

LawMaster Archiving Documents

Introduction

The system provides the facility to archive documents for matters, subject files, or personnel based on the File Close Date or Document Archive Date.

Pre-requisites

Prior to running the archive process each Document Management Server defined to the system must be updated with an archive location in the Archive Directory field. This is where the archived files will be moved after the two-step archive process is completed. The **DS** Parameter is accessed from Menubar → Parameters → Set Parameters → WP, Mail, Help & Printing → Document Management Servers. Select each **DS** Parameter and update the Archive Directory field noting that it must be a local drive of the Server running the LawMaster DMS application.

If archiving by calendar year you may wish to include the archive year in the Archive Directory parameter.

If you are a hosted client wishing to move files to external storage you will also need to install FileZilla (client version) onto your local machine.

Code	MAIN
Description	Main Office
Use LawMaster DMS?	<input checked="" type="checkbox"/>
Search Timeout	60
Full Text Indexing	<input checked="" type="checkbox"/>
DMS Server Address	
Template Directory	D:\LawMasterDMS\prec
Document Directory	D:\LawMasterDMS\docs
Archive Directory	D:\LawMasterDMS\archive\2018
Visible ?	<input checked="" type="checkbox"/>

OK Cancel

Stage 1 – Update Document Records for Archiving

The first stage of the archiving process involves preparing the nominated folios by updating each folio storage record with the intended archive location and creating a record on the Folio Archive table.

Folios are flagged for archiving by running the Archive Documents module from Main Menu → Records Management → General Reporting and Processing.

Run - Archive Documents

Title: Archive Documents

This module provides the facility to prepare documents for archiving based of file closure date OR document archive date for a selected type of file.

The Folio storage record is updated with the directory that the document is to be archived to.

File Type: Matter

Date - From: 01/01/2018

Date - To: 31/12/2018

Archive Basis: File Close Date

Action: List Only

OK Cancel

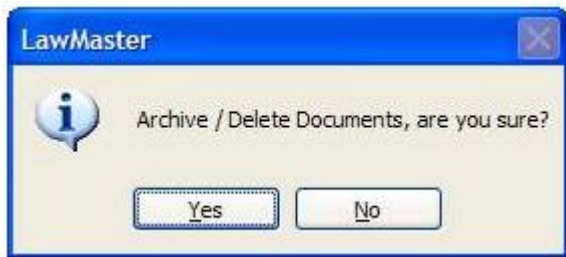
The Archive Documents module provides the facility to archive folios based on the following input fields:

- **File Type:** Module will run on the specified File Types of Matter, Subject Files or Personnel
- **Date - From:** Date range for Archive Basis
- **Date - To:**
- **Archive Basis:** File Close Date eg Matter Closed Date or Document Archive Date based on Folio Retention Date.
- **Action** selection types:
 - List Only (displays all folios that meet the criteria to be archived)
 - List and Archive (as per List option, updates the archive directory value on the folio record and creates a record on the Folio Archive table)

The archiving of documents should be performed on a regular basis. The system control report reports the existence of folio archive records that are awaiting completion of Stage 2 under the Messages tab. It is recommended that you run the Archive Documents module in List Mode until you have less than 50,000 folios returned. Then run it in List and Archive mode. Stage 2 should be run before selecting more records in Stage 1.

Stage 2 – Move Documents to Archive Location

The second stage of the process involves moving the nominated documents, recorded in the Folio Archive table in Stage 1, to the intended archive location by running the Delete / Archive Physical Documents Module. The module is accessed from Main Menu → Records Management → General Reporting and Processing.



On commencement of processing, a document lock will be set to prevent multiple instances of this module running simultaneously. The document lock may be removed via Main Menu → Records Management → General Reporting and Processing → Remove Document Administration Lock. Documents for which no associated server parameter exists are bypassed.

Once the folios have been moved to the archive location the folio record will display the **Date of Writing** field in grey and the **Server Path** field will point to the location nominated in the **Archive Directory** field of the DS Parameter. The user can still access the folio from LawMaster at this stage.

Folio No	Storage ID	Date of Writing	Precis	Server Path	Archive Directory
41695	51415	16/10/2017	Letter to client enclosing client agreement for signature and return	G:\LawMasterDMS\archive\2018\	M00022487\F5000051415.docx
41693	51414	14/08/2017	Letter to client confirming details of Trust Account	G:\LawMasterDMS\archive\2018\	M00022487\F5000051414.docx

Move Archived Documents to External Storage

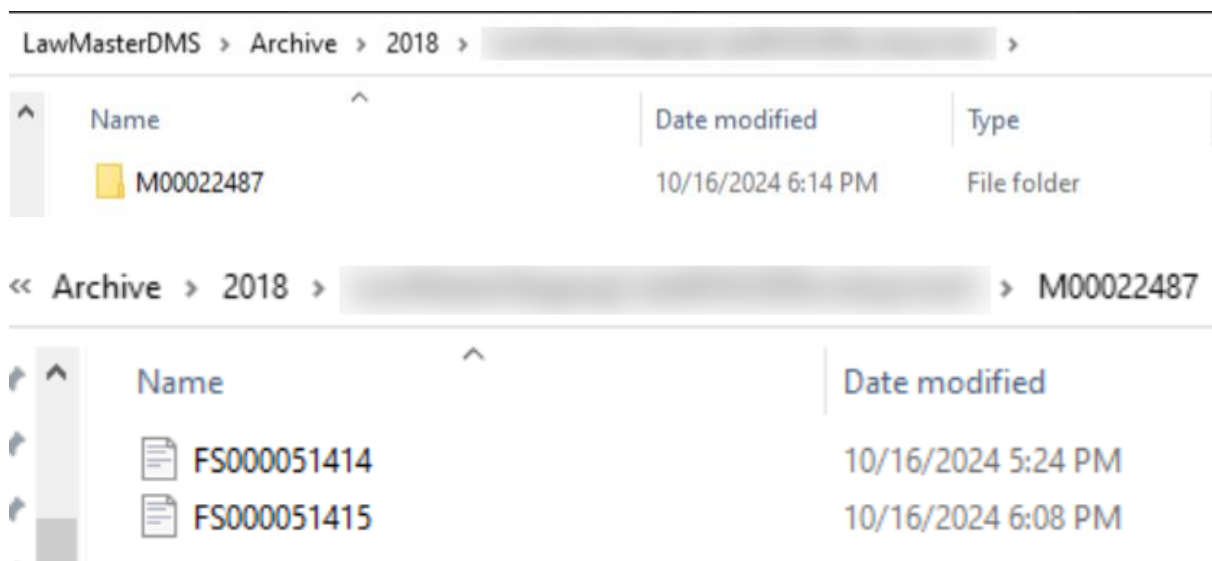
Clients may wish to move Archived Documents to an external storage location outside of LawMaster, for hosted clients, this can be arranged by submitting a LawMaster Support ticket. After the files have been moved out of the LawMaster DMS the folio metadata will remain, but the files will not be accessible from within the LawMaster application.

Archived files are moved to an external location by selecting the sub-folders from within the Archive Directory, in the screenshot below, the folder **2018** together with its contents would be selected and moved to a nominated location.

Users should be made aware that once the files have been moved from the DMS they will no longer be accessible from within the LawMaster product. If a folio that has been moved is selected in LawMaster, the user will be presented with an error message such as “Could not find file...” or “500 Internal Server Error”.

If a user wishes to access files that have been moved, they will need to take note of the Archive Directory, Matter No. and Storage ID from the folio record to locate the file. Matter files are saved to a folder named M + Matter Number. Files are named FS + Storage ID, as per the screenshots below.

Folio No	Storage ID	Date of Writing	Precis	Server Path	Archive Directory
41695	51415	16/10/2017	Letter to client endorsing client agreement for signature and return	G:\LawMasterDMS\archive\2018\	M00022487\FS000051415.docx
41693	51414	14/08/2017	Letter to client confirming details of Trust Account	G:\LawMasterDMS\archive\2018\	M00022487\FS000051414.docx



The screenshot shows the 'Archive' directory in LawMasterDMS. The path is 'LawMasterDMS > Archive > 2018 >'. Inside the '2018' folder, there is a sub-folder named 'M00022487'. Within this folder, there are two files: 'FS000051414' and 'FS000051415'. The 'Date modified' column shows the files were last modified on 10/16/2024 at 5:24 PM and 6:08 PM respectively.

Reinstate Files to LawMaster DMS

If the client wishes to reinstate the moved files back to LawMaster it is important the folder structure and file names are retained as is. To reinstate the files the folders must be moved back to the original location in the LawMaster DMS. The ‘Server Path’ detailed on the Folio record within LawMaster must match the file location in the DMS.

Search for Archived or Moved Documents

Archived documents can be searched using the normal folio enquiry process and the user will be able to view or edit the document once found. If the document has been

moved and Elasticsearch is enabled the Elasticsearch index will retain the ability to 'Search within Documents' until the folio or folio storage record is modified. Modifying these details will trigger a re-index following which the user will only be able to search on the folio metadata including the folio precis.

LawMaster Support

For any questions or additional information please contact us [Submit a ticket :](https://lawmaster.com.au)
(lawmaster.com.au)

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