

Archiving Matters

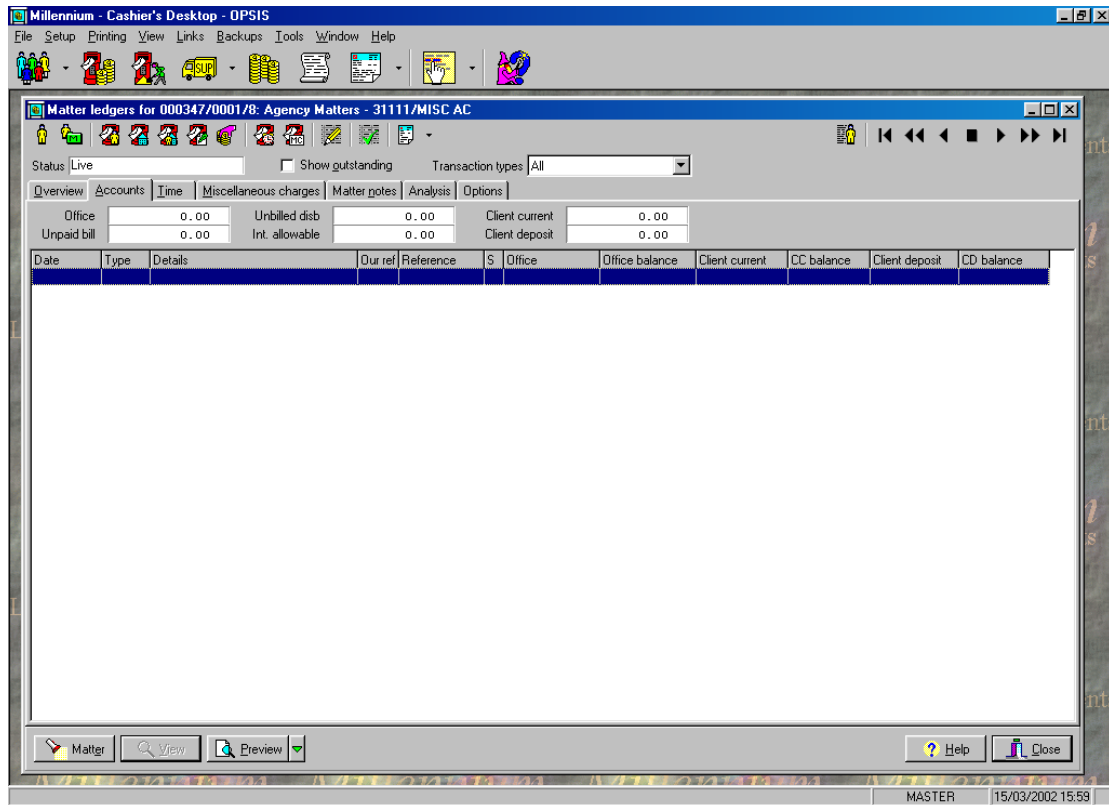
Archiving of matters

The archiving of matters under Millennium is a 3 stage process

Stage 1

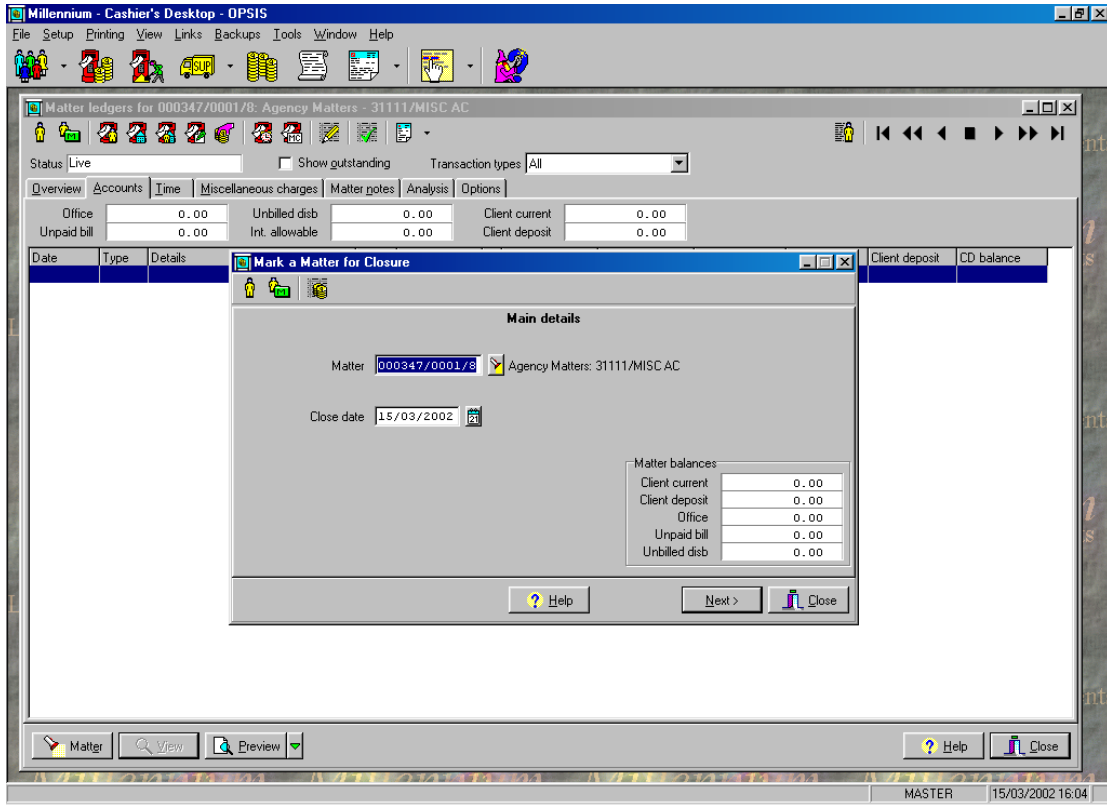
The matter needs to be flagged as closed. This is done by either:-

1. Going to the ledger card and clicking in the green tick

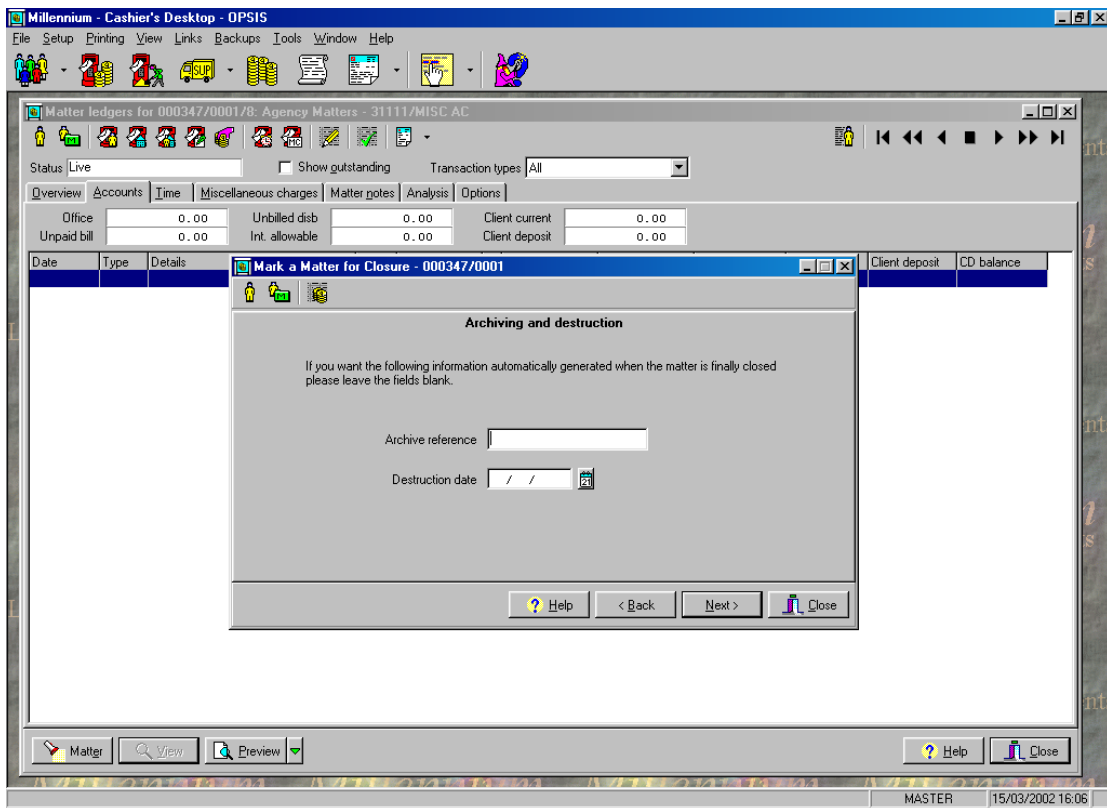


Which will bring up the mark matter for closure screen.

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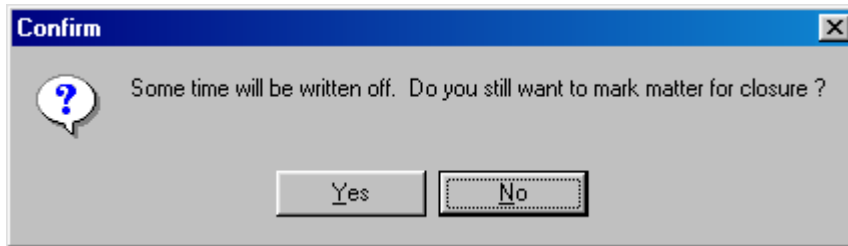
The close date will default to today's date but can be changed to any date required



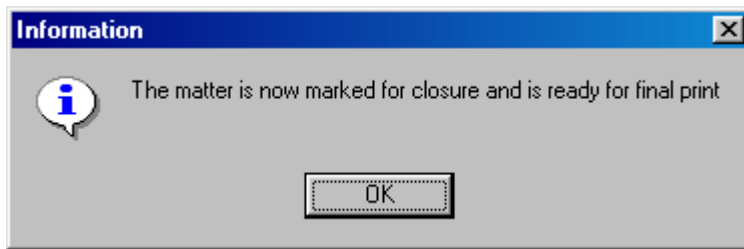
Specify the archive number and destruction date if required and then click on next.

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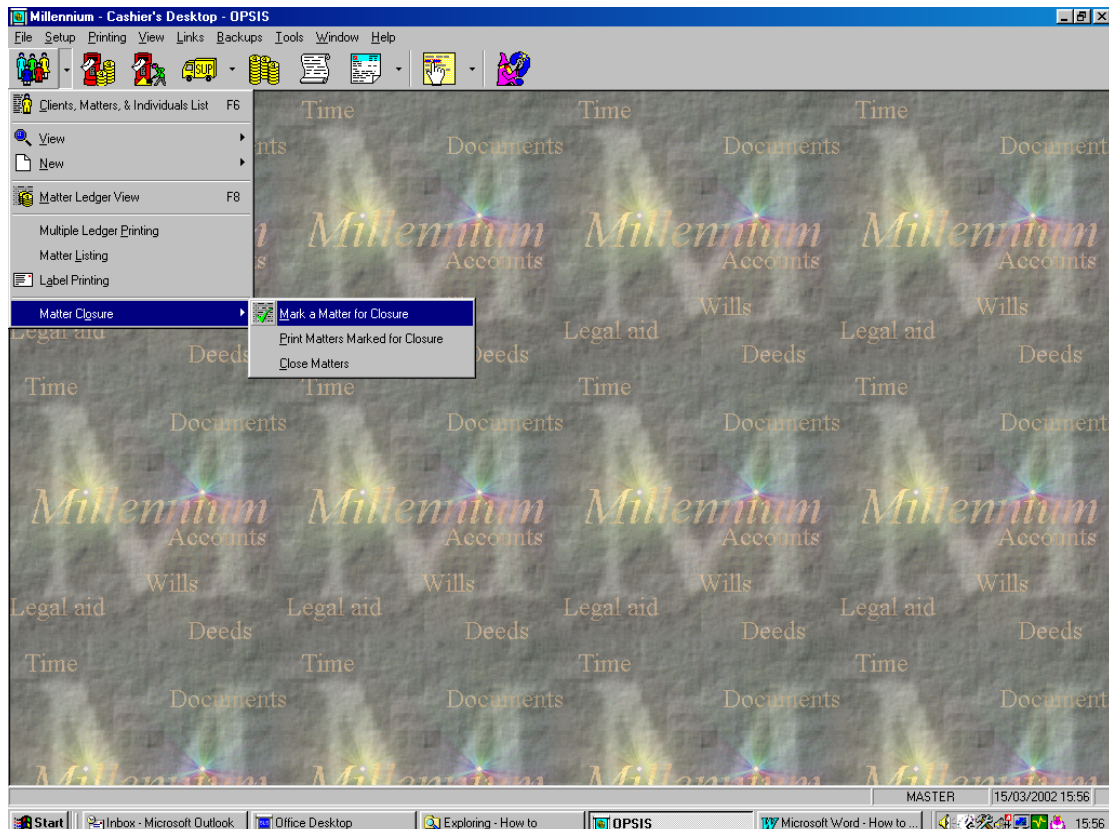
If there is any unbilled time the following message will appear



If you wish to continue click on yes and system will give the following message



2. Or by clicking on the down arrow to the right of the group of people icon – this will give a further menu , select Mark a matter for end of work then clicking on mark matter for closure and then next

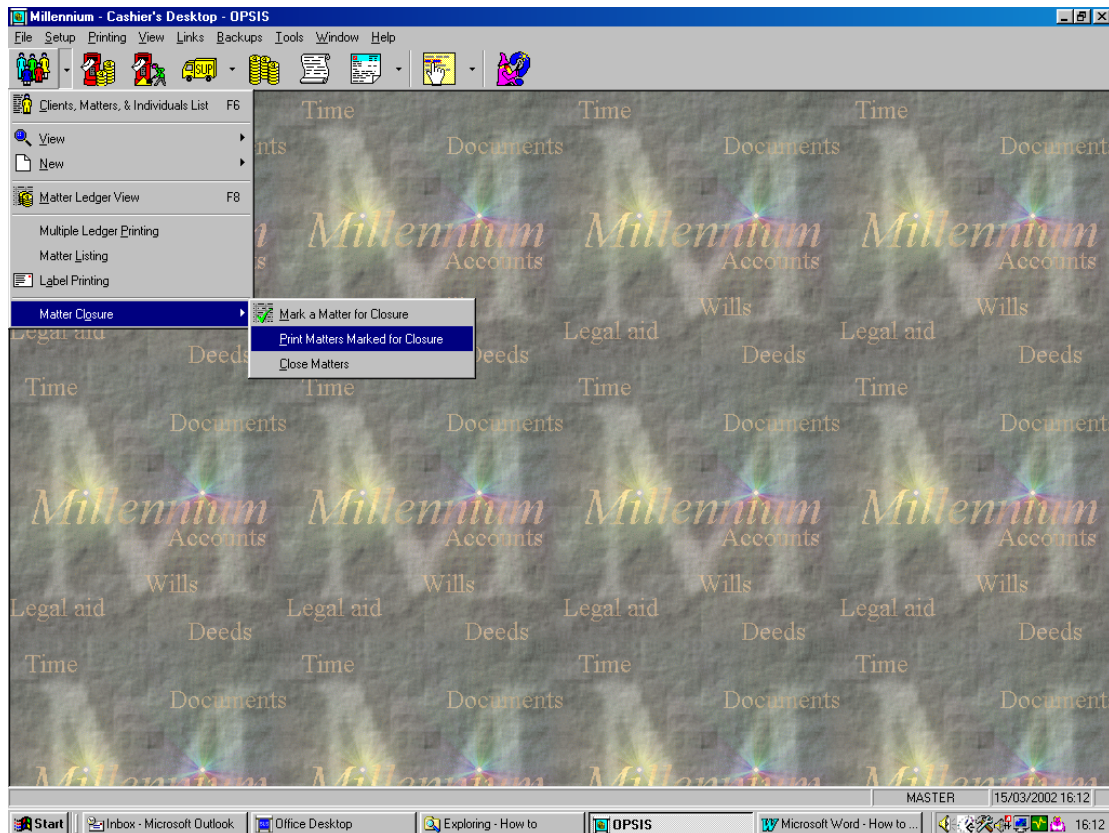


Then continue as above.

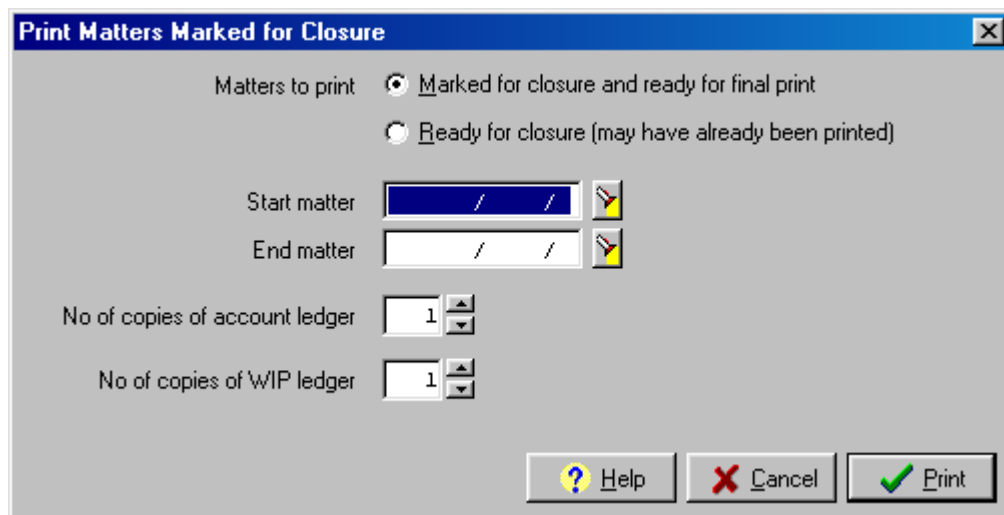
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Stage 2

Printing the matters marked for closure.



Clicking on the down arrow to the right of the group of people icon – this will give a further menu



Select Print matters marked for closure then clicking on mark matter for closure. Leaving the Start and End Matter blank will cause all the ledger cards marked for closure to be printed. Specify the number of copies of the ledger card to be printed.

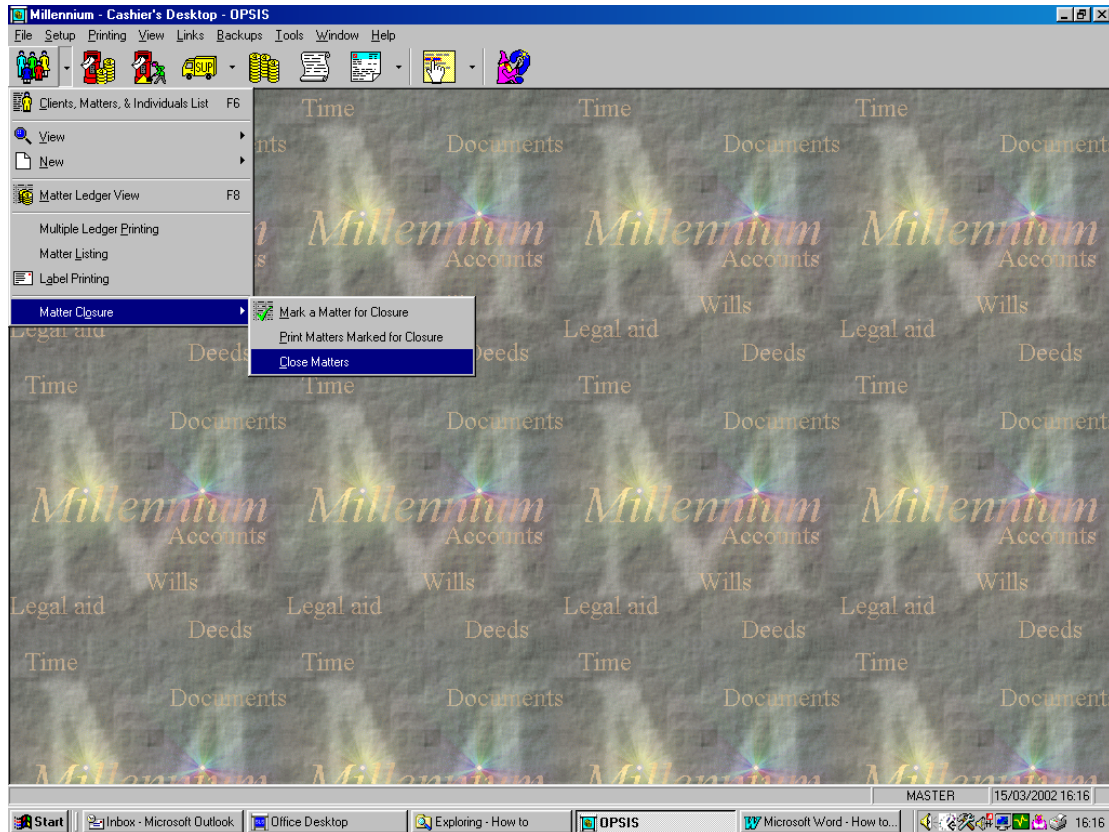
If the previous printout has been lost the select 'Ready for closure (may already have been printed)'

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Stage 3

Archiving the matters

Clicking on the down arrow to the right of the group of people icon – this will give a further menu , select Close Matters



then complete the following screen as required

A screenshot of the 'Close Matters' dialog box. It has a title bar with a close button. The dialog contains the following fields:

- 'Start matter' and 'End matter' fields, each with a date format (/ /) and a calendar icon.
- An 'Archiving information' section with:
 - 'Location' field containing '2000'.
 - 'First available no.' field with a dropdown menu showing '58'.
 - 'Last available no.' field with a dropdown menu showing '999999999'.
 - 'Destruction date' field containing '13/03/2009' and a calendar icon.
- At the bottom, there are three buttons: 'Help' (with a question mark icon), 'Cancel' (with a red X icon), and 'Start' (with a green checkmark icon).

and click on Start.

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NOTE

**All matters will be given the same destruction date unless the date has been specified in stage 1
The accounting transactions can be retained if the switch in the Practice options – Clients and
Matters –**

**Keep account transactions when archiving option is ticked. Time transactions are always
deleted on archiving.**

**All office transactions must be allocated. If there are any future disbursements outstanding on
the ledger these must be cleared before attempting to close the matter.**