Osprey Approach: Managing your Matter Archive Details List
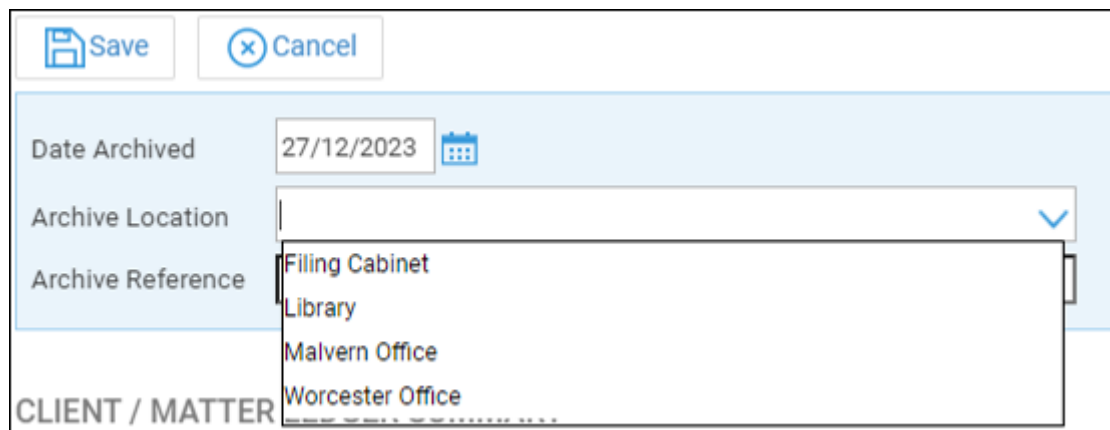
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The latest version is always online at
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This guide will show you how to manage your archived matters as well as the matter archive details list

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

Switching between Locations and References

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

Adding new Locations and References

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

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

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.

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