

MATTER ARCHIVING

Use Partner for Windows Automated Archive Manager (AAM) to streamline your archiving processes

Anyone who does the archiving in a legal firm will know the importance of such work but they will also be aware of the significant time saving that can be achieved if this process can be automated. The Partner for Windows Automated Archive Manager is an additional archiving tool to the standard manual archiving process held within the software, which allows users to automatically archive matters in bulk.

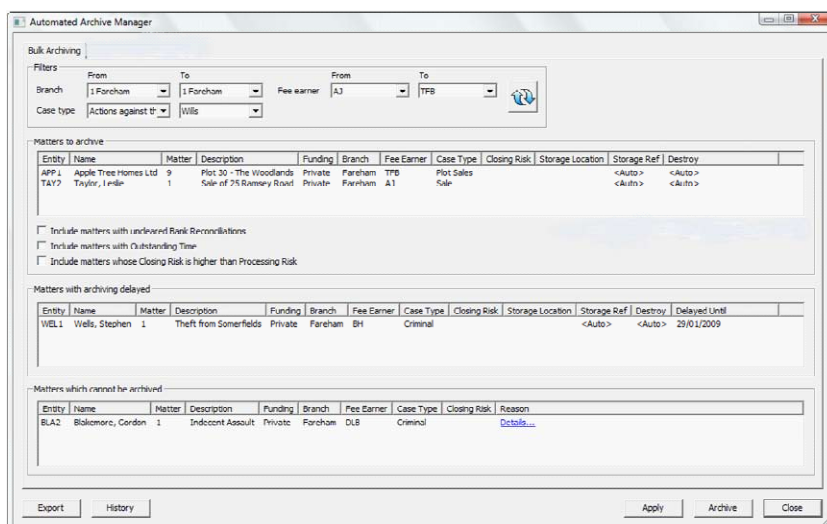
Firms that undertake volume work (e.g. re-mortgage or personal injury) have a requirement to automatically archive these matters in one process. With the Automated Archive Manager, users can batch process the archiving of matters and thus significantly speed up the amount of time taken to close each matter.

For those practices who are concerned about the large volume of transaction records being retained on their live database the Partner for Windows Extended Archive Manager is the solution. The Partner for Windows Extended Archive Manager removes this concern as all the main transaction records are moved to an entirely separate database which will improve system performance on larger data sets, reduce the time taken for backups and reduce the amount of disk space needed in the live database. In addition, this makes it easier for firms to store matters for extended periods of time.

ABOUT PARTNER FOR WINDOWS

Partner for Windows is a comprehensive practice and case management system including accounting, case and document management, time recording and billing which together form a complete system to meet the back and front office requirements of a modern legal practice.

The extensive functionality of Partner for Windows can further be enhanced using a range of specialist third party solutions designed to address key business issues for the legal profession. Each of these solutions is seamlessly integrated into Partner for Windows to ensure that the single practice and case management database remains at the core of the system.



Automated Archive Manager Screen

AUTOMATED ARCHIVE MANAGER (AAM)

- Mark a matter for archiving manually via the matter properties, or automatically via a step in Partner for Windows Case Manager
- Filter matters to be archived by branch, fee earner or case type
- Specify the archive storage locations
- Set destroy dates for archived matters
- Delay archiving of selected matters
- Automatic warning prompts as to why a matter cannot be archived

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A PARTNER FOR WINDOWS FACT SHEET

- Export and/or print lists of matters to be archived
- Launch the bulk archiving process manually or via a command prompt process
- Produce archive history reports

EXTENDED ARCHIVE MANAGER (EAM)

- Archived matters can be manually transferred to the EAM or automatically transferred as part of the Partner for Windows Automated Archive Manager process
- Filter matters to be archived by branch, fee earner, case type or archive date
- Plain English messages given
- Matters easily resurrected if required

Please note whilst Automated Archive Manager can be used independently, Extended Archive Manager can only be used in conjunction with Automated Archive Manager.

ABOUT TIKITTFB

With more than 30 years of dedication to the legal profession, TikitTFB supports over 600 legal practices throughout the UK with managing risk, ensuring compliance and enhancing profitability using our award-winning Partner for Windows Practice and Case Management system.

Partner for Windows uses industry standard Microsoft technology, enabling the software to be smoothly integrated into existing infrastructures. Catering for firms of all shapes and sizes, Partner for Windows provides a flexible and comprehensive solution which can be readily tailored to meet the needs of practices now and in the future.

Part of the Tikit Group, provider of IT services and software to 90% of the UK's top 100 law firms, TikitTFB is well positioned to make magic circle technology accessible and affordable to large regional and high street firms.

To view the latest fact sheet on Automated Archive Manager and Extended Archive Manager please visit http://www.tfbplc.co.uk/assets/library/documents/AAM_and_EAM.pdf

OTHER SOLUTIONS THAT INTEGRATE WITH PARTNER FOR WINDOWS AUTOMATED ARCHIVE MANAGER ARE:

Partner TaskCentre for business process management
Crystal Reports for data mining and report development
Digital Dashboard for business intelligence

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