

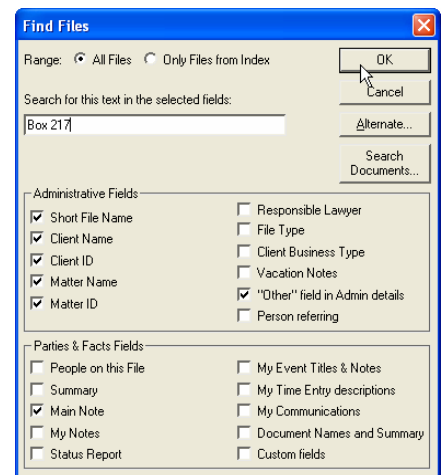
ARCHIVING - DE-ARCHIVING RECORDS

A. Special Notes about Archiving and De-Archiving

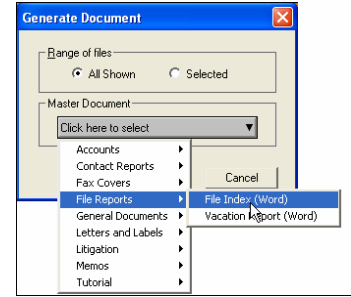
1. If you archive a batch of files and need to de-archive only 1 file, you will have to de-archive the entire batch – because of this, it is helpful to archive in batches, either by date, or some other criteria; e.g., Box numbers recorded in a custom field
2. Prior to archiving files, you may want to print (or save) a report that shows all of the information on the file – listed below in section 4.b
3. If you are selecting files to be archived by text within any field (either to print from the Amicus File Index, or when ready to Archive), the information entered must be consistent
 - a. If you are entering box numbers, be sure to be consistent about the way the text is typed
 - (i) If you enter Box217 on one file, and Box 217 on another file, you will not be able to search properly for all files with Box 217
 - (ii) If you are searching for files with Box 217, it will also find files with Box 2174
 - (iii) If you are searching for 217 in all custom fields, it may find other text that you don't want, such as '12174 Main Street' in an address field
 - b. If you wish to archive by Closed date, be sure to select the appropriate closed date when closing files
4. When files are archived, the contact(s) on the file remain in Amicus (unless you select the option 'Remove contacts if they are only on archived file' in the Create Archive process)
 - a. For the contacts that remain in Amicus, the link to any archived files is lost – prior to archiving, you may want to make a note on the contact's card to show the name of the archived file
 - b. Everything on the file is archived, including communications, events, time spent, links to documents, and any custom field information

B. Print List of Files to be Archived

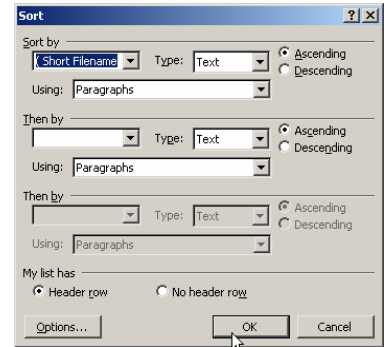
1. Prior to archiving, print a list of files to be archived
 - a. If you do not have a custom report designed to capture the information you need, create the template first
 - b. In Files, select the files to be archived
 - (i) If you use a particular field to designate Box numbers for closed files, press **Ctrl F** (Find) – type **Box ???** in Search for text field (where ??? is the Box number)
 - c. Range should be **All Files**
 - d. Fields – select only the appropriate field(s) that may contain the data you are searching for



- e. Select **FILES - Generate Document** (All Shown) – select the appropriate template
- f. **Save & Don't Attach to Brad** - give the file an appropriate name; e.g., Closed Files - Box 222

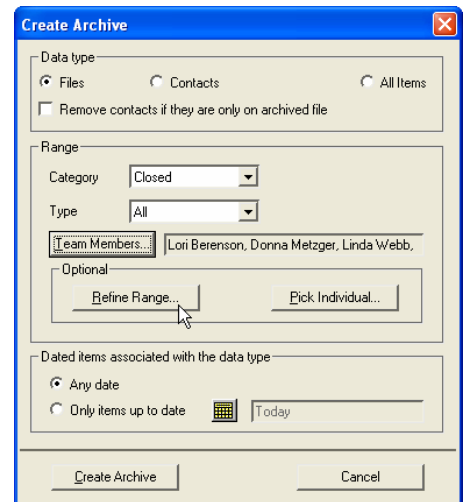


- g. Sort the report by the appropriate field, if necessary – if you have used a template that creates a table, you can sort the data in the table
 - (i) In Microsoft Word, click anywhere in the table and select **Table – Sort**; select the appropriate field, e.g., **Short Filename** as the primary sort and click on **OK**
 - (ii) In WordPerfect, click anywhere in the table and select **Tools – Sort**; select the appropriate sort definition and click on **Sort**
 - (iii) Save the file; print (optional) and close

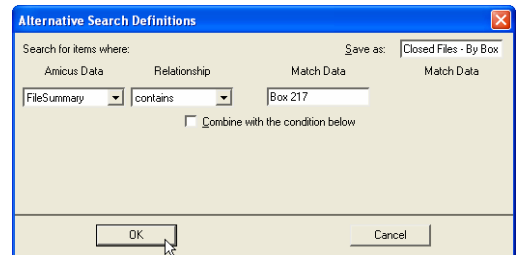


C. Archiving Files

1. All users must be logged out of Amicus
2. In Administrator, select **Database - Management - Archive**
3. Select **Files** (Data type)
4. Select **Closed** (Range - Category); **All** (Range – Type) – unless you wish to archive by File Type
5. Click on the Team Members button and select all Team Members – unless you wish to archive files that are assigned **only** to specific Team Members
6. If you wish to search for specific files using specific data in a field, click on **Refine Range** (Optional)

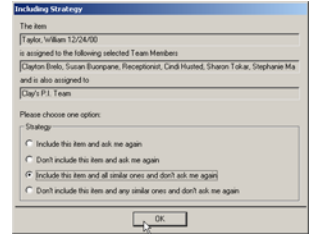


- a. For the first search, create a New Search
 - (i) Select the appropriate field (Amicus Data)
 - (ii) Select **contains** (Relationship)
 - (iii) Type the appropriate data (Match Data)
 - (iv) Name the search if you wish to use it again (Save as)
 - (v) Click on **OK**



- b. On subsequent searches, click on the name of the search and select **Edit**
 - (i) Modify any search criteria and click on **OK**
- c. Click on **OK** to complete the Alternative Search definition

7. Click on **Create Archive** – select a location to store the archive file (or keep the default Program Files\Team50\Archive)
8. Name the File appropriately and click on **Save**
9. If you see the 'Include Strategy' window, select the appropriate item – usually **Include this item and all similar ones and don't ask me again**
10. Click on **OK** to archive the files



D. De-Archiving Files

1. All users must be logged out of Amicus
2. In Administrator, select **Database - Management – De-Archive**
3. Select the box number to de-archive and click on **Open**
4. If the Select Team Member box opens, look at the first line at the top of the window '*Please select the actual name for*'
 - a. If you have transferred licenses from an old Team Member to a new Team Member, you will need to enter the new names for each old Team Member
5. When the de-archiving is complete, you will return to the main Administrator window

