

MANUALLY ARCHIVING RECORDS & FILES

Why should I archive records?



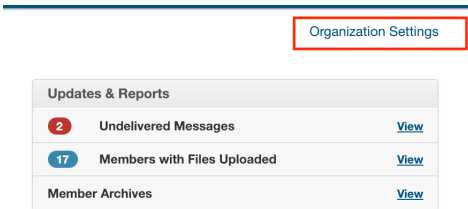
Whenever a change is made to the form, either by the organization or by ePACT, we recommend archiving your records so you have a copy of the information your participants submitted before the change.



Just follow the instructions below or visit our [Help Center](#) for assistance.

Step 1 Turn off Auto-Reminder

1. Go to "Organization Settings".
2. Click on Auto-Reminders and ensure "Enable Auto-Reminders" is NOT checked off.



Auto-Reminder Settings

☐ Enable Auto-Reminders

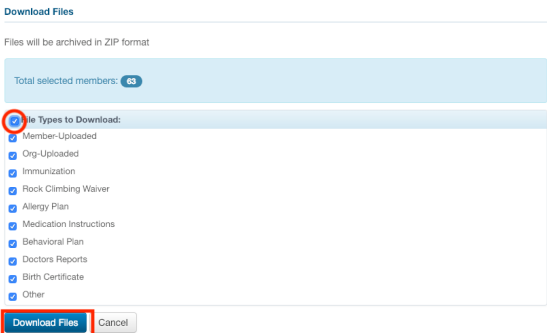
Step 2 Archiving Records

1. Click on Select All, followed by [Download>Records](#).
2. Click on [Download](#). A PDF of all records will be created.
3. Click on [Cancel](#) to return to your dashboard.
- \$. Store this PDF on a secure storage drive.



Step 3 Archiving Files (OPTIONAL)

1. Click on Select All, followed by [Download>Files](#).
2. Check off the box [Types to Download](#).
3. Click on [Download](#).
4. Click on [Cancel](#) to return to your dashboard.
5. Store this zipped folder on a secure drive.



You're done! Please be sure to store these archives in a secure location!



For information on **AUTO-ARCHIVING**, [click here](#).

For more information, please visit our [Help Center](#) or contact us at help@epactnetwork.com 1.855.773.7228.