

Archiving a Matter in Time Matters

The way that many Case Management programs implement the archiving of records results in their users typically not using the archive features. There are three reasons users of these programs are reluctant to archive records:

- It is difficult to archive the records
- Once archived, it is difficult to access the records
- It is difficult to restore records from the Archives if they are needed again

Because all three of these steps are easy in Time Matters, users are not reluctant to archive records once completed. While there are a variety of ways you can archive records, this paper addresses archiving all the records that are related to a Matter that has been completed and needs to be closed.

- Open the Matter that you want to Archive. Press the **Timeline** tab and then make sure that all the Record Types have been selected. This means that you will be looking at the 10 date dependent record types. Press **Ctrl-T** to tag all the records. From the Main Menu, select **Process** and then **Archive**. You have now archived the date dependent records, leaving Contacts and the Matter record itself.
- Typically, you don't archive Contact records, as you are likely to use them again. Press the **Related** tab and highlight any of the Contacts that you want to archive. Press **Shift-T** to tag them. You will see a "plus" sign to the left of the Contact indicating it has been tagged. Using the **Process** button menu just above the related records, select **Archive** to archive the Contacts.
- The only thing left to do is to archive the Matter. Press the **Process** menu item on the Matter Form that you have open. Select **Archive**. This will archive the Matter.

A few odds and ends on Archiving:

- If you want to view the Archived records, access them at the **Archives** item on the **File** menu.
- You can also see archived records in the various sub-lists (the Notes, Docs, etc., tabs on the Matter Form). From the any sub-list, select the Properties button directly above it. Select **Lists** and make sure that you select the **Show Archived Records on the List**.
- To retrieve archived records, go to the Archived Matters List on the **File** menu. Locate the Matter you want to retrieve. Perform the three steps above, but select **Retrieve** instead of **Archive**.