



Osprey Approach: Managing your Matter Archive Details List

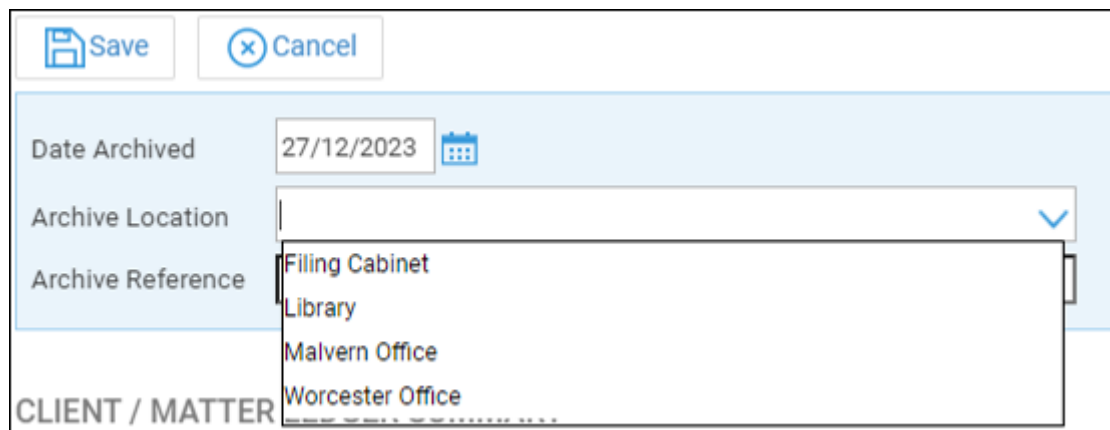
This help guide was last updated on
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The latest version is always online at
<https://support.ospreyapproach.com/?p=63771>



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

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 showing four options: "Filing Cabinet", "Library", "Malvern Office", and "Worcester Office".
- Label: **CLIENT / MATTER** is positioned to the left of the Archive Reference list box.

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 in the center.

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.