

Archive Matters – How to Archive Matters from your system

Migration Manager has the ability to Archive closed Matters in your system. This is useful when you have many old Matters on file and wish to remove these from your day-to-day view. The Archive process does 2 things:

1. It sets the File Status for selected Matters to 'Closed - Archived'. This limits what can be done within the Matter and your Open window can be defaulted to not view these Archived Matters.
2. It moves the Matter's Folders (usually located in the **Migration Manager\Clients** folder) to an Archived folder (usually **Migration Manager\Z-Archive\Clients** folder).

By Archiving old Matters, the number of Matters folders in your Clients folder can be limited to the Matters that are in progress and relevant.

Archive Prerequisites

Prerequisite 1

For a Matter to be Archived, it must have a File Status of either '**File Closed**', or '**File Closed- To Be Archived**'.

The screenshot shows the 'Client Detail' form for 'ROGEKE.19.0015 - Rogers, Kenny'. The 'File Status' dropdown menu is open, displaying a list of statuses. A blue arrow points to the dropdown arrow, and a blue box highlights the 'File Closed' and 'File Closed - To Be Archived' options.

File Status
Weblead
Prospect
Initial Consultation
Confirmation of Instructions Sent
Service Agreement Received
Questionnaire Completed
Documents Requested
Documents Collected
Preparing for Lodgement
Ready for Lodgement
Lodged
Processing
Decision Received
File Inactive
File Closed
File Closed - To Be Archived

Prerequisite 2

All users must have **All** Client Detail windows closed to prevent any file locking. We would normally suggest asking all users to log out Migration Manager other than the user running the function.

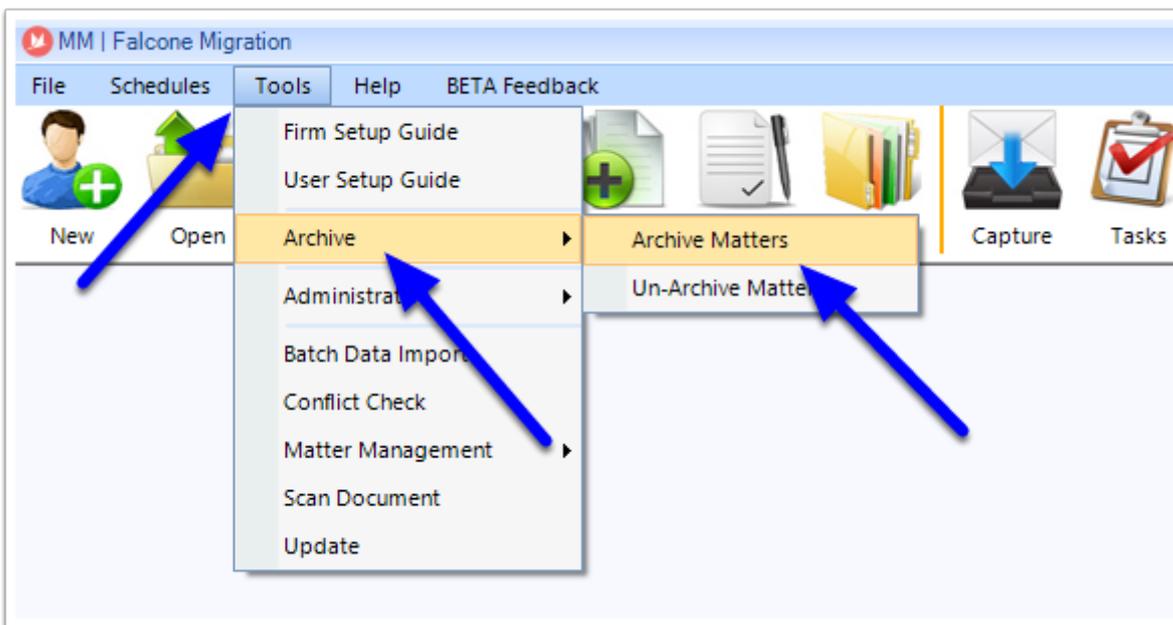
Prerequisite 3

The **Documents** tab of matter must be **reconciled** and not showing any items inn grey or red.

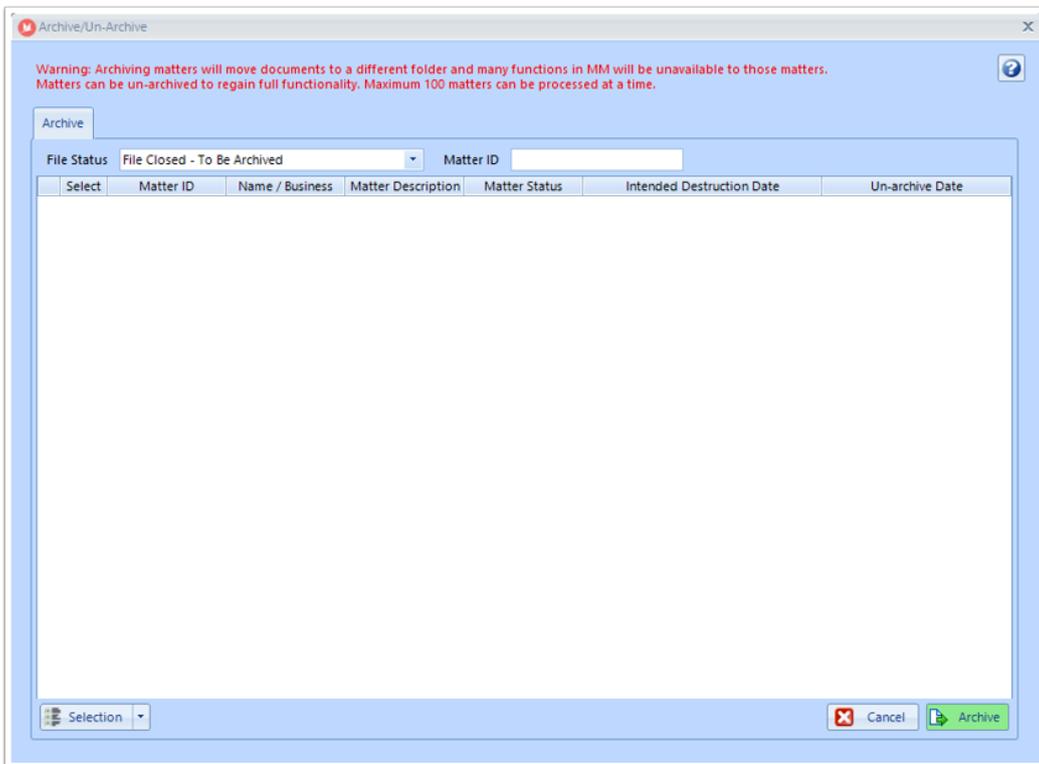
See: [How to Reconcile the Documents tab](#)

1. Accessing Archive Matters

From the Main Menu, select **Tools**, then **Archive**, then **Archive Matters**.

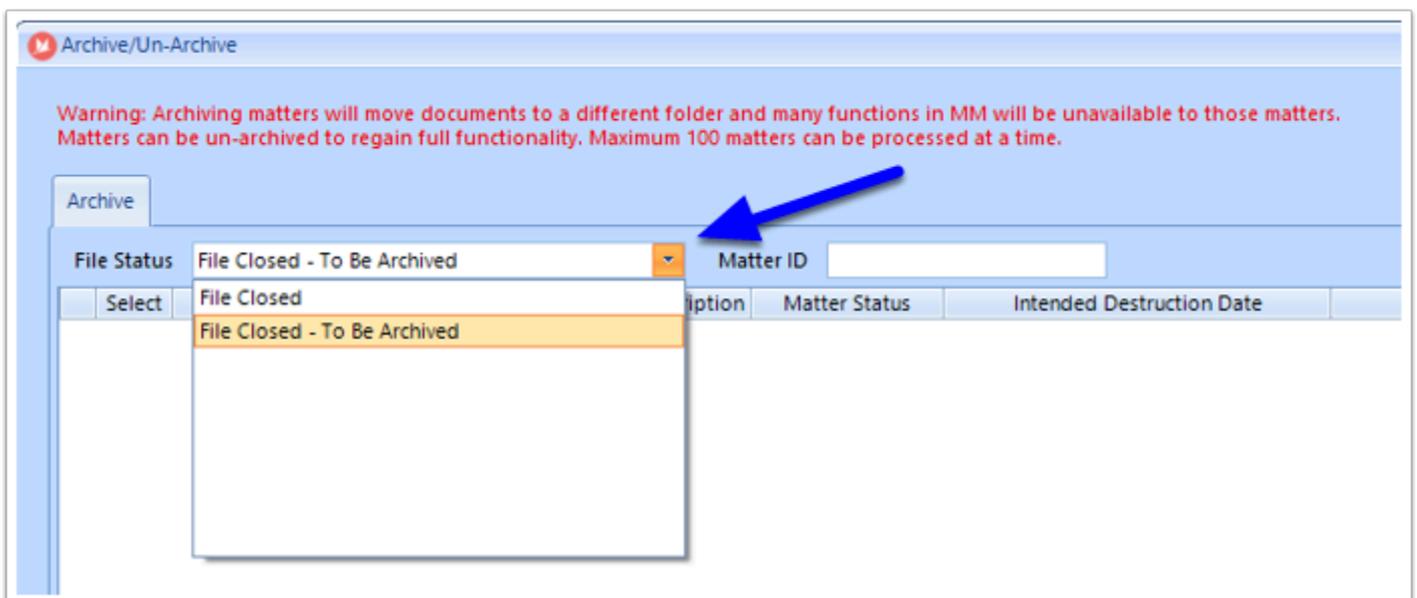


The Archive window will appear.

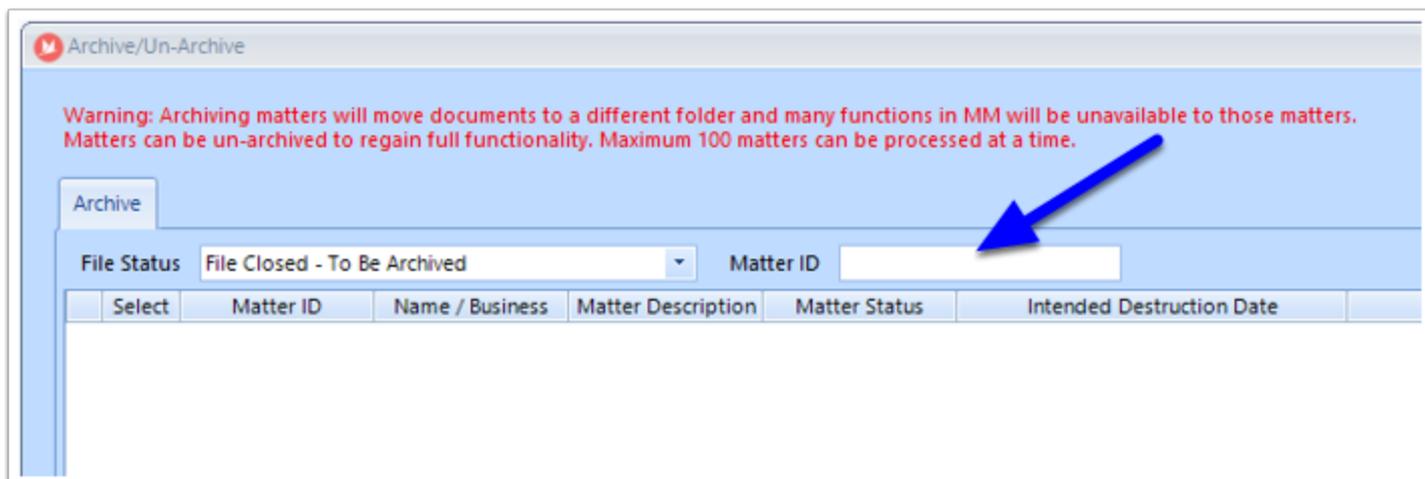


2. Set your filters to display the Matters you want to Archive

By default, the Archive window will display Matters with a File Status of '**File Closed To be Archived**'. If you wish to view Matters with a File Status of 'File Closed', click the **drop-down** arrow and select '**File Closed**'.



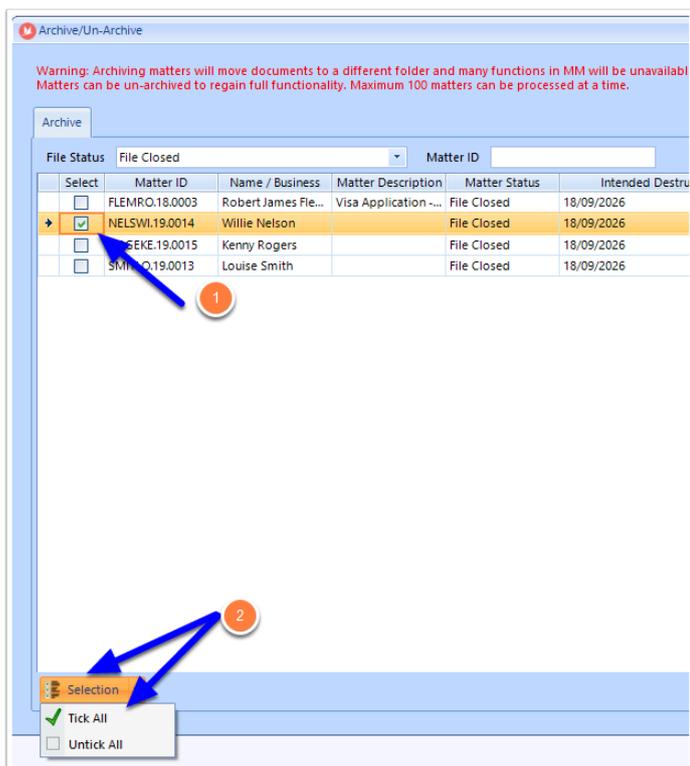
You can also search for a Matter ID by typing in the **Matter ID** search box (this will only display matching Matters where their File Status matches the selected File Status).



3. Selecting Matters to be Archived

Once you have set your File Status filter, a list of matching Matters will be displayed.

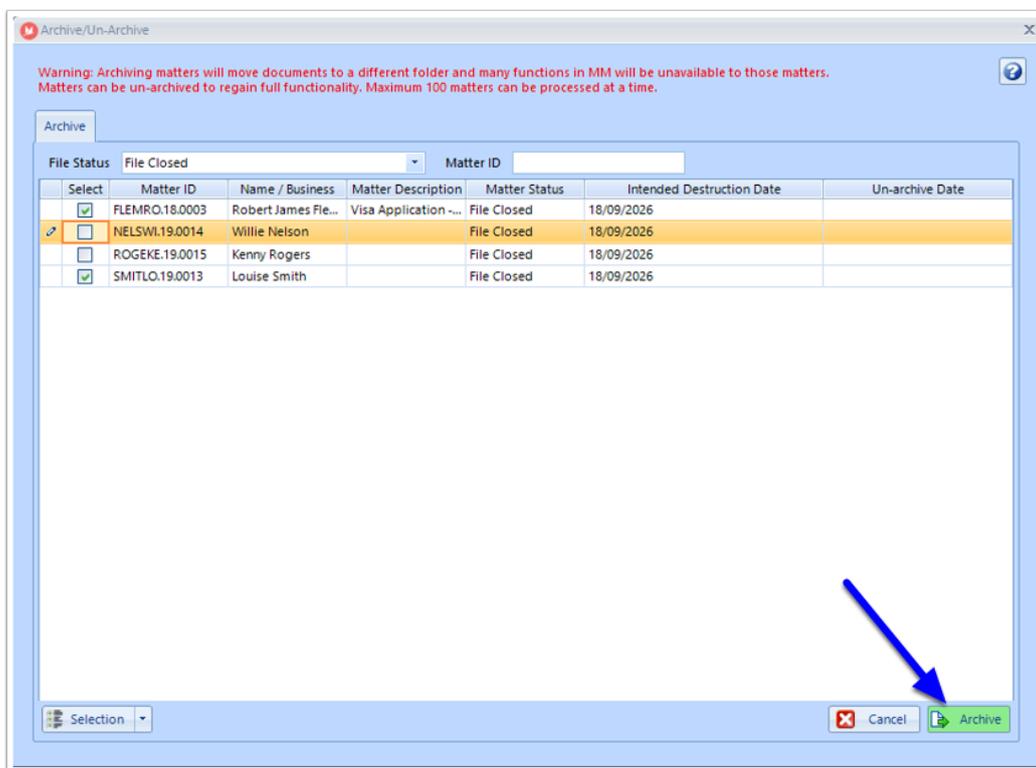
1. Tick the box for each Matter you would like to Archive.
2. If you would like to select all Matters in the Search window, click the Selection dropdown, then 'Tick All'.



i Note: Archiving Matters can be a lengthy process to run since the function needs to physically move all the chosen Matter documents to the new location. Because of this, Migration Manager will only process a maximum of **100** Matters at a time. If you have more than 100 Matters to process, you simply need to repeat the process for the next 100 and so on.

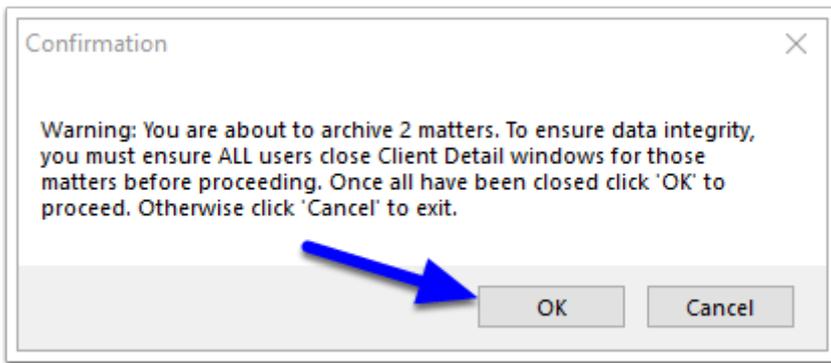
4. Archive

Once you have chosen the Matters to Archive, click the **Archive** button.



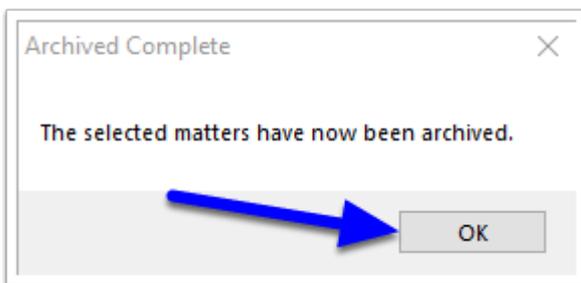
5. Confirm Archiving

A message will appear informing of the archive. When you are sure no users have Client Details open, click **OK**.



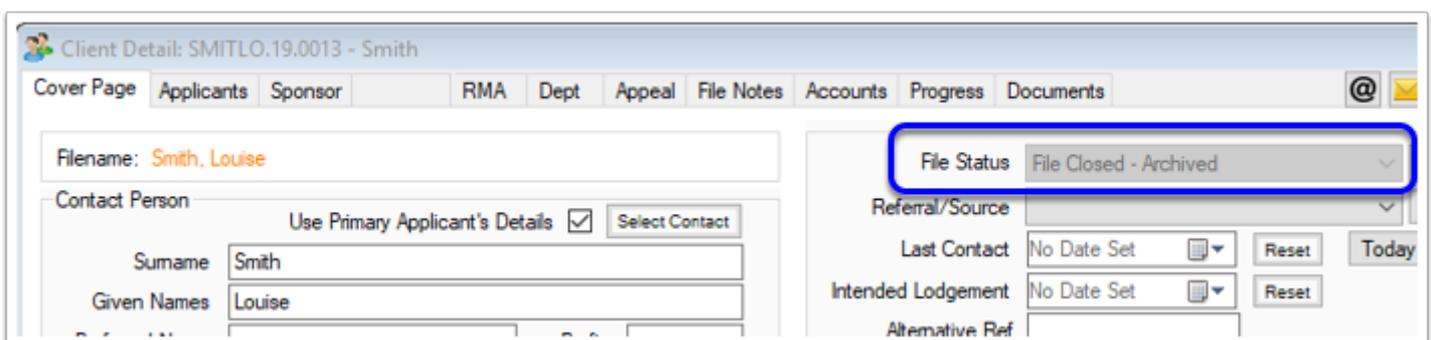
6. Archive Complete

Once the Archiving process has completed, a confirmation will appear. Click **OK**.

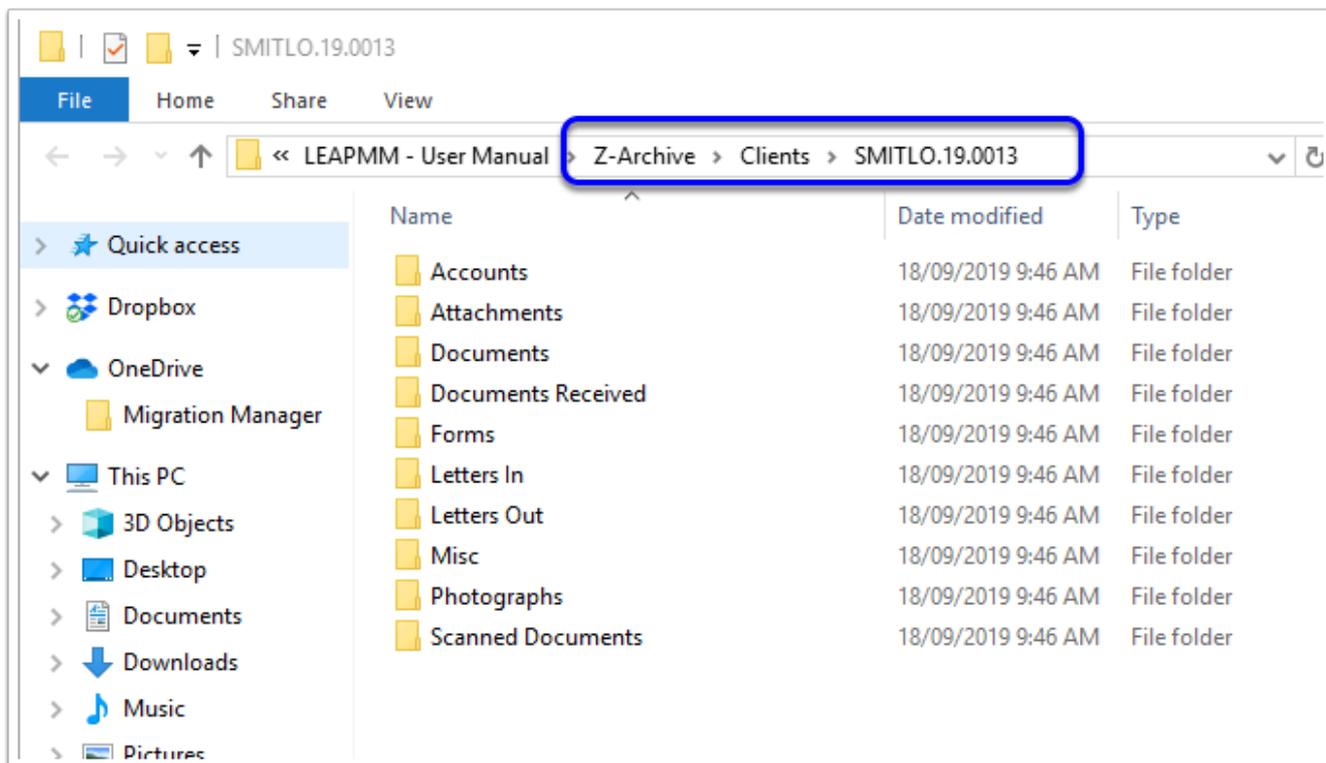


Outcome

- The Matter/s have now been set to a File Status of '**File Closed - Archived**'. This status cannot be changed via the Matter. It will need to be un-archived to access the field again.



- The Matter Folders have been moved to the **VZ-Archive\Clients** folder of your Migration Manager folder



Common Issue with Archiving

Documents tab not reconciled:

If any documents in the **Documents** tab have not been reconciled then this matter cannot be archived.

[How to Reconcile the Documents tab | Letters and Documents | Migration Manager User Manual \(mmcpd.com\)](#)

Cloud File Service unable to download files in time:

If you Client documents are in the cloud and not stored locally on your HD, then they may not download in time for Migration Manager to move them.

It is recommended that the Client folders being archived are synced locally to the computer Archiving.

Files in use:

If another User has viewed any of the document for this client recently then Windows may think that these documents are still in use.

It is recommended to restart your computer before Archiving to make sure Windows does not think these documents and folders are in user and to Archive files when no other users are working on these matters in Migration Manager.

User permissions:

If the Windows User of this computer is not an Administrator account, then they may have permission errors when trying to Archive matters.

Only Windows Administrator accounts should Archive matters in Migration Manager.