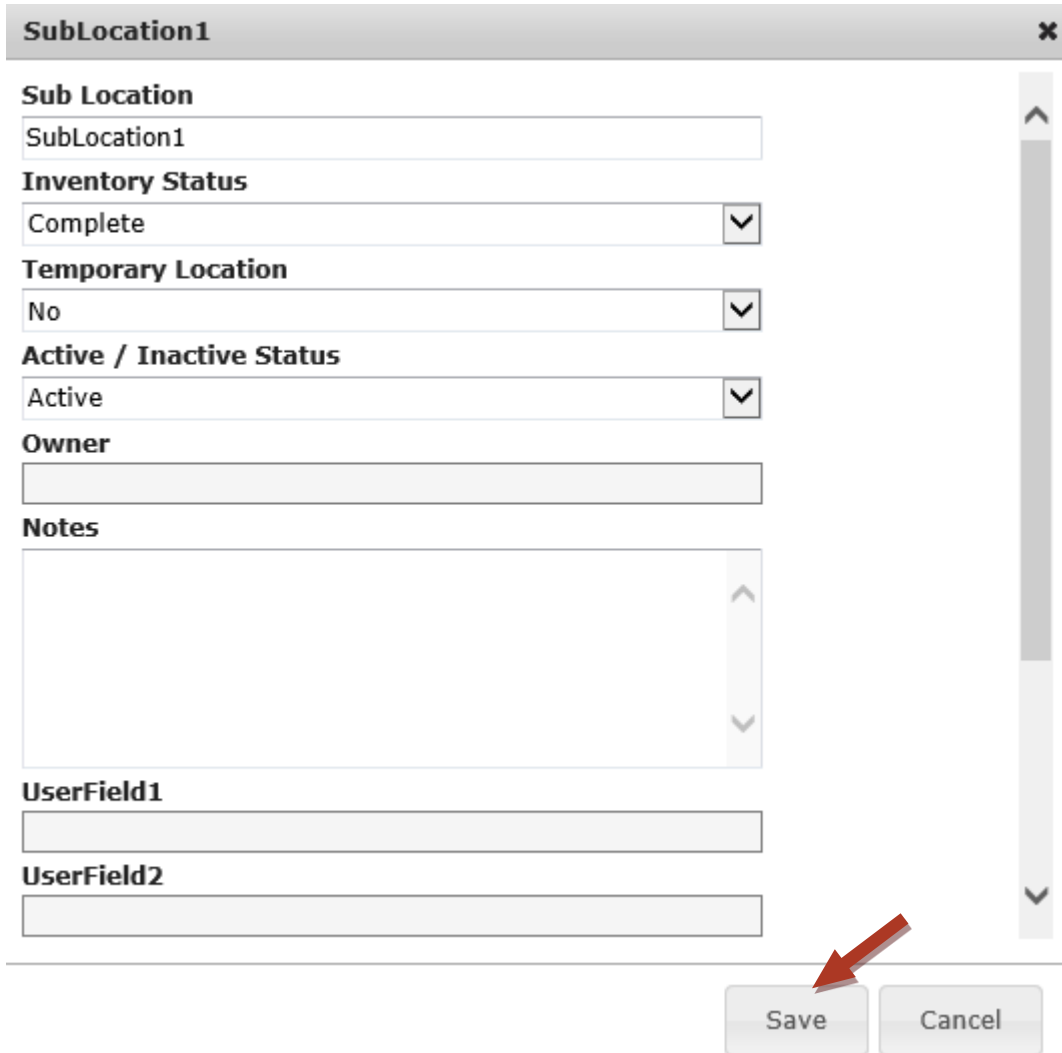Complete   ⌄

Temporary Location

No   ⌄
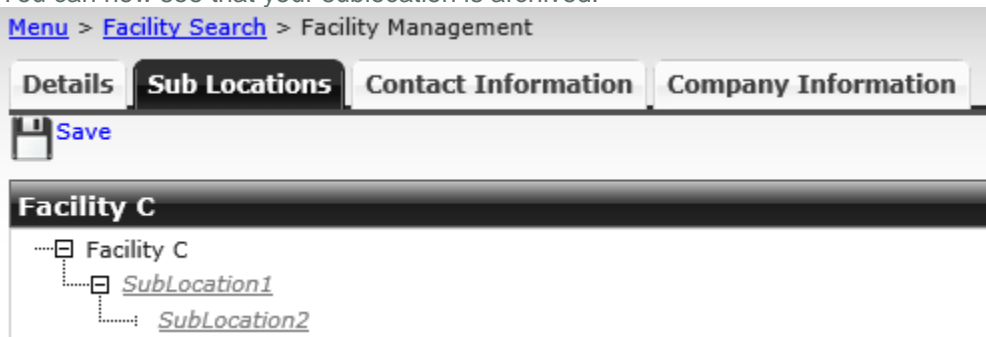
Active / Inactive Status

Active   ⌄

Owner

Notes

UserField1

UserField2

Save   Cancel

6. Click the **Save** button at the bottom.

7. You can now see that your sublocation is archived.