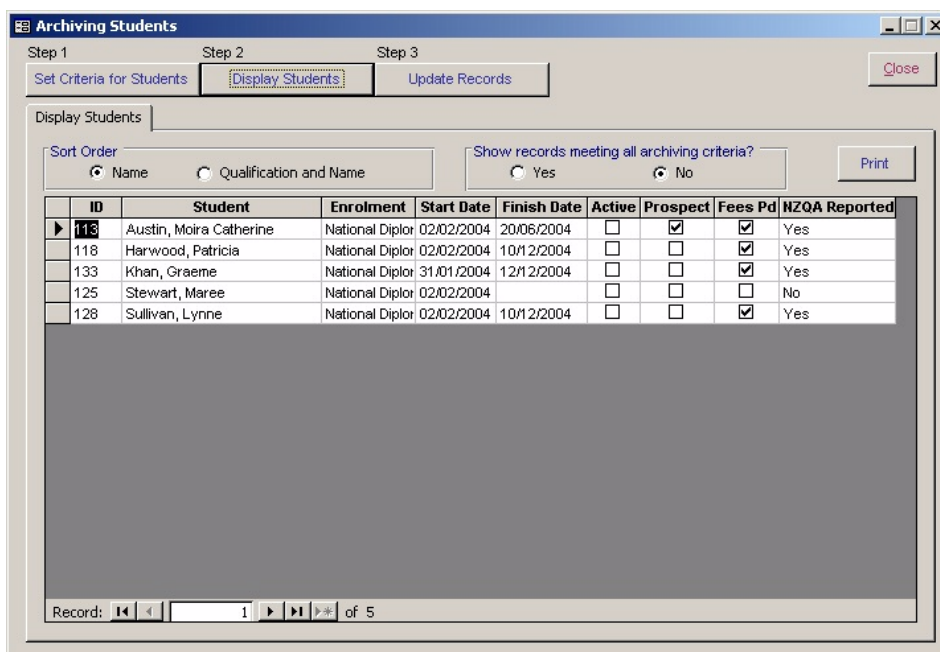


1. In the Administration Menu **click** on the **Archiving** menu button.



2. **Click** on the **Send to Archive** button.  
The Archiving Students form will appear.

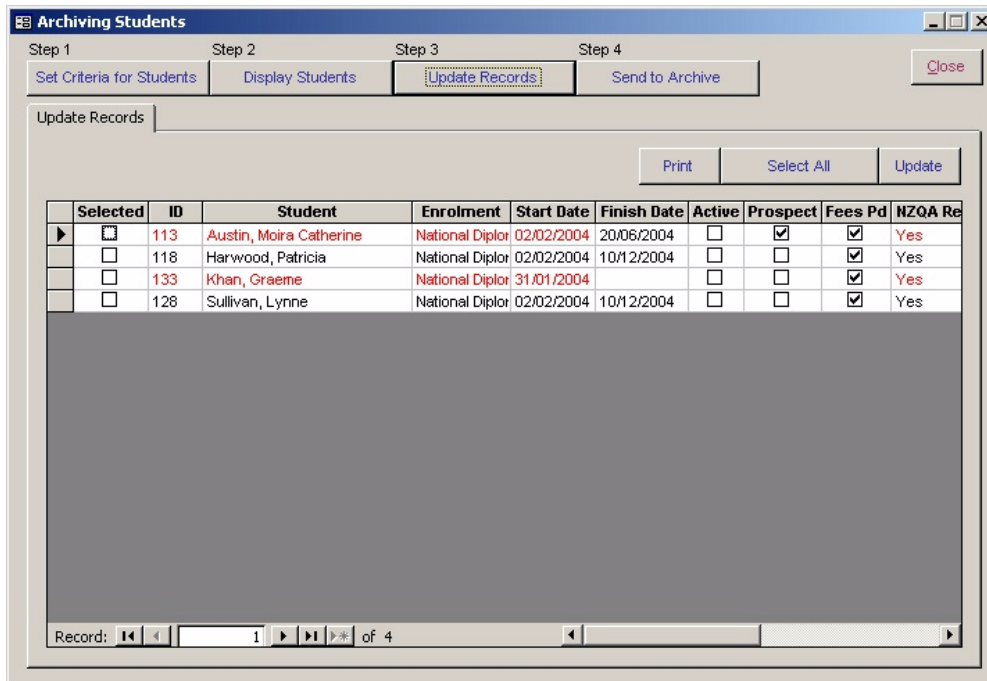


3. Under Step 1 **click** on the **Set Criteria for Students** button.  
A filter tab will be displayed allowing you to narrow down the selection of students to archive.
4. Under Step 2 **click** on the **Display Students** button.

Only students for whom the year of their latest course enrolment finish date is not less than two years prior today's date will be listed. Note that there is a field that shows whether all Unit Standard completions for a student have been reported to NZQA, in which case the field displays "YES". You can change the option at the top to show only students who meet **all** archiving criteria, if you wish.

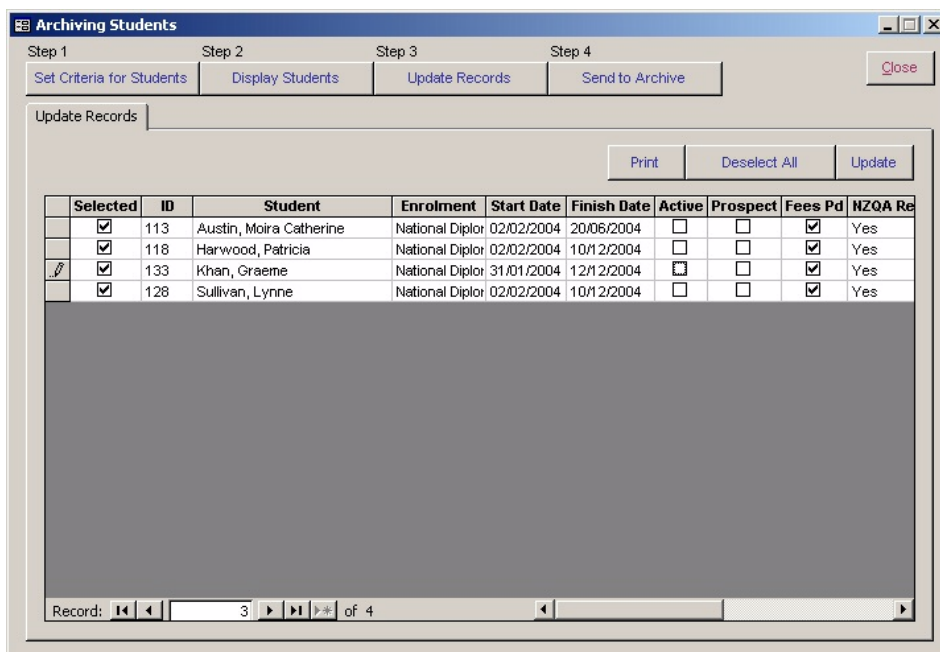
5. Under Step 3 **click** on the **Update Records** button.

Notice that here, any students who do not meet all the archiving criteria AND/OR who do not have a *Finish Date* (i.e. a qualification enrolment finish date) are displayed in red. These are the students who need updating.

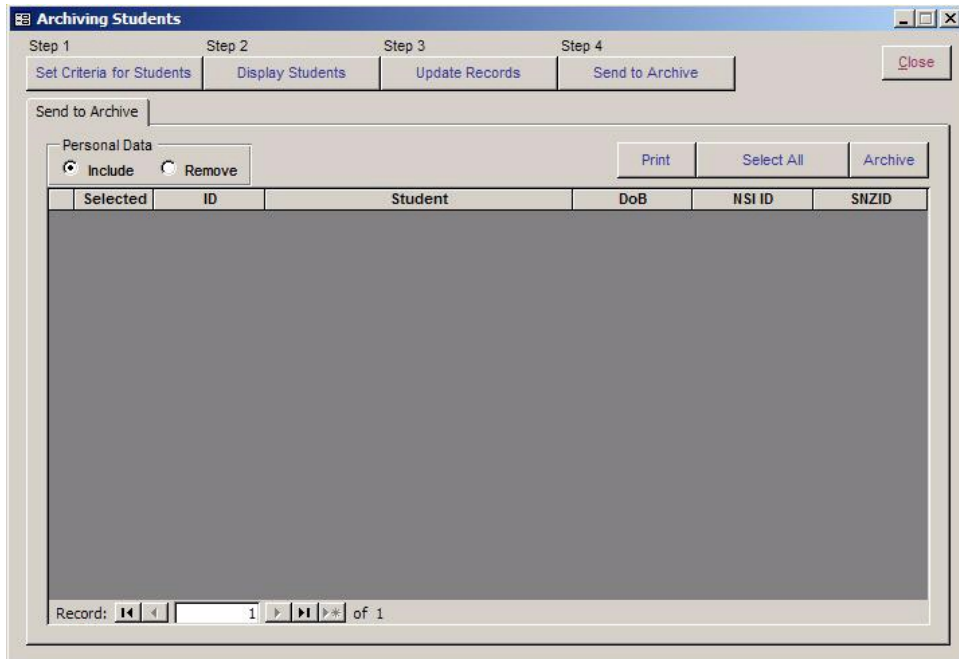


6. If there are any Finish Dates missing, enter them in.
7. Select the student to update.
8. Click on the **Update** button.

The Prospect and Active ticks are removed if present, and the Fees Paid tick is added. Now no students should be displayed in red.



9. Under Step 4 click on the **Send to Archive** button.



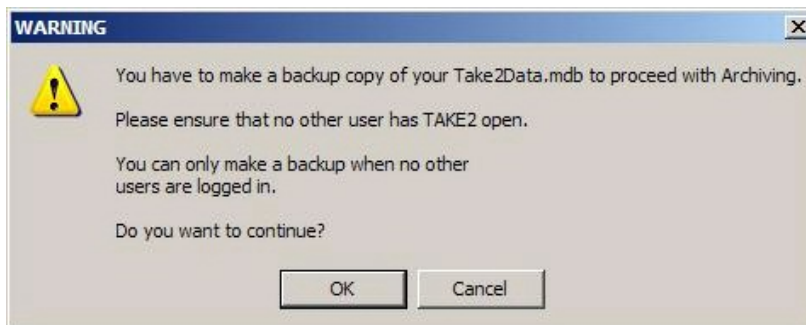
Select whether you wish to include personal data in the archive.

If you select the *Remove* option only the student's name, date of birth, and contact information (address, phone number, etc.) will be transferred to the archive file with the enrolment records. If you select the *Include* option additional demographic data such as ethnicity, citizenship, etc. will be transferred.

In deciding which option to use you may like to think about Principle 9 of the Privacy Act which says: *An agency that holds personal information shall not keep that information for longer than is required for the purposes for which the information may lawfully be used.*

**10. Ensure no one else is using Take2. Make sure that you do not have the Main Menu open.**

11. Select the students to archive.
12. Click on the **Archive** button.
13. You will get a final reminder of the archiving criteria.
14. Click on the **OK** button.
15. You will be prompted to make a backup.



16. Click on the **OK** button to proceed with the backup.

The back-up files, which are named "BU-" plus the date and time, are stored in the folder in which the Take2 data file is stored. There is one backup file containing Take2Data.mdb and another containing Take2Archive.mdb. The data in these backups are **pre** archiving.

The audit process itself does the following tasks:

- The selected students' records are removed from the live Take2 database.
- The selected students' enrolment records are removed from the live Take2 database.
- The selected students' records are added to the Take2 archive database.
- The selected students' enrolment records are added to the Take2 archive database.
- An audit report of the selected students is printed out.

Once a student has been archived they will no longer be visible to you in Take2 in the Main Module.

17. Your archive should be complete.