



# Osprey Approach: Managing your Matter Archive Details List

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The latest version is always online at  
<https://support.ospreyapproach.com/?p=63771>

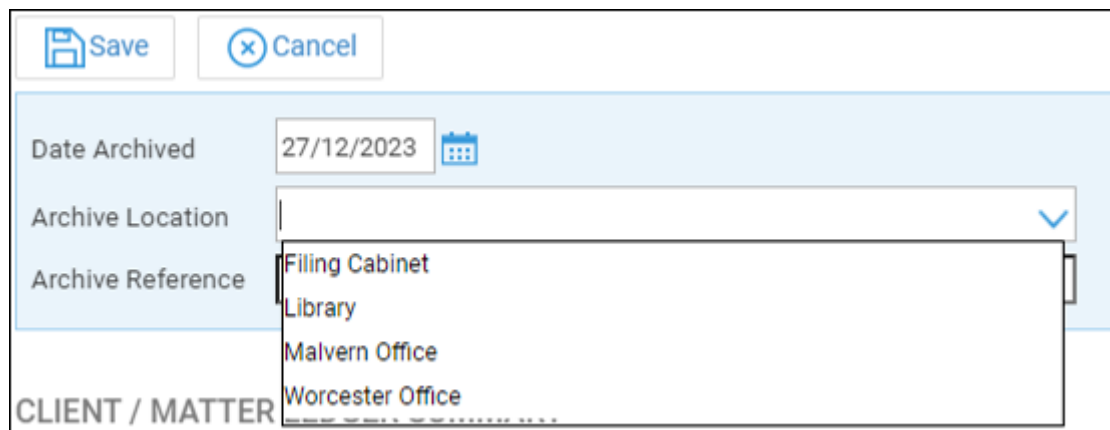
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# This guide will show you how to manage your archived matters as well as the matter archive details list

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When archiving a matter, users can select an existing Archive Location or Archive Reference, as well as create new ones.



The screenshot shows a form with the following elements:

- Buttons: **Save** (with a floppy disk icon) and **Cancel** (with a close icon).
- Fields:
  - Date Archived**: A text box containing "27/12/2023" and a calendar icon.
  - Archive Location**: A dropdown menu with a blue checkmark icon on the right.
  - Archive Reference**: A list box containing the following items:
    - Filing Cabinet
    - Library
    - Malvern Office
    - Worcester Office
- Label: **CLIENT / MATTER** followed by a horizontal line.

## Switching between Locations and References

Using the radio buttons at the top of the screen will allow you to switch between Locations and References.



The screenshot shows two radio buttons:

- Archive Location**: An unselected radio button.
- Archive Reference**: A selected radio button, indicated by a blue dot inside the circle.

## Adding new Locations and References

To create new Location or Reference, locate the field at the top of the page.




The screenshot shows a text input field with the placeholder text "Archive Location" and a **Save** button (with a floppy disk icon) to its right.


Enter the new Location or Reference, depending on which radio button is selected. Once done, click Save.

Supervisor

System Setup


Matter Archive Details

 Export



☒ Archive Location

☐ Archive Reference

 Save

DESCRIPTION
Filing Cabinet
Library
Malvern Office
Worcester Office

# Amending and removing Locations and References

If you need to remove any locations or references, you can via the Supervisor Area.


Go to Supervisor > System Setup > Matter Archive Details. A list of current locations may be visible.


If a location is edited, existing matters archived to this location are not automatically updated and retain their original location.

Supervisor

System Setup


Matter Archive Details

 Export





☒ Archive Location

☐ Archive Reference

 Save

DESCRIPTION
Filing Cabinet
Library
Malvern Office
Worcester Office

 Edit

 Delete

Right-click any entry to Edit or Delete. This may be necessary if there are any spelling mistakes, or invalid entries.