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Getting Started



This chapter introduces LexisNexis Time Matters® and describes how to start the application and navigate its features.

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What's in this Guide?

The *New User Guide* introduces you to basic features of Time Matters and explains how to perform common everyday tasks. This is a good place to start if you haven't used Time Matters before.

For information on customizing the application and using advanced features, please refer to the Time Matters online Help. You can open the Help by clicking the **Help** buttons ( or ), or by pressing F1 on any screen.

Overview of Time Matters

Time Matters helps you manage and organize your day-to-day information and documents. It features centralized scheduling, document management, global search capability, and more.

Time Matters consists of one or more computers running the application and connecting to a shared database on your network.

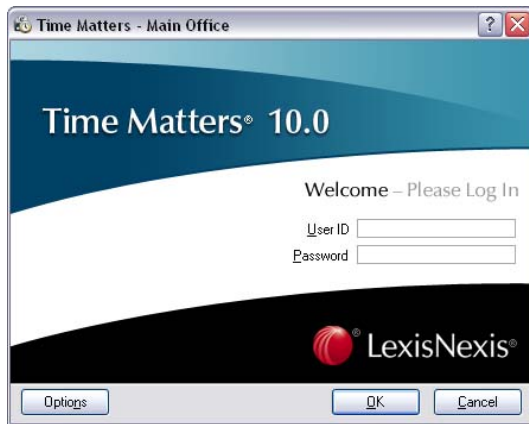
You can also use Time Matters on laptop computers. The application uses a database stored locally on the laptop whenever the laptop is not connected to your firm's network. Periodically, you will connect the laptop to your firm's network and synchronize the information you have entered in the laptop's database with the information in the main Time Matters database that is shared by all users. This ensures that all users of Time Matters have access to up-to-date information.

Starting the Application

Use either of the following methods to start Time Matters:

- On the Windows Start menu, go to **All Programs > LexisNexis > Time Matters 10.0**.
- Double-click the **Time Matters 10.0** shortcut icon on your Windows desktop.

When the Time Matters login screen opens, type your user ID and password in the corresponding fields and click **OK**.



The application will open, displaying the initial screens that are selected for your user account. These may include a Tips screen, a screen of Alerts and Reminders about upcoming events and tasks, and the Navigator window. (These elements are described in later sections of this guide.)

The screens that appear when you start Time Matters are customizable. For instructions on customizing these and other options for your user account, refer to the Time Matters Help file.

Using Training Mode to Practice

You can use Time Matters in either Normal mode or Training mode. Training mode uses a separate database and lets you practice using the program without affecting your real data.

Normal Mode

- Accesses your main database containing real data
- Is used for daily work, entering and modifying real data, and making customizations

Training Mode

- Accesses a tutorial database with sample data
- Is used to train new users and try out application features and settings without affecting real data



Always use Normal Mode to enter real data or to make customizations that will be used. Do not enter real data in Training Mode.

To Start the Application in Training Mode

- On the Windows Start menu, go to **All Programs > LexisNexis > Training Mode - Time Matters 10.0**.

There is a default login used for Training Mode:

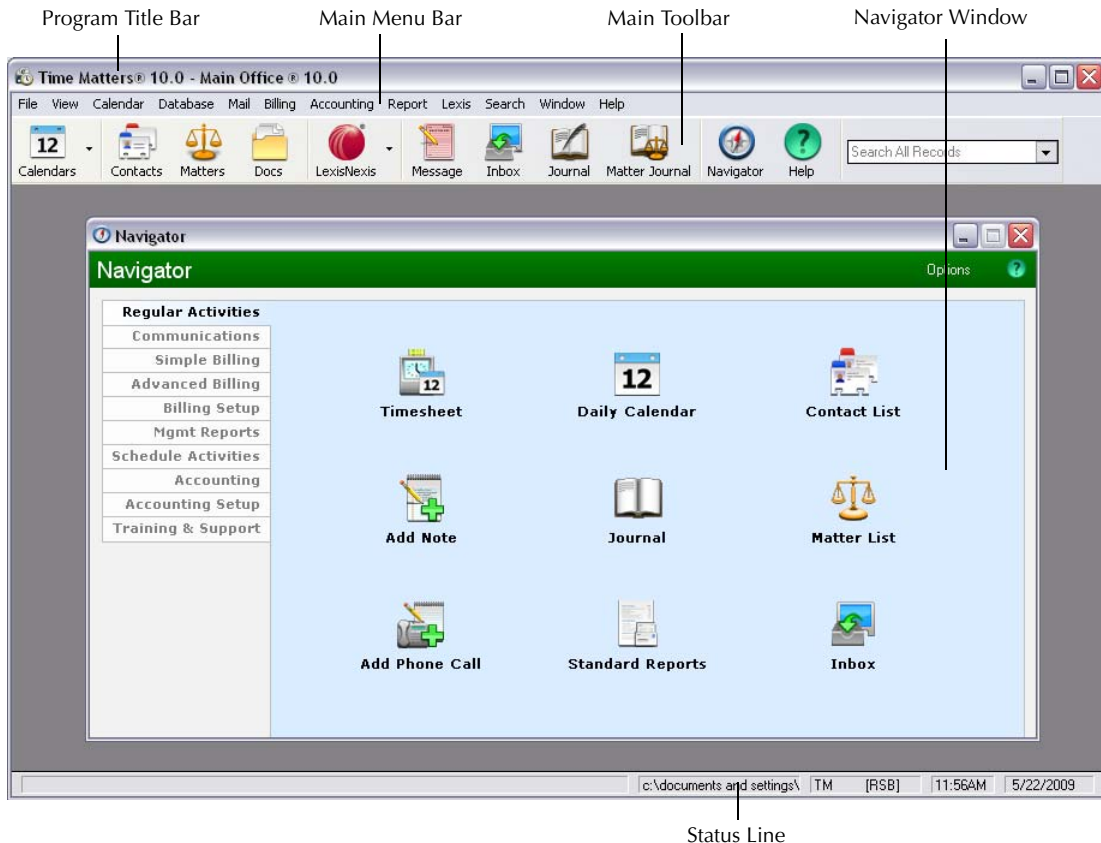
- TM is the user name
- TM is the password

After you enter this login, you will be asked whether you want to update the sample data. This option simply adjusts the dates of many sample records so that they reflect the current date.

It is a good idea to log in using Training Mode as you go through this guide, and practice using the features described in it.

Getting Around in the Application

When you start the application, the screen will look similar to the following:



Screen Elements

Program Title Bar—The program title bar shows the application version you are using and the description of the File Locations file. The title bar also shows which database you are using, such as the tutorial database used in Training Mode or your Main Office database.

Main Menu Bar—The main menu bar is located immediately below the program title bar, at the top of the screen. Some menus are only available when a list is open.

Main Toolbar—Below the main menu bar is the main toolbar. The toolbar buttons open application features directly without the need to navigate through menus.

Status Line—At the bottom of the screen is the status line. It displays the open database, the current user, and the time and date. It also shows the number of records displaying on lists when records are tagged.

Navigators

Use navigators to access many application features from one convenient location. Each navigator includes a set of buttons connected to related tasks. Multiple navigators for different sets of tasks are accessible from the main Navigator screen.

To Display the Navigator Screen

- On the View menu, click Navigator
- or-
- Press the hot key CTRL+N



Entering Initial Data

Your Time Matters administrator should set up user accounts, Staff members, and security settings before the application comes into general use at your firm.

After those administrative settings are made, you should begin entering data into the program. The following is the recommended order for doing so. Following this order can save you some time.

Recommended Order For Initial Data Entry

1. Create Classification Codes: go to **File > Setup > Codes > Classification Codes**.
(Classification Codes are optional, but useful for categorizing your records. See the application Help file for instructions on setting them up.)
2. Create Contacts: click **Contact** or go to **Database > Contact List > All Contacts**.
Entering Contacts before Matters makes it easier to create Matters later on, because much of the Matter form can be completed automatically by selecting an existing Contact.
3. Create Matters: click **Matter** or go to **Database > Matter List > All Matters**.
4. Create Events and ToDo's: go to **Calendar > Event List > All Events**; go to **Calendar > ToDo List > All ToDo's**.

Shortcuts and Hot Keys

Time Matters uses standard shortcut keys for Windows-based applications, such as CTRL+C and CTRL+V to copy and paste in text fields. TAB advances the cursor to the next position, and SHIFT+TAB returns to the previous position.

Time Matters also has its own shortcut keys to allow fast keystroke-based navigation.

List Hot Keys	
Keyword	CTRL+K
Find (search Calendar and List text)	CTRL+F
Tag highlighted record	SHIFT+T
Tag record (QuickPik disabled)	T
Untag highlighted record	SHIFT+U
Untag record (QuickPik disabled)	U
Tag all records in List	CTRL+T
Untag all records in List	CTRL+U
Add Record	INSERT
Delete current	DELETE
Change current	ENTER
Move highlight bar to top of List	Home
Move highlight bar to bottom of List	End
Move to next page of records on List	Page Down
Move to the previous page on a List	Page Up
Move to the beginning of the List	CTRL+Page Up
Move to the end of the List	Down
Alarm (Event or ToDo List)	CTRL+A
Event (open)	F3
ToDo (open)	F4
Contact (open)	F5
Matter (open)	F6
Note (open)	F7
Phone Call (open)	F8
Document (open)	F9
Email (open)	F11
Personal Inbox	CTRL+I
Billing (open)	F12
Invoice List	ALT+F12
Review List (open)	ALT+SHIFT+R
Triggers	CTRL+SHIFT+G

Calendar Hot Keys	
Daily (open)	CTRL+F3
Weekly (open)	ALT+F3
Personal Journal (open)	CTRL+J
Contact Journal (open)	SHIFT+F5
Matter Journal (open)	SHIFT+F6
Reference Calendar (open)	ALT+F2
Expanded Mode	CTRL+E
Show Hidden	CTRL+H
Alarm	CTRL+A

Record Hot Keys	
Contact (open)	CTRL+SHIFT+C
Matter (open)	CTRL+SHIFT+A
Event (open)	CTRL+SHIFT+V
ToDo (open)	CTRL+SHIFT+T
Custom Form (open)	CTRL+SHIFT+F
Note (open)	CTRL+SHIFT+N
Phone Call (open)	CTRL+SHIFT+P
Document (open)	CTRL+SHIFT+D
Email (open)	CTRL+SHIFT+E
Mail (open)	CTRL+SHIFT+L
Web (open)	CTRL+SHIFT+W
Outline (open)	CTRL+SHIFT+O
Billing (open)	CTRL+SHIFT+B
Spell Check	CTRL+K
Next Record	CTRL+>
Previous Record	CTRL+<
Dial Phone	CTRL+D
AutoEntry Form	CTRL+A
Triggers	CTRL+G
Print	CTRL+P
Lookup (in a field)	F2

Other Hot Keys	
Program Level Setup	ALT+SHIFT+P
User Level Setup	ALT+SHIFT+U
Workstation Level Setup	ALT+SHIFT+W
Navigator	CTRL+N
Help	F1
Combined Search (in a List)	F2
Copy to Clipboard	CTRL+C
RSS News Reader	ALT+SHIFT+N
Paste from Clipboard	CTRL+V
Find (search Calendar and List text)	CTRL+F
Date Calculator	SHIFT+F2
Timer Control	ALT+F10
Messenger Window	CTRL+M
Send Message	CTRL+SHIFT+M
In / Out List	ALT+SHIFT+L
Tip of the Day (next tip)	ALT+N
Tip of the Day (close screen)	ALT+C
Exit	ALT+F4

Common Tasks

This section provides quick instructions on how to perform some of the most common tasks in Time Matters, such as creating Contacts and Matters.

Note: Some of these procedures assume that your Time Matters administrator has set up certain features of the product, such as integration with your office telephone system and Formattable Clipboard templates.

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Creating Contacts

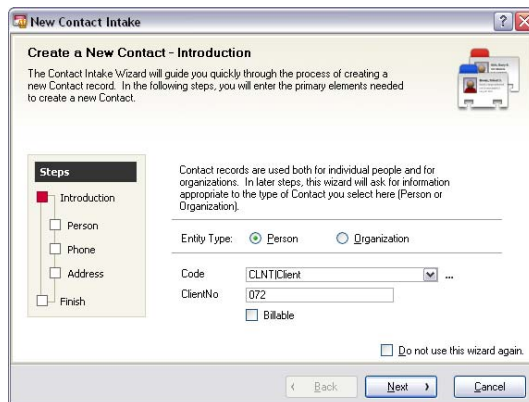
The Contact record stores addresses, phone numbers and other contact information, as well as listing other records in your database that are linked to the Contact.

Create a Contact record for any organization or person you have information about, such as clients, attorneys, judges, and businesses. Your Contact list is like an electronic address book or card index.

You can create a new Contact record using any of the following methods:

- Click the **Add** button on the Contact list toolbar.
- Click the **File** menu, point to **New Record**, and click **Contact**.
- Press the hot key CTRL+SHIFT+C.

By default, the New Contact Intake wizard appears whenever you perform one of these actions. The wizard presents several of the most commonly used data fields on the Contact form. If the wizard has been disabled, then performing one of these actions opens the full Contact form instead.



The New Contact Intake wizard

Top section of the Contact form

The first thing is to decide whether the Contact is a person or an organization.

- If you are in the New Contact Intake wizard, select the **Person** or **Organization** option button.
- If you are on the Contact form, click the button beside the top left field to toggle the label between **Full Name** (for a person) and **Org Name** (for an organization).



You do not need to enter any information other than the Contact's name before you complete the wizard or save and close the Contact form. You can open the Contact again later to add more information.

The next step is to complete the **Code** field by choosing a Classification Code for the Contact. These codes describe different categories of Contacts, such as clients, attorneys, accountants, or corporations. If the Contact is a client, for example, you would select "Client" in the **Code** field.

Depending on how Time Matters is customized for your office, the Classification Code you select might change the labels of data fields or even make a different selection of fields available. This is why it is best to select a Classification Code before completing the rest of the New Contact Intake wizard or the Contact form.

Enter the information you have for the Contact on the remaining screens of the New Contact Intake wizard or on the Primary, Secondary and Additional tabs of the Contact form. Most of the time, you only need to use fields on the Primary tab of the form.

Some fields have Lookup buttons (☰) beside them. You can click the button to open a list of possible field values. For example, you can click the Lookup button beside the **Staff** field to view a list of Staff members. You can also use this feature to select more than one Staff for the record.

When you are finished entering information, click the **Save** button to close the wizard, or click the **Save & Close** button to close the Contact form.

Creating Matters

Create a Matter record whenever you need to collect and record information about a new case, project, or job that you perform for a client. The Matter record stores information about all the parties involved in the Matter and provides lists of other records linked to the Matter.

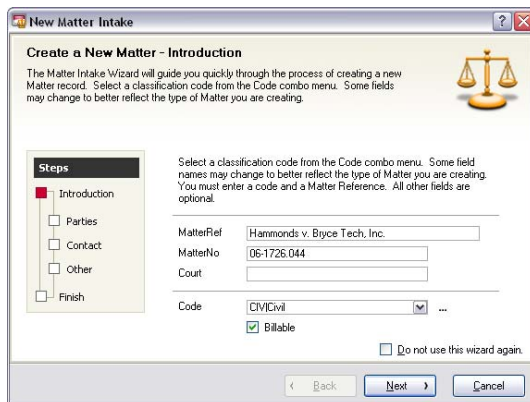


Because a majority of the information in a Matter record is about the parties involved in the Matter, it is often easiest to create Contact records for those people and organizations before creating the Matter.

You can create a new Matter record using any of the following methods:

- Click the **Add** button on the Matter list toolbar.
- Click the **File** menu, point to **New Record**, and click **Matter**.
- Press the hot key CTRL+SHIFT+A.

By default, the New Matter Intake wizard appears whenever you perform one of these actions. The wizard presents several of the most commonly used data fields on the Matter form. If the wizard has been disabled, then performing one of these actions opens the full Matter form instead.



The New Matter Intake wizard

The only field you are required to complete when creating a new Matter is the **MatterRef** field. Type a name for the Matter in this field. Your office might have a standard naming convention for Matters, which you should follow whenever applicable.


The next step is to complete the **Code** field by choosing a Classification Code for the Matter. These codes describe different categories of Matters, such as civil cases, bankruptcy cases, and real estate cases. If you are representing the plaintiff in a personal injury case, for example, you would select "PI Plaintiff" in the **Code** field.


Depending on your office's customizations, the Classification Code you select might change the labels of data fields or make a different selection of fields available. This is why it is best to select a Classification Code before completing the rest of the New Matter Intake wizard or the Matter form.

Complete as many fields as possible on the remaining screens of the New Matter Intake wizard or on the Matter form. Most of the time, you only need to use fields on the Primary tab of the form.



You can save and close the Matter form without completing it. You can open the Matter again later to add more information.

Some fields have Lookup buttons () beside them. You can click the button to open a list of possible field values. For example, you can click the Lookup button beside the **Staff** field to view a list of Staff members. You can also use this feature to select more than one Staff for the record.

If a field asks for the name of a person involved in the Matter, click the Lookup button beside the field to select that person from your Contact list. Often, this completes other fields with information about the selected Contact. The Lookup button changes its appearance to a double arrow () to indicate that the Contact in the field is related to the Matter.

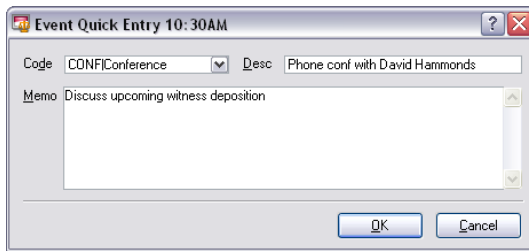
When you are finished entering information, click the **Save** button to close the wizard, or click the **Save & Close** button to close the Matter form.

Creating Events

You can create and manage Events on the Calendar just as you can on a record list. Changes to Events that you make on the Calendar are reflected on the Event record list, and vice versa.

Quick Entry

The Quick Entry feature is a convenient way to add simple appointments to the Daily Calendar. To add an appointment using Quick Entry, just click a time slot on the Daily Calendar and begin typing a short description of the appointment. The Quick Entry screen opens to allow you to add a memo and select a Classification Code that describes the appointment. Click **OK** when you are finished.



The Quick Entry screen

Quick Entry creates an Event record on the Calendar. You can double-click this Event to open it and add more information if you need to.

Event Form

For most appointments, you need to fill out an Event form with details on the purpose of the appointment and its participants.

To open an Event form from the Calendar, first display the date of the appointment on the Calendar by selecting that date on the Reference Calendar or the **GoTo** field. Then click the day (and time, if using the Daily Calendar) and press **INSERT** or click the **Add** button on the Calendar toolbar. If you are on the Weekly or Monthly Calendar, you will be asked whether you want to create an Event or a **ToDo**. Select **Event** and click **OK**.

The only fields you are required to complete on the Event form are the **Date**, **Time**, and **Description** fields. The **Duration** field (to the right of the **Time** field) automatically displays the number of hours represented by the start and end time you enter.



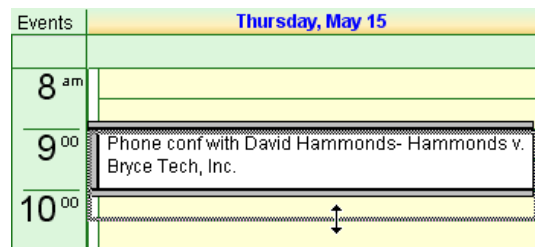
The **Time** field accepts abbreviations. For example, you can type 11a-130p and when you leave the field, it will change to display 11:00am-1:30pm.

Often, an Event will be related to a Contact or Matter in your database. Click the Lookup button beside the Regarding fields to select from a list of Contacts or Matters.

When you are finished entering information, click **Save & Close** to close the Event form. The Event appears on the Calendar and the Events list.

After creating an appointment, you can modify the Event's time or duration on the Daily Calendar.

- To change an Event's time, place the cursor over the bar on the left edge of the Event, click and hold the mouse button, and drag the Event to the desired time slot.
- To change an Event's duration, place the cursor over the lower edge of the Event, click and hold the mouse button, and drag the edge to the desired end time for the Event.




An Event on the Daily Calendar

Creating ToDo's

ToDo's and Events are similar. The main difference is that ToDo's are Date specific, whereas Events are Date and Time specific. Typically, ToDo's are tasks that must be completed on or by a specific date but not by a particular time on that date. These tasks can be writing a letter, completing a form, etc.

On Daily and Multi-Day calendars, ToDo's are displayed at the bottom of the screen in an area below the Events area. On Weekly and Monthly calendars, ToDo's are displayed in a list together with Events that are scheduled for the same day.

To open a ToDo form from the Calendar, select the date of the ToDo on the Reference Calendar or type it in the **GoTo** field. Click the date (click inside the ToDo area if you are on the Daily Calendar) and press INSERT or click the **Add** button () on the Calendar toolbar. If you are on the Weekly or Monthly Calendar, you will be asked whether you want to create an Event or a ToDo. Select **ToDo** and click **OK**.

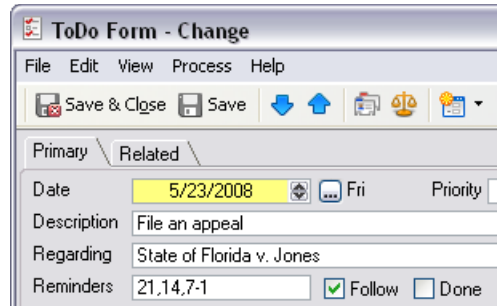
The only fields you are required to complete on the ToDo form are the **Date** field and the **Description** field. The **Date** field should contain the date by which the task must be completed.

When you are finished entering information, click **Save & Close** to close the ToDo form. The ToDo appears on the Calendar and the ToDo's list.

Reminders

Reminders are important for keeping track of ToDo deadlines. In the **Reminders** field on the ToDo form, type the number of days before the due date that you want a reminder to appear on the Alerts, Reminders and Watches screen.

For example if you type 3, a reminder will appear 3 days before the ToDo's due date. You can also type number ranges, such as 5-1 (the larger number must always be first), to have a reminder appear on each of the 5 days before the date of the ToDo. Separate multiple entries in the **Reminders** field with commas. For example: 21, 14, 7-1.

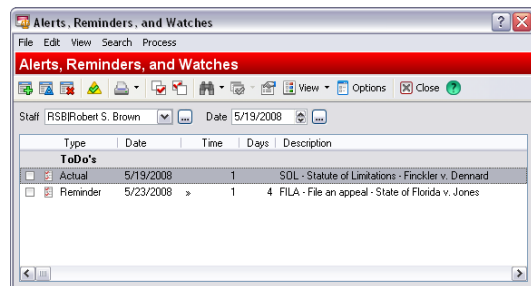


Reminders field Follow check box Done check box

Marking the ToDo "Done"

Selecting the **Done** check box on the ToDo form indicates that the task the ToDo represents has been completed. You can also mark a ToDo as Done from the Calendar by right-clicking the ToDo and selecting **Mark as Done** from the options menu.

The **Done** check box interacts with the **Follow** check box on the ToDo form. When **Follow** is selected, if the ToDo is not marked Done by the time its due date arrives, the **Date** field will automatically advance on each successive day until the ToDo is marked Done. This keeps the ToDo on your calendar and on the Alerts, Reminders and Watches screen until it is marked Done.



Alerts, Reminders and Watches screen

Creating Phone Records

Create Phone Call records to keep track of both outgoing and incoming calls.

To create a Phone Call record, click the **Add** button on the Phone Call record list, or press the hot key CTRL+SHIFT+P. The Phone Call form opens.

The only fields you are required to complete on the Phone Call form are the **Date** and **Time** fields, which are completed automatically with the current date and time when you open the form.

In the **In From / Out To** field, click the field label button to toggle the label between “In From” and “Out To”, depending on whether you are making a phone call or receiving one. Click the **Lookup** button (☰) beside the field to select from your list of Contacts the person from whom the call was received or to whom it is being made. Information from the selected Contact record is used to complete the **Regarding** field and **Phone** number fields automatically.

Detail of the Phone Call record form

When you are finished entering information, click **Save & Close** to close the Phone call form.

Timing Phone Calls

You can set up Phone Call records so that the Timer starts automatically when you create a new Phone Call.

On the Forms tab of User Level Setup, select **Phone Calls** in the drop-down list and click **Set Form Options**. The User Form Options screen opens. Click the Timer tab and select the option to start the timer when the form is opened in Add mode.

Using the Dialer

Some record form fields are set up to hold phone numbers. Click the action button (☒) beside a phone number field on any record form to open the Dialer screen. If Time Matters integration with your phone system has been set up, you can use the Dialer to dial a number on your telephone.

Before you click the **Dial** button, select the dialing options you want. Select **Open Phone Call** or **Open Note** to open a Phone Call or Note form when you begin dialing. Select **Start Timer** if you want the Timer to start automatically when you begin dialing. Alternatively, you can click the **Timer** button to open the Timer manually.

The Dialer screen

Creating Documents

Time Matters provides several ways to create a Document record and associate it with a file or document. You can begin with an existing file or document and create a Document record for it, or use document automation features like the Formattable Clipboard to author a new document and create a Document record at the same time.

Adding an Existing Document to the Time Matters Database

There are several ways to create a Document record for an existing file or document. The simplest methods are to use the TM Save and Send to Time Matters features.

TM Save

The **TM Save** button appears on the toolbar of your word processor or other application. It is available in the following applications:

- Word 2000, XP, 2003, and 2007
- WordPerfect 10 – 12, X3, and X4
- Excel XP, 2003, and 2007
- PowerPoint XP, 2003, and 2007
- Adobe Acrobat 5.0, 6.0, 7.0, and 8.0
- Internet Explorer 5.0 and later
- Mozilla Firefox 2.0 and later



If the **TM Save** button does not appear on the toolbar of your application and is not an available option when customizing the application toolbar, ask your administrator to install TM Save.

To use TM Save, simply open a document in a supported application and click the **TM Save** button on the application toolbar. Time Matters will open if it is not already running (possibly requiring you to log in).

A Document Form opens with the file name already filled in. Complete the rest of the Document form and click **Save and Close**.

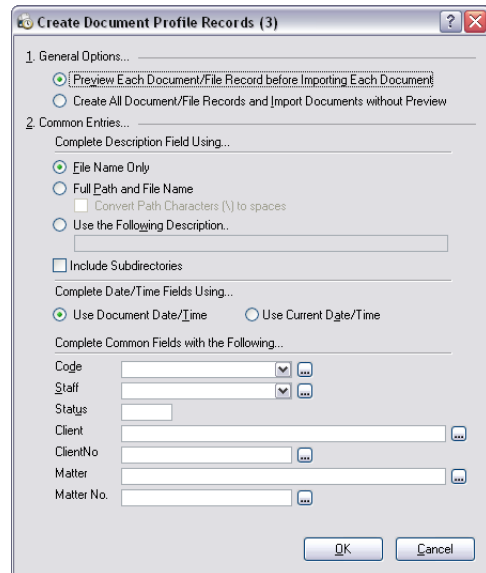
Send to Time Matters

In Windows Explorer, locate the file(s) for which you want to create Document records. Select one or more files and right-click a selected file to open the options menu. Point to **Send To** and select **Time Matters 10.0**. Time Matters will open if it is not already running (possibly requiring you to log in).

The Create Document Profile Records screen opens. Select whether you want to preview each Document record as it is created, and select entries that are common to all the Document records you are creating.

For example, if all the records are medical records for a single case assigned to a particular Staff member, you could select the Medical Records Classification Code in the **Code** field, the Staff member assigned to the case in the **Staff** field, and the Client and Matter name for the case in those respective fields.

Click **OK** to create the Document records with the settings you have chosen.



The Create Document Profile screen

Creating a New Document Using the Formattable Clipboard

The Formattable Clipboard lets you copy data from multiple fields of a record at one time, and paste it into a document using a predefined layout. You select the record to copy and the template that defines the layout and formatting you want to use.

To Create a New Document Using the Formattable Clipboard

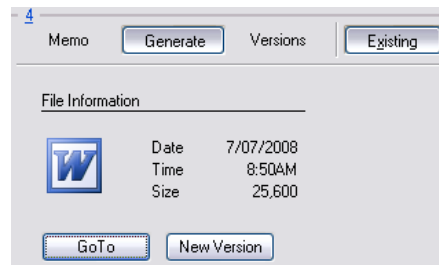
1. On the Document list, click the **Add** button to open a new Document form.
 2. In area 4 of the Document form, make sure the **Clipboard** button is selected.
 3. Click **Data Source**.
 4. On the **Select Record Type** drop-down list, select the type of record whose data will be used to create the document.
 5. Click the **Add** button. A list of records of the selected type opens. Select the record(s) whose data will be used to create the document and click **OK**.
 6. Click **Template**. The Template tab is divided into two lists. The left list shows document templates used as a basis for the new document. The right list shows Formattable Clipboard templates used to copy specific information from the record you selected as the Data Source.
 7. Select a document template in the left list and a Formattable Clipboard template in the right list.
 8. Click the **Create** button.
 9. If you are prompted to enter information for the template you selected, do so and click **OK**.
 10. A new blank document will open in the program associated with the template you selected.
 11. Press CTRL+V to paste the information that was copied to your Windows Clipboard.
 12. Complete the document and save it.
-

Creating a New Version of an Existing Document

You can manage multiple versions of a document using a single Document record in Time Matters. Just open the Document record and use the New Version feature whenever you want to create a new version of the document.

To Create a New Version of an Existing Document

1. On the Document list, open a Document record.
 2. In area 4 of the Document form, click the **Existing** button. The bottom area of the record form displays information about the current version of the document: its size and the date and time of the most recent version.
Note: You can view a list of previous versions of the document by clicking the **Versions** button.
 3. Click the **New Version** button. The current version of the document opens in the program associated with the document's file type.
 4. Make the desired changes to the document. Save and close the document when you are finished.
 5. In Time Matters, save and close the Document record form. The next time the record is opened, it will show your updated version of the document as the current version.
-



Detail of Area 4 of the Document form

Viewing Information in Your Database

Time Matters presents your Contacts, Matters, and other information in the form of lists and records. This chapter describes how to use lists and records to view the information you need. It also describes how to use several program features that make it easier to work with records.

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Record Lists

The main record lists are the starting point for locating, viewing, and managing records. The Contact list, for example, lets you view, add, and update Contact records.

Displaying Main Record Lists

You can open a main record list by clicking the corresponding button on the main toolbar or by pressing the list's hot key:

List Type	Hot Key	List Type	Hot Key
Event	F3	Phone Call	F8
ToDo	F4	Document	F9
Contact	F5	Email	F11
Matter	F6	Billing	F12
Note	F7		

You can also open a list using options on the main menu bar. Many record lists are accessible from the Database menu, but Event and ToDo lists are on the Calendar menu, and other record lists are located on other menus.

Elements of a Main Record List

Although you can customize the appearance of the main record lists, the default appearance of a list commonly includes these elements.

Table of Records

The main area of the list shows records in a table. Each column of the table displays a piece of information from the record. For example, the **Last** and **First** columns on the Contacts list show the last name and first name, respectively, of each Contact.

If you double-click a Contact in the list to open the Contact record, you will see that the information on the list comes from fields on the record form. Each column matches a particular field.

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Task Panel

The Task Panel appears on the left side of main record lists and provides convenient one-click access to various program features. Clicking an item on the Task Panel opens the related feature.

Time Matters automatically groups Task Panel controls of similar types into collapsible boxes. All controls that open record lists, for example, are grouped into the "Navigate" box.

List Toolbar

Buttons on the list toolbar access program features. Most buttons perform an action on the record(s) you have highlighted on the list.

Power View

The Power View area lets you preview details of the record currently selected on the list without having to open the record form.

The various Power Views show information from different record fields. All record types provide the Form View and the Summary View. Contact and Matter records include additional views.

Quick Tabs

A Quick Tab is basically a saved search that you can apply at any time to filter the records in a list. For example, the Contacts list might have a Quick Tab set up to display only Contacts that are classified as Clients and are assigned to you. You might name the tab "My Clients".

You can select a Quick Tab on the Task Panel, in the collapsible box labeled Quick Tabs. You can also customize the record list to display Quick Tabs along the top.

Common List Controls

All lists have some fields, and buttons in common.

Changing the Sort Order of a List

Click a column label to sort the list by that field. Click the column label a second time to change the sort order from ascending to descending (alphabetically or numerically, depending on the field type).

Pop-Up Menus

Right-click a record on a list to open a pop-up menu. Add, Change, and Delete are always available. The available commands vary by list.

List Search Box

By default, the first item on a list toolbar is a search box. To perform a simple text search of the record list, type text into this field and then exit the field by pressing TAB or clicking elsewhere on the list.

The list will be filtered to display only records in which the search text was found. Cancel the filter by clicking the Search button on the toolbar.












Common Symbols

A symbol within a record entry on a list indicate that a record has a special status. The following table lists the symbol characters used and what each symbol indicates.

Symbol	Indicates
!	Events have a time conflict. Appears in the Time/Dur column.
⌘	Event or ToDo is the Master (or Parent) Record in a record Group. Appears in the day of week column.
.	Event or ToDo is a Grouped (or Child) Record in record Group. Appears in the day of week column.
§	Record is part of a Schedule Chain. Appears in the day column.
@	Record has an Alarm set. Appears in the Alarm column.
\$	Event or ToDo has been Billed. To show this symbol, go to File > Setup > General > Program Level > Lists and select the Show \$ in Status Field check box. Appears in the status column.
~	“Specified” Related Record. Appears before record information on the Related tab of an open record.

Common Buttons on List Toolbars

Although toolbar buttons may vary from list to list and are also customizable, the buttons in the following table are common to most list toolbars.

Button	Description
	Add Record: Opens a blank form to create a new record.
	Change Record: Opens the completed form to view or edit the record.
	Delete Record: Deletes selected record.
	Search Records: Opens the Search Criteria screen. Click the binoculars to open the default Search type; click the down arrow for other search options.
	Process Records: Processes tagged records. Clicking the button opens the default Process. Clicking the down arrow shows other Process options.
	Dial Phone: Opens the Dialer to dial any phone number in a selected record.
	Print Records: Prints a report using tagged records or a report set up in the Report Specifications screen.
	Tag All / Untag All: Tag all or untag all records in a list. You can also click the list and press CTRL+T to tag all or CTRL+U to untag all.
	Copy to Clipboard: Copies the tagged records into the Windows Clipboard using a Formattable Clipboard template. Copy Record: Copies the selected record to a new record.
	Bill Tagged Records: Open a Billing Item record for each tagged record.
	Properties: Displays information about a record: when it was created, who created it, if it is linked to another record, etc.

Record Forms

Forms are a collection of entry fields where the information for one record is entered. While each record type has its own unique entry fields, there is similarity in how the forms themselves work.

Double-click a record on a list to open the record form, or highlight the record and click the **Change** button on the list toolbar.

To open a new, blank record form, click the **Add** button on the list toolbar.

Record forms are divided into different areas, each containing a set of related data fields. Area 1, at the top of the form, always includes fields to name the record, to assign Staff members to the record, and to assign a Classification Code to the record.

Other areas contain user-customizable fields to collect the data your office requires.

Fields That Link to Other Records

You can link record forms to each other to simplify data entry.

A Contact or Matter field on the main record forms has a Lookup button to the right of the field. When a Contact or Matter is selected from the Lookup list, the field and related fields – such as address and phone number – are completed automatically.



A link exists if a double arrow is displayed on the Lookup button.

When a linked Contact or Matter record changes, the information is updated on every form to which that record is linked.

Deleting the contents of the Contact or Matter field used to set up the link unlinks the records.

Field labels appear to the left of a field.

Form toolbar

Field labels appear to the left of a field.

Form toolbar

Form tabs

Lookup buttons

Almost all the fields on record forms are customizable.

Form Tabs

Use form tabs to select different sets of information on a form. In the portion of the form below Area 1, each tab displays additional data fields or sublists of records that are related to the current record.

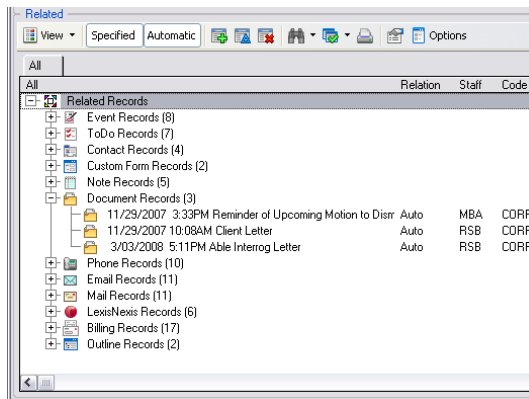
Primary Tab—All records have a Primary tab that includes the field information and the memo field. Area 1 (top) is the information most commonly used. The fields in this area form the basic structure of the application, and have limited customization. Areas 2 and 3 can be either Address fields or user-definable fields. Areas 4 and 5 are user-definable fields and Area 6 is typically the Memo field.



The first user field in Area 5 of Contact and Matter forms is the linking field to Billing programs. The field label changes depending on the Billing Option selected.

Secondary and Additional Tabs—Contact and Matter forms have Secondary and Additional tabs. These each contain six areas that can be complete name, address, and phone number sections or other user-definable fields.

Related Tab—This tab shows all records related to the current record. Some records are related by sharing the same Staff, or the same Contact or Matter in the Regarding field, while others have user-specified relationships.



Each of the remaining tabs – Custom, Notes, Documents, Phone, Email, Mail, Lexis, Outline, and Billing – displays related records of a particular type. These records may be related to the current record by sharing the same Staff or the same Contact or Matter in the Regarding field, or they may have user-specified relationships.

Some form tabs might not be enabled on your record forms. Refer to the online Help for instructions on enabling form tabs.

Records by Type

The main record types are Contacts, Matters, Events and ToDo's. The supporting record types are Notes, Custom Forms, Documents, Phone Calls, Emails, Mail, Outlines, Web (Lexis), Billing Item records, and User Defined records.

Contacts

The Contact record is the basis of client relations management. This form is used to collect information about a person, organization, or business. Any piece of information collected about this entity appears somewhere on this form.

Click the label of the first field to toggle between "Full Name" and "Org Name". Full Name is used to gather data for a person, and Org Name is used for an entity such as a business.

To create a new Contact record, click **Add** on the Contact list or press the hot key CTRL+SHIFT+C. If the New Contact Intake wizard is enabled, the wizard opens; otherwise the Contact form opens.

Matters

Depending on options set up at the Program Level, the Matter record may be an Engagement, Matter, Project, Order, Case, Account or Job. In this guide, Matter is used to refer to all terms.

The record form stores all information about a Matter in one place so that anything regarding the Matter can be found quickly. By linking other records to the form, all Phone Calls, Notes, Events, ToDo's, etc., that are related to this Matter can be easily found.

The Matter form has a unique area called the Caption Area. This area is optionally displayed using the View menu on the form. Use this area to type a larger description of a Matter.

To create a new Matter record, click **Add** on the Matter list or press the hot key CTRL+SHIFT+A. If the New Matter Intake wizard is enabled, the wizard opens; otherwise a Matter form opens.

Events

Events are meetings, conferences, or any appointment occurring at a particular time and date. (Events are similar to ToDo's, but are time- and date-based, whereas ToDo's are date-based only.) Events and ToDo's both appear on the Daily Calendar, and track the tasks completed each day.

To create a new Event record, click **Add** on the Event list or press the hot key CTRL+SHIFT+V.

ToDo's

ToDo's are tasks that must be completed on or by a date, but not by a particular time on that date. These tasks can be writing a letter, doing research, etc. ToDo's, in combination with Event records, keep track of the tasks completed each day. These records are often used to create Billing Records.

To create a new ToDo record, click **Add** on the ToDo list or press the hot key CTRL+SHIFT+T.

Custom Forms

Custom Forms are records created using Custom Form templates that have been previously created. These templates contain user-designed fields that store data for which the standard complement of record fields does not suffice.

Area 4 of the Custom Form is used to select a template. The fields from the selected template appear on the record form and can be used like any other field on the record. After entering data, do not change the template or the data will be lost.

To create a new Custom Form record, click **Add** on the Custom Form list or press CTRL+SHIFT+F.

Notes

The Note form is used as a notepad, to gather information in Rich Text Format instead of in field format. For example, a note may be a lengthy description of a meeting or an extensive note taken during a phone call.

Area 5 of the Note form is used to enter and customize the note. The toolbar includes standard text formatting options and a spell checker.

The Note area can be expanded using the Expand button to the right of the formatting bar. Notes can be up to 32,000 characters in length (about 7-8 pages depending on font and spacing).

To create a new Note record, click **Add** on the Note list or press the hot key CTRL+SHIFT+N.

Documents

The Document form contains information about a document (letters, spreadsheets, images, etc.) and a path to that document. This form is the primary place for document generation to begin.

To create a new Document record, click **Add** on the Document list or press the hot key CTRL+SHIFT+D.

Phone Calls

The Phone Call form is used to track information about outgoing or incoming phone calls. If the form is used for recording a message of a phone call for another user, the user can be notified through the Messaging system.

To create a new Phone record, click **Add** on the Phone Call list or press the hot key CTRL+SHIFT+P.

Email

The Email form is used to compose new Email messages. Files can be attached to the Email using the Attachments button.

If you receive Email from a person not on the Contact list, you can open the Email and press CTRL+SHIFT+C to create a new Contact record that has the person's full name and Email address automatically filled in. You can also create a new Event or ToDo from an open Email record, by pressing CTRL+SHIFT+V for an Event or CTRL+SHIFT+T for a ToDo. The new record will have the Email's subject in its **Description** field, and the body of the Email in its Memo area.

To create a new Email record, click **Add** on the Email list or press the hot key CTRL+SHIFT+E.

Mail

The Mail form gathers information about physical mail sent or received via the Postal Service, FedEx, UPS, a courier service, etc. Only Time and Date are required fields. In Area 2, the To button toggles to a From button. This area can accept two sets of data, the "To" and "From" information.

To create a new Mail record, click **Add** on the Mail list or press the hot key CTRL+SHIFT+L.

Web/LexisNexis

This form collects and stores information found on the Internet. Use the buttons in Area 4 to change the layout and size of the bottom part of the form. This area can contain the Web site and a memo field. It also maintains a history of browsing and searches. Go to **View > Research Bar** on a Web/Lexis form to access additional research tools.

To create a new Web/Lexis Research record, click **Add** on the Web/Lexis Research list or press the hot key CTRL+SHIFT+W. You can also create a Web/Lexis Research record by clicking the **TM Save** button on your Web browser toolbar.

Billing Item Forms

This form collects information about Expenses or Time spent for a Contact or Matter. For time entries, complete the Time and Duration fields. To track expenses, complete the Quantity and Amount fields. The form changes depending on which billing application is linked to. For details, see *Billing Item Form* on page 296.

To create a new Billing record, click **Add** on the Billing list or press the hot key CTRL+SHIFT+B.

Outlines

An Outline represents the breakdown of projects into smaller tasks, each of which can be associated with a record, such as an Event or a ToDo.

To create a new Outline record, click **Add** on the Outline list or press the hot key CTRL+SHIFT+O.

User Defined

You can define up to five custom record types to meet the individual needs of your organization. These records can be date-based or name-based.

Examples of date-based records include Deadlines, Statutes of Limitations, and Service Calls.

Examples of name-based records include Assets, Actors, and Investments.

To set up User Defined record types, go to the **Lists** tab of Program Level Setup and click the **User Defined** button. See the online Help for additional information on User Defined records.

Related Records

Related records answer questions such as “show everything for this Staff,” or “show everything for this Contact”. Related records can also be called linked records or associated records.

Instead of going to each record type and searching for relations, you can click the Related Records tab on any record of interest. This tab shows all other records that share the same Staff, or the same Contact or Matter in the Regarding field.

Relationships between records may be either “automatic” or “specified”.

Automatic Relationships

These relationships are created automatically based on the data in the fields of the respective records. For example, all records with the Brown Apparel Matter in their Regarding field are automatically related to the Brown Apparel Matter record.

Specified Relationships

Specified relationships must be created by a user. The Related Records list indicates specified relationships with a tilde (“~”) symbol.

You can create a specified relationship by:

- clicking **Add** on the Related Records list
- dragging one record on top of another record
- clicking **Add > Add Related Record** on a form tab, such as the Documents tab or Notes tab

Relationship Codes

Relationship Codes identify and classify specified relations, allowing you to indicate that a Contact is an Owner, Accountant, etc. for a Matter.

When you create a specified relationship between two records, choose a Relationship Code describing the relationship from the drop-down list.

To set up Relationship Codes, go to **File > Setup > Codes > Relationship Codes**. To add a new Code, click **Add** and enter a code of up to 4 characters and a description.

Multiparty Relationships

Suppose you have a single client with many Matters. You can set up the records to represent either a one-to-one relationship or a one-to-many relationship between Contacts and Matters.

In a **one-to-one relationship**, you create a copy of the client’s Contact record for each Matter, and enter a different Matter in the Matter Reference field on each Contact Form. The client will have multiple entries on the Contact list.



You can apply changes to multiple copies of a Contact by tagging them and selecting **Change Records** from the **Process** menu.



Make one Contact the primary record and give it a Classification Code such as “PRI”. Give other codes to the copies. Then you can filter the list to hide the duplicates.

In a **one-to-many relationship**, leave the Matter Reference field on the Contact form blank and use the Related tab on the Contact form to view the client’s Matters. (The Matters are automatically related to the Contact because they have that Contact in the Regarding field.) In this approach, the client appears only once on the Contact list.

Archived Records

Archiving a record moves it from the active list to the archive list. No data or record relationships are lost. Archiving completed ToDo records, past Event records, and closed or inactive Matter records reduces clutter and helps maintain ease of use.

Archive records by going to **Process > Archive** from inside the open Record.

Alternatively, you can tag records in a list and go to **Process > Archive** on the list toolbar. This is especially useful for archiving lists of records obtained through the results of a search.

You can also use the Batch Archive utility to archive date-dependent records (all records except for Contacts and Matters) with dates earlier than a date you specify. Go to **File > Utilities > Batch Archive**.

Searching for the Information You Need

Time Matters helps you find information quickly through several different search methods. You can search individual record lists or your entire database.

To search documents outside your database, see “Document Searches” on page 45.

List Searches

You can search the record list you currently have open using the Search box or using QuickPik.

Search Box

With default settings, each list toolbar includes a search box that lets you perform a simple text search of the record list. Type the text you want to find in the search box and then press ENTER.

The list will be filtered to display only records in which the search text was found. Cancel the filter by clicking the Search button on the toolbar.

Your most recent search terms for the current list are stored for reuse. Click the drop-down arrow beside the search box to select a search term that you entered previously.

QuickPik

Click on a list and start typing to move the highlight bar to the record that most closely matches what you are typing. You can type the full name of a record to go directly to that name.

The characters you type are displayed in a pop-up box when you start typing. These keys are cleared immediately by pressing the Up or Down cursor arrow keys. You can also use the backspace key to correct a typing error when using QuickPik.

QuickPik also has a time-out. A specified number of seconds after you stop typing, the previously typed keystrokes are cleared, allowing you to type another name to continue with another search.

Combined Search

A Combined Search lets you use multiple search criteria to locate records. For example, to see all the Clients assigned to a particular Staff member, search the Contact list for the Staff member and the “Client” Classification Code.

To open the Combined Search screen, open a record list and go to **Search > Combined Search** or press the hot key F2.

The Combined Search filters out records that do not match the field entries on the Search Criteria screen. Therefore, if you type RSB for Staff and Brown v. Brown for the Matter, only the records for Staff RSB and Matter Brown v. Brown are displayed on the result of the search.

Click the Search button on the list toolbar to cancel the search and remove the filter on the list.

Custom Search

Custom Search provides options similar to a Combined Search, except that you can save your search criteria as a Search Template for reuse later.

Global Search (Conflict of Interest)

Global Search performs a search of the entire Time Matters database, including all record fields and areas such as notes and memo areas. Narrow your search to include only selected lists. This search also includes the contents of external documents attached to Document records in the scope of the search (provided that Time Matters Document Files are in the search).

To Perform a Global Search

1. Select **Global Search** from the Search menu to begin.

The first screen in the search wizard gives you the option to use an existing search template (one previously created and saved), modify an existing template, or create a new template.

This example procedure is based on creating a new search template. Select **Create a new search template** and then click **Next**.

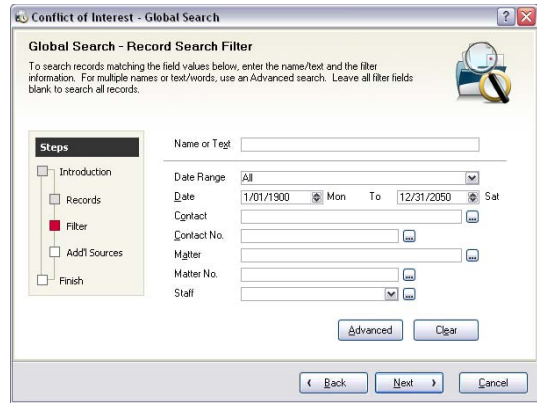
2. **Records to Search.** Specify the record types to search. You can select All Record Types, which includes Active and Archived records, or you can determine which records to search and if Archived records are included for the selected types. Select the check box beside a record type to include that record type in the search.

Click **Next** to continue.

3. **Record Search Filter.** This sets the scope of the search. The Dates, Matter and Contact, Staff, and Text Search Criteria Fields work the same as the Search Criteria fields for lists.

Note: Classification Code is not a search criterion since all record types have different Classification Codes, and a Code specification would search only one record type. A Classification Code Description, however, can be used as a Text search criterion.

To conduct a Conflict of Interest search, leave all fields blank and specify a date range with a long enough period to cover all records.



Filter Fields

Date Range	Pre-defined date ranges you can select instead of entering start and end dates.
Date From	The starting date for the Search. No records before this date are searched.
Date To	The ending date for the Search. No records after this date are searched.
Contact	The Contact to find. The Contact field must contain this entry.
Contact No.	The Contact Number to find. Entering a Contact Number automatically fills in the Contact field.
Matter	The Matter to find. Entering a Matter Reference automatically fills in the Matter Number field (if the selected Matter has a file number).
Matter No.	The Matter Number of the Matter to find. Entering a Matter Number automatically fills in the Matter field.
Staff	The Staff member to find.

In the **Name or Text** field, type the name or text to search for.

For Conflict of Interest Searches, the best approach is to find as many likely matches as possible for the Name or Text Search, then review the findings for possible Conflicts of Interest. It is better to err on the side of finding rather than missing a match.

For example, typing too few characters will produce too many matches: typing WIL will find names such as WILSON, WILLIAMS, etc. Typing too many characters, such as KATE B. WILSON, will cause you to miss KATE WILSON (no middle initial) or even KATE B WILSON (no period after the B).

Click **Next** to continue, or click the **Advanced** button to go to an optional screen with additional search options.

- 4. Advanced Search Options.** (Optional screen.) Options to enter multiple search terms and expand your search results are on this screen.

Enter Keywords—Terms you type in these fields are added to the main search term(s) entered on the previous screen. An implied OR connector follows each field. For example, if you typed "Smith" as the main search term on the previous screen, and you now type "John" and "Jane" on the first two fields of the Advanced screen, Global Search will look for records that have the word Smith and also either John or Jane.

Enable Natural Language—A natural language search request is any combination of words, phrases, or sentences. Search results are sorted by their relevance to your search request. Common words such as *if* and *the* are ignored.

Enable Stemming—Extends a search to cover variations of words. For example, a search for *fish* would also find *fishing*. A search for *applied* would also find *applying*, *applies*, and *apply*.

Enable Phonetic Searching—Finds words that sound like the search term and begin with the same letter. For example, a phonetic search for *Smith* also finds *Smithe* and *Smythe*.

Enable Fuzzy Search—Finds a word even if it is misspelled. For example, a fuzzy search for *apple* finds *apple*. This is useful when you are unsure of the spelling of a name you are searching for, or when searching text that might contain typographical errors. **Adjust Fuzziness** lets you control the level of the fuzzy search.

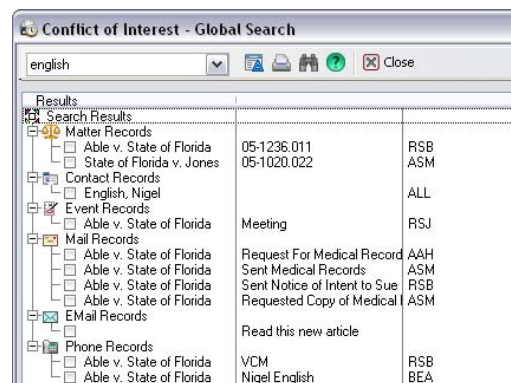
Click **Next** to continue.

- 5. Other Search Types.** Specify other search types to include. These options vary depending on features and links to external programs you have set up. Possible options include: Web, Outlook Folders, Document Files, and lexis.com. Each choice you include provides a screen to enter search criteria for that option. For example, Web provides a screen for you to choose from a list of Web Search sites you have configured.

Click **Next** to continue. If you selected additional search types, follow the wizard's instructions to configure each type, clicking **Next** to proceed.

- 6. Finish.** This screen lets you save the Search Template. To save the Template for later use, select **Yes** and provide a name.

Click the **Finish** button to perform the search.



The Global Search generates a list of records. Review the results to further determine if there is a match (or if a Conflict of Interest exists).

The list opens as each record type is searched for records matching the search criteria. For a closer look at a record to see the nature of the match or potential conflict, highlight the record and click the **View** button to open that record form.

The match with the search name or text may also be in the attached Notes or Custom Forms. Therefore, you may not see the name or text on the Form.

Managing Your Schedule

This chapter discusses basic Calendar functionality, including descriptions of the various Calendars and how to use them to manage your Events, ToDo's and other records. Calendaring-related features such as Alerts, Reminders, Watches and Journals are also described.

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Events and ToDo's

Events and ToDo's are the record types most often used for scheduling. Events and ToDo's are similar, but have important differences:

- **An Event has both a date and a time.** Event records are like appointments. They typically represent meetings, hearings, trials, and other events that occur at a particular time of day.
- **A ToDo has a date but no time.** ToDo records are like tasks. They must be completed on or by a date, but not at a particular time on that date. These might include writing a letter, doing research, or filing documents.

Calendar Overview

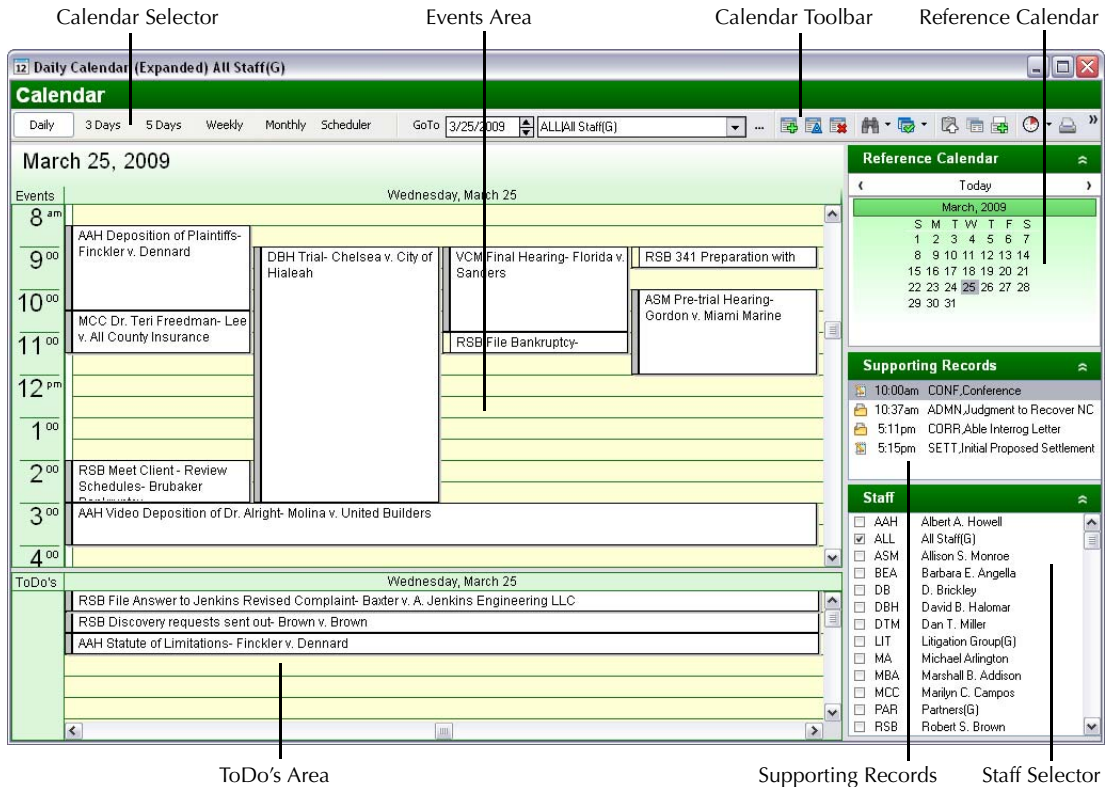
Your Calendar provides the most convenient place to manage Events and ToDo's. The Calendar can show you the Events and ToDo's that you have scheduled for a single day, or you can view several days, a week, or a month at a time.

To open the Calendar, click the down arrow on the **Calendars** toolbar button and select the calendar view you want: **Daily**, **Weekly** or **Monthly**. Alternatively, you can click **Calendar** on the main program menu and select the calendar view you want to open.

The **Daily Calendar** gives you a close-up view of your schedule, with Events shown in the top area of the Calendar and ToDo's in the bottom area.

By default, the Daily Calendar shows half-hour time intervals. An Event's duration is represented visually by the number of time intervals it spans. A vertical bar on the left side of the Event box shows the exact duration of the Event if it does not take up a whole number of time intervals, such as an Event scheduled for 45 minutes.

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The **Multi-Day Calendar** shows several Daily Calendar views side by side. (Note that viewing seven days on the Multi-Day Calendar is not the same as viewing the Weekly Calendar!)

The **Weekly Calendar** shows your schedule for an entire week, from Monday to Sunday. Instead of dividing Events and ToDo's into different areas, this view shows both types of records in a combined list for each day.

The **Monthly Calendar** displays an entire month of your schedule, with both Events and ToDo's listed together on each day. You can "zoom in" on a date on the Monthly Calendar by double-clicking that date. This presents an expanded list of the records for that day.

Adding Items to the Calendar

On the Daily Calendar, double-click a specific time in the Events area to add an Event that begins at that time, or double-click the ToDo's area to add a ToDo for the date currently displayed.

On other Calendars, click the desired date and then click the **Add** button on the Calendar toolbar to create a new item on your schedule.

On the Weekly and Monthly calendars, you will be asked whether you want to add an Event or a ToDo when you click the desired date and then click the **Add** button.

The Event or ToDo record form opens. Enter the information you need and click **Save & Close**. Some form fields will be pre-completed on the form based on information from the Calendar:

- The **Date** field will show the date you selected on the Calendar.

- The **Time** field (Events only) will show the time you selected on the Daily Calendar.
- The **Staff** field will show the Staff member(s) displayed on the Calendar.

Quick Entry

You can also use the Quick Entry feature to create Events with minimal information, such as a reminder to place a call or meet someone for lunch. To create an Event using Quick Entry, simply click a time slot on the Daily Calendar and begin typing a short description of the Event. The Quick Entry form will open as you type. This form has a **Description** field, a **Classification Code** field and a **Memo** field. Complete these fields as needed and click **OK** to create the Event.

On the Daily Calendar, you can drag and drop Events to change their time slots and durations.

- To change an Event's time, place the cursor over the bar on the left edge of the Event, click and hold the mouse button, and drag the Event to the desired time slot.
- To change an Event's duration, place the cursor over the lower edge of the Event, click and hold the mouse button, and drag the edge to the desired end time for the Event.

Viewing Calendars for Multiple Staff

Time Matters lets you view not only your own calendar, but the calendars of other Staff members in real time. On the Calendar toolbar, click the drop-down arrow beside the **Staff** field and select the Staff whose calendar you want to view. Event and ToDo records assigned to that Staff member will be displayed on the Calendar.

You can also display multiple Staff on the Calendar simultaneously. Click the Lookup button beside the **Staff** field to open a new window in which you can select multiple Staff to view.

Another way to view the calendars of multiple Staff is to select a Staff Group in the **Staff** field. Staff Groups are predefined lists of Staff with common traits, such as "Partners". With a Staff Group selected, click the **Expanded Groups** button on the Calendar toolbar to view Events and ToDo's for every individual member of the Staff Group.

If your firm has assigned Staff colors, you can set the bar to the left of each Event and ToDo on the Calendar to display show the color of the Staff assigned to that record.

The Scheduler

When you need to check the availability of Staff for an Event, use the Scheduler.

To open the Scheduler, click **Calendar** on the main program menu and select **Scheduler**.

The Scheduler displays a row for each selected Staff member, making it easy to compare their scheduled and available time. Use the Staff Selector or the Lookup button beside the **Staff** field to select multiple Staff members for display.

To select a date to display, click a day on the Reference Calendar or type a date in the **GoTo** field and press the TAB key.

To see the details of what is scheduled for a Staff member on a given day, double-click anywhere in that Staff member's row. A window opens, displaying that person's schedule for the day.

Note: Events with no duration display with a shallow bar.

Alerts, Reminders, Watches

Alerts, Reminders, and Watches bring time-critical activities to the attention of users and Staff.

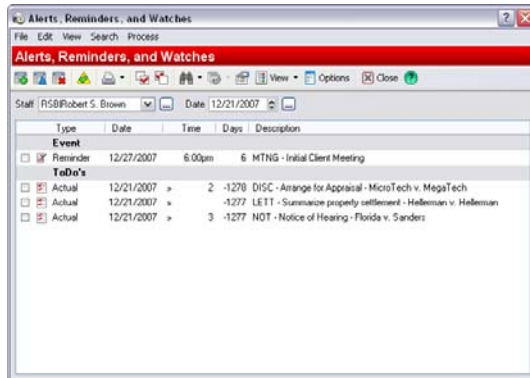
- **Alerts** inform Staff members when important items are placed on their calendars or entered on record forms assigned to them.
- **Reminders** display on user-specified days in advance of a record's scheduled or due date.

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- **Watches** inform you when a Contact or Matter has been inactive for a long period of time.

All three types of notification display on the Alerts, Reminders, and Watches screen.

To View Alerts, Reminders, and Watches, go to **Calendar > Alerts, Reminders and Watches**.



The Alerts, Reminders, and Watches screen opens showing the default Staff or Group assigned to you or set on the Program Login screen. The Date is today's date or the date set on the Program Login screen. The date in this field is called the Check Date—the date against which the program checks records to see if they should be displayed on the Alerts, Reminders, and Watches screen.

In addition to Alerts, Reminders, and Watches, the screen also shows “Actual” items—dated records whose scheduled or due date has arrived.

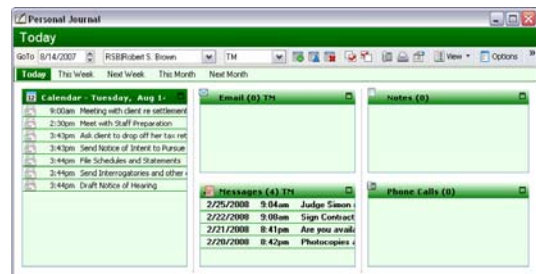
For more information on Alerts, Reminders and Watches, refer to the online Help.

Journals

The Personal Journal provides access to records that fall within a narrow date range and that are linked to a Staff member and/or user. The Personal Journal presents a broad range of Time Matters information at one time, with a focus on the immediate or short-term needs of the user.

There are also Contact Journals and Matter Journals, which function similarly. These journals focus on work done for a particular Contact or Matter instead of work assigned to a particular Staff member or user.

- To open the Personal Journal, go to **Calendar > Personal Journal**.
- To open the Contact Journal, go to **Calendar > Contact Journal**.
- To open the Matter Journal, go to **Calendar > Matter Journal**.



Adding, changing, and deleting records from the Journal is the same as adding, changing, and deleting records from Calendars, main Record lists, or Supporting Record lists. You can also mark records as Done or Not Done by right-clicking a selected record within the view panes.

When the Journal is open, each review area can be enlarged for easier viewing by clicking the box in the upper right corner of that area. Within the review areas, users may drag and drop records within a particular data area to establish Specified Relationships.

Document Management

Document Management provides a framework within which you can systematically organize and manage electronic documents created by word processors, spreadsheets, scanned images, and other applications.

Time Matters makes it easy to work with documents created within the application or by outside applications such as your word processor. You can associate document files with Time Matters records, perform document version control, and save files directly to Time Matters from your word processor.

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Overview of Documents

A Document record is not an actual document file, but a database entry that is associated with a document file and contains information about the file. The Document record lets you relate Contacts and Matters to the document, track multiple document versions, and perform other management functions.

A Document record can be associated with a variety of types of actual files. Supported file types include the following:

- Word processor files (.DOC or .WPD)
- Spreadsheets (.XLS or .WK1)
- Scanned images (.TIF)
- Internet files (.HTM)
- Acrobat Portable Document Files (.PDF)
- Sound files (.WAV)
- Video files (.AVI)
- Microsoft Office Binder files (.OBD)

Document List

All your Document records are displayed on the main Document list. Records are added to this list whenever a new document is created.

To Open the Document List

- On the **Database** menu, select **Document List > All Documents**
- Click the **Docs** button on the main toolbar
- Press Hot Key **F9**

Use the list toolbar above the list of documents to add, view/change, or delete documents, to search, tag, and process records, and to print and set the Properties for Document records.



You can also view Documents related to a specific client. On the client's Contact or Matter file, select the Documents tab.

Document Sublists

Document sublists provide a convenient way to work with all the documents for a particular Client or Matter. On an open record form such as a Contact or Matter, click the Documents form tab to view a list of all the Document records related to the Contact, Matter or other record you have open.

You can perform the same tasks on Document records in the sublist as on records on the main Document list.

Document Folders

From the main Document list or from a Document sublist, you can open the folder a Document is stored in. To do so, do the following:

- Right-click the Document record in the list or sublist and click **Open Containing Folder**.

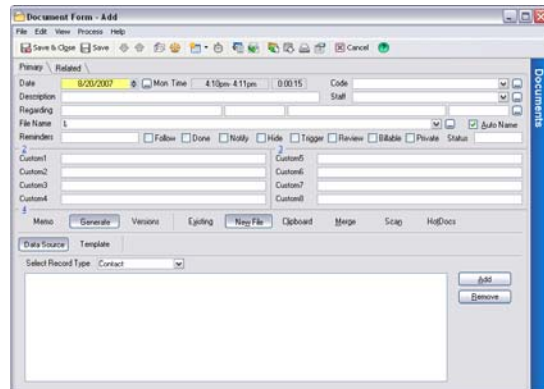
Document Form

To Open the Document Form

- Go to **File > New Record > Document**.
- Click the **Add** button on the Document list.
- Press the Hot Key **CTRL+SHIFT+D**.



If you open a new Document form from within another record such as a Contact, some Document form fields will be pre-filled with data from the originating record.



The top area of the form is similar to other record types: there are fields for Date and Time, Classification Code, Description, Staff, and the Regarding line.

Unique to the Document form is the **File Name** field. This field displays the name and location of the file associated with the Document record.

Ampersand notation is supported, which means that the ampersand character (&) substitutes for the path of the Time Matters Files Directory.

The **AutoName** check box beside the **File Name** field ensures that newly created documents are named and saved in folders according to a formula you specify.

For example, a formula could automatically insert the date and the Client's name in the name of the file, and place the Document in subfolders named for the Client and Matter.

To Define an AutoName Formula

1. Go to **File > Setup > General > Program Level > Forms** tab.
2. Select **Documents** as the Form type and click the **Set Form Options** button.
3. On the Program Form Settings screen, select **AutoName Checked by Default** and click the **Advanced** button.
4. On the Document AutoName Options screen, select elements from the drop-down lists to define naming formulas for Document subfolders and file names.

Most of these elements are variables (such as "Client"), whose values are drawn from fields on the Document form. Other available elements include the date, time, and special characters.

The bottom area of the form changes appearance based on your selection of one of three buttons: **Memo**, **Generate**, and **Versions**.

Click **Memo** to display the standard Memo field that appears on most record forms.

Click **Generate** to create a new document or to relate an existing file to the Document record.

Click **Versions** to view a history of document versions or to revert to a previous version.

Associating an Existing File with the Document Record

When you complete the **File Name** field, you can specify an existing file to associate with the record. You can type the path and file name into the field, or click the Lookup button to browse for the file.

Viewing the File Associated with the Document Record

To view the file associated with the Document record, click the **Existing** button and then click the **GoTo** button that appears below the **File Information** area. The file will open in its native application.

Ampersand Notation

To avoid having to specify long directory paths in the **File Name** field of a Document form, you can type the ampersand symbol (&) in place of a portion of the path. The ampersand substitutes for the application's Files directory.

The Files directory is where files are stored if you want them to be physically located under the main application directory.

One advantage to this approach is that if the Files Directory location ever changes, the change will automatically apply to Document records that use the "&" character in their path.

You can specify the location of your Files directory on the Set File Locations screen.

To Open the Set File Locations Screen

1. Go to **File > Utilities > File Locations**.
2. Select a File Locations File to modify and click the **Edit** button, or click the **Add** button to create a new File Locations File.

The Set File Locations screen opens.

Creating New Documents

There are many ways to create new documents from the Document Form, including:

- Using a Document Template
- Using the Formattable Clipboard
- Using a Merge Template
- Using a Scan
- Using HotDocs

Procedures for each of these methods are given in the following sections.

Document Templates

Templates are blank files or documents from which a new file or document inherits default settings. For example, in a word processing document, the template sets the fonts, style, page type and layout, and can even contain auto-run macros. Templates can be anything from blank documents that have your letterhead and formatting preferences to spreadsheets that contain all the formulas for special reports.

To be available for use in the Document form, templates must meet two criteria:

- They must reside in the sub-directory named "Template" that is found in the Files Directory specified in the application's File Locations settings.
- The file extension must be associated with an application installed on your computer. For example, if a template is named BLANK.DOC, then .doc must be assigned to an application, usually Microsoft Word.

To Create a New Document Using a Document Template

1. Open a new Document form and complete the fields in the top area.
2. In the bottom area of the form, click the **Generate** button and the **New File** button.
3. Do the following to select a record to use as a data source for the new document:
 - a. Click the **Data Source** button.
 - b. Select a record type from the **Select Record Type** drop-down list.
 - c. Click the **Add** button and tag one or more records in the list that opens. Then click **OK**.
4. Click the **Template** button. Select a document template from the list of available templates.
5. Review the Document form to make sure that the **File Name** field contains a path and file name. Then click the **Create** button.

The application associated with the template opens. The template is copied into a new file.

6. Save the file and close or minimize the other application to return to Time Matters.
-

Formattable Clipboard

The Formattable Clipboard tells Time Matters which fields to copy to the Windows Clipboard when you use the Copy function. You can create clipboard formats that copy different sets of data fields.

This saves you the trouble of copying text out of individual fields one at a time, such as separate address lines. Instead, just select the clipboard format that corresponds to the fields you need.

Using special codes and pre-entered text, a clipboard format can even produce complete documents. For example, different paragraphs can be used depending on whether a Contact is from one state or another state.

To Create a New Document Using the Formattable Clipboard

1. Open a new Document form and complete the fields in the top area.
 2. In the bottom area of the form, click the **Generate** button and the **Clipboard** button.
 3. Do the following to select a record from which to copy data to the Clipboard:
 - a. Click the **Data Source** button.
 - b. Select a record type from the **Select Record Type** drop-down list.
 - c. Click the **Add** button and select a record. Then click **OK**.
 4. Click the **Template** button. Two panels display. The left panel lists the document templates found in the application's Templates directory. The right window displays the clipboard formats defined for the record type you selected under Data Source.

For example, if you select Contact as the record type under Data Source, then only clipboard formats for Contacts are displayed.
 5. Select a document template and a clipboard format to use to create the document.
 6. Review the Document form to make sure that the **File Name** field contains a path and file name. Then click **Create**.

The application associated with your Template opens. Your Template is copied into the new file.
 7. Paste in the information that was copied to your Windows Clipboard by the Formattable Clipboard procedure. In most Windows programs this is done by pressing CTRL+V or from **Edit > Paste**.
 8. Save the file and close or minimize the other application to return to Time Matters.
-

Merge Templates

Document generation using Merge is similar to the Formattable Clipboard. A template containing the standard document is set up containing fields that are completed when the procedure is run. The main difference is that this form is set up in your word processor rather than in Time Matters. You select one or more records, select the template, and your word processor starts and creates a file completed with data from the selected records.

Merges have two parts:

- The standard document to be duplicated, called the Form document. The Form document is created by your word processor.
- The source of names and information to be merged into the standard document, called the Data document. The Data document is created in Time Matters.

To Create a New Document Using a Merge Template

1. Open a new Document form and complete the fields in the top area.
2. In the bottom area of the form, click the **Generate** button and the **Merge** button.
3. Do the following to select a record from which to copy data to the Clipboard:
 - a. Click the **Data Source** button.
 - b. Select a record type from the **Select Record Type** drop-down list.
 - c. Click the **Add** button and select the records to be used in the merge. Then click **OK**.
4. Click the **Template** button and then select the merge template to use.
5. Review the Document form to make sure that the **File Name** field contains a path and file name. Then click **Merge**.

Your word processor opens and the document is created.

Scanning Documents

In addition to attaching an existing scanned file to the Document record, you can bring a scanned file from the scanner directly into Time Matters using a TWAIN driver.



You can also use PaperPort Deluxe to bring scanned files into Time Matters. See the online Help for details.

To Create a New Document Using a Scan

1. Open a new Document form and complete the fields in the top area.
 2. In the bottom area of the form, click the **Generate** button and the **Scan** button.
 3. Click the **Template** button.
 4. Click **Select Source** to choose a scanner.
 5. On the **Save As** drop-down list, select the type of file to be saved.
 6. Review the Document form to make sure that Area 1 contains a path and file name. Click **Scan Document**.
-

HotDocs

The HotDocs link automatically creates HotDocs Answer Files, completing HotDocs prompts with information from data fields in your Time Matters records.

Your own Answer Files and HotDocs administrative prompts can be referenced. The HotDocs generated document is automatically listed under the Contact or Matter, and is immediately available for reference.

To Create a New Document Using HotDocs

Create documents using HotDocs Templates.

1. Open a new Document form and complete the fields in the top area.
2. In the bottom area of the form, select the **Generate** button and the **HotDocs** button.
3. If the new Document is not already associated with another record, do the following:
 - a. Click the **Data Source** button.
 - b. Select a record type from the **Select Record Type** drop-down list.
 - c. Click the **Add** button and select one or more records. Then click **OK**.
4. Select the **Template** button and then select the HotDocs merge template to be used.
5. Review the Document form to make sure that Area 1 contains a path and file name. Click **Assemble**.

The document is created automatically within your word processor.

Document Versions

Document versioning provides a convenient way to maintain a history of changes to a document. A single Document record is associated with all the versions of the document.



Each document version is a separate file that requires space on the hard drive.

To View a Version of a Document

1. Open a Document record.
2. Click the **Versions** button and select a version.
 - Click the **GoTo** button to open the document version in its associated application.
 - Click the **View** button to open the document in the File Viewer, where you can view it but not edit it.

To Create a New Version of a Document

1. Open a Document record.
2. Click the **Existing** button. Click **New Version**.
3. The document opens in its associated program. Make your edits, then save and close the file.
4. Click the **Versions** button on the Document record.

The current version is listed in the **File Name** field. The previous version is in the Versions list.

To Revert to an Old Version of a Document

1. Open a Document record. Click the **Versions** button.
2. In the Version list, select the version to which you will be reverting.
3. Click **Revert**.

The file that had been current is not lost. It is in the Versions list as the last version created.

Version Control

Document version control prevents documents from being modified by more than one person at the same time by allowing you to check out documents, work on them and then check them back in.

Checking out a document marks the Document Profile record as checked out and optionally adds a read-only attribute to the file on disk. This prevents others from changing the document while it is checked out. Time Matters alerts users that the document is checked out and shows which user checked it out. The document remains available for viewing and printing.

Checking Documents in and out must be done from the main Document list or from a Document sublist.

To Check Out Documents

1. Open the Document list or sub-list.
2. Tag one or more Document records. On the toolbar, click the down arrow beside the **Process** button and then click **Check Out Documents**. The Check Out Document or File screen opens.
3. Complete the checkout options. The following options are available:
 - **Set Document/File Properties to Read-Only in Windows**—Prevents editing of the document in most applications.
 - **Checkout Document/File only - Do Not Copy to a Specified Location**—Marks the Document Profile record as checked out. Use this option if you have already copied the file to the location where it is to be edited.
 - **Checkout Document/File Only AND Copy to a Specified Location**—Marks the Document Profile record as checked out and copies it to the location you specify.
4. Click **OK**. The Document and File Checkout Confirmation screen opens.
5. Review the items in the list (including exceptions on the Exceptions tab) and click **OK**.

To Check In Documents

1. Open the Document list.
 2. Tag one or more Document records. On the toolbar, click the down arrow beside the **Process** button and then click **Check In Documents**. The Check In Document or File screen opens.
 3. Complete the checkin options. The following options are available:
 - **Remove Document/File Read-Only Property in Windows**—Remove the read-only file attribute and restore editing.
 - **Check In as a New Version of this Document/File**—Creates a new current version of the document. The previous version appears in the Versions list.
 - **Check in Document/File only - Do Not Copy from a Specified Location**—Marks the Document Profile record as checked in. Use this option if you have already copied the file back to the location from which it was checked out.
 - **Check in Document/File Only AND Copy from a Specified Location**—Marks the Document Profile record as checked in and copies it from the location you specify.
 4. Click **Check in**. The Checkin Confirmation screen opens.
 5. Review the items in the list (including exceptions on the Exceptions tab) and click **OK**.
-

Importing Documents

You can bring existing files into Time Matters and associate them with Document records. Several methods are available to do this.

Using the Document Form

When you open a new Document form, you can specify the name and location of an existing file in the **File Name** field. Complete the rest of the record form and save the record.

Using Drag and Drop

Open Windows Explorer and Time Matters, and tile the windows so that both programs are visible. Select one or more files in Windows Explorer and drag them onto the Time Matters window.

Dropping a single file onto the Document List creates a new Document record for that file.

Dropping multiple files onto the Document List lets you specify information common to all the records you are about to create, such as the Code or Staff.

Dropping files onto a Contact, Matter, Event or ToDo creates Document records that are automatically related to the target record. Certain fields on the Document form will be pre-completed with information from the target record.

Using TM Save

Click the TM Save button on the toolbar of your word processor or other application to open a Time Matters Document form.

Using “Send to Front Office - Time Matters”

In Windows Explorer, right-click a document file and select **Send To > Front Office - Time Matters 10.0** from the pop-up menu. A screen opens, prompting you to create a profile for the Document record you are about to create. Complete the form and click **OK**.

Using a Custom Import

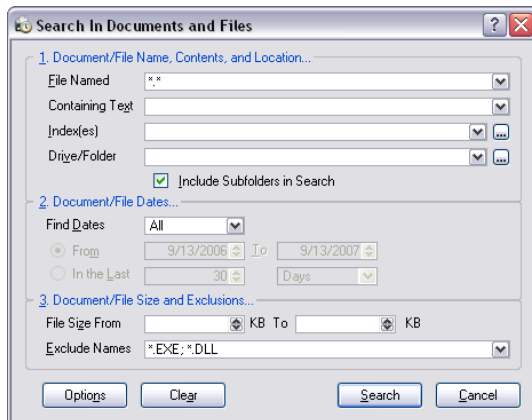
Go to **File > Import/Export > Import Records > Custom Import**. Create a new Import template and select Documents as the record type. Specify the directory where the documents you are importing reside. Enter information common to all the files you are importing, such as Code or Staff.

Document Searches

The Document Search feature lets you search for Document records with specific properties as well as for specific text within document files.

To Start a Document Search:

- On the main menu of the application, go to **Search > Document Search**. The Search in Documents and Files screen opens.



Enter your search criteria and click the **Search** button. A list of search results will appear on the Document Search screen.

Search Types

You can use the Search in Documents and Files screen to conduct several kinds of searches.

File Find

Finds all files meeting the search criteria without searching within the files. Looks at the name of the file only. To use this search, leave blank the **Containing Text** field of the search screen.

Full Text Search

Searches each file meeting the Search Criteria. This lets you search documents that are not indexed. To use this search, type text to search for in the **Containing Text** field.

This search is not case sensitive, and common words such as “and”, “to”, and “the” are ignored. The text can be a word, a phrase, or words linked by connectors such as AND and OR to indicate the relationship between them. Use parenthetic expressions to set the exact search criteria. For example, apple AND orange AND pear is different from apple AND (orange AND pear).

See the examples in the following table:

Search Criteria	Search Result
apple AND pear	both words must be present
apple AND NOT pear	apple must be present, pear must not be present
apple OR pear	either word can be present
apple w/ 5 pear	apple must occur within 5 words of pear
apple NOT w/ 5 pear	apple must not occur within 5 words of pear
apple w/ 5 xfirstword	apple must occur within the first 5 words
apple w/ 5 xlastword	apple must occur in the last 5 words

Indexed Search

Searches an index rather than searching each file. Using an index, search time can be less than a few seconds, even if searching thousands of documents. To use this search select an index from the drop-down list in the **Indexes** field.

Use the Document Index Manager to create and configure your document indexes. This utility is available by going to **File > Utilities > Document Management > Document Index Manager**.

Combination Search

Specify one or more indexes and folders to search on the Search in Documents and Files screen.

Additional Search Options

Additional search options are available by clicking the **Options** button at the bottom of the Search In Documents and Files screen.

Enable Natural Language—A natural language search is a combination of words, phrases, or sentences. After a natural language search, retrieved documents are sorted by their relevance to your search request. Common words, such as “if” and “the”, are considered noise words and are ignored in searches.

Enable Stemming—Stemming extends a search to cover variations of a word. For example, a search for “fish” also finds “fishy”, “fished”, and “fishing”. A search for “applied” also finds “apply”, “applies”, and “applying”.

Enable Phonetic Searching—Phonetic searching looks for words that sound similar to the word you are searching for, and that begin with the same letter. For example, a phonetic search for “Smith” will also find “Smithe” and “Smythe”.

Enable Fuzzy Search—Fuzzy searching finds a word even if it is misspelled. For example, a fuzzy search for “apple” finds “appple”. Fuzzy searching is helpful when searching text that may contain typographical errors or when searching for a name whose spelling you are unsure of. Adjust Fuzziness allows you to control the level of the fuzzy search.

Using the Document Search List

After a search is complete, the files meeting the search criteria display in the Document Search list.

From the Document Search list you can:

- Add a Document record for a file.
- Change or delete Document records for a corresponding file. The number of records displays in the TM Records column. If more than one document profile exists, you must open the records using the Document list to edit them.
- Determine a document’s search relevance by the number of occurrences in the Hits column.
- Highlight a document to preview its contents. You can zoom the Preview pane view and use it to copy text.
- Open or print a document (if you have software associated with the document type).
- Tag and Process any or all the documents found.

Saving Searches

Searches can be saved by: 1) saving the search criteria so you can perform a similar search later, or by 2) saving current search results as a tag list.

To Save Search Criteria

1. Conduct a search. After the search completes, select **Saved Searches** from the Search menu. The Saved Document Search Criteria screen opens.
 2. Click **Add** to save the current search, or select a saved search in the list and click **Change** to replace it with the current search criteria.
-

To Save Results to a Tag List

1. Conduct a search, then tag the required records.
 2. Select **Saved Tags** from the Process menu. The Saved Tag Records List opens.
 3. Click **Add** to save the tagged records to a new Tag List, or highlight a Tag List in the list and click **Change** to replace it with the current tagged records or to append the new tags to the list.
-

Communications

Time Matters helps you effectively organize all communications, including phone calls, emails, faxes, mail, and instant messaging, in a simple to use interface.

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Messenger

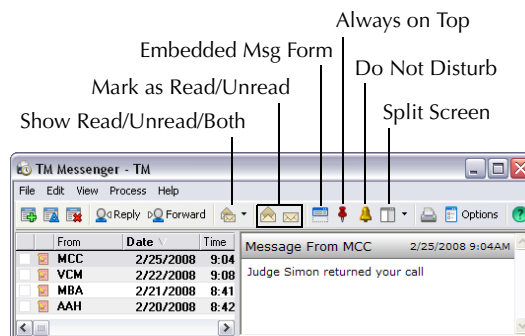
The integrated instant messaging system is referred to as the Messenger. The Messenger allows communication between all application users who are accessing the same database. It is normally used to send short, informal messages.

You can create a record from an existing message and populate the message text into the memo area of the record being created. You can also include embedded records in messages you reply to or forward.

The Messenger is a separate application. It can run while Time Matters is not open.

To open the Messenger window, go to **View > Messenger Window** or press the hot key CTRL+M.

An icon () appears in the Windows system tray.

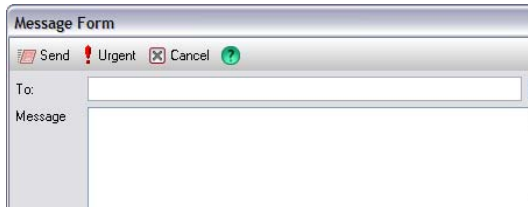


On the Communications tab of User Level Setup, you can set the Messenger to open automatically when the application starts, as well as configure other options such as making the Messenger icon flash when a new message is received.

Note: After changing Messenger settings in User Level Setup, you must close and restart the application before the changes will take effect.

Sending and Receiving Messages

To create a new message, click the **Add** button in the Messenger window, or press the hot key CTRL+SHIFT+M from anywhere in the application. The Message Form opens.



Enter a user (not a Staff) or a user group in the **To** field, type your message in the **Message** field, and click **Send**. Select **Urgent** to flag the message as important or time-sensitive. A message flagged as Urgent can bypass some Do Not Disturb settings.

Received messages will stay on your message list until they are deleted. You should delete messages regularly as normal maintenance of the Messenger.

Although the Messenger is not designed for long term storage of information, you can archive important messages for later viewing.

To archive a message, tag the message and go to **Process > Archive Records**.

To show or hide archived messages, go to **View > Show Archived Records** on the Messenger.

Using Do Not Disturb

“Do Not Disturb” prevents the Messenger window from automatically opening when a new message is received. If **Do Not Disturb Unless Urgent** is selected, only Urgent messages will cause the Messenger window to open.

To select a Do Not Disturb setting, right-click the Messenger icon in the Windows system tray and choose the setting you want from the pop-up menu. You can also turn Do Not Disturb on and off using the Do Not Disturb toolbar button on the Messenger window.

Email

The email system is capable of sending and receiving the following email types:

- Time Matters email
- MAPI compliant email
- (2) IMAP Compliant Email. World Server supports IMAP4.
- Internet email (POP)

Time Matters Email is used to send email between users sharing a common Time Matters database.

Personal Inbox

The Personal Inbox is an email client for the current user. All types of email are collected and managed in the Personal Inbox.

To open the Personal Inbox, go to **Mail > Personal Inbox** or press the hot key CTRL+I.

An email in your Inbox will not necessarily appear as a record on the Email list. You must specify the Email records you want to save and those you want to delete from the Inbox.



Make a habit of regularly clearing out your Inbox . Save to the Email list the emails you want to keep, and delete the others.

When you compose a new email or open one in your Inbox, you can save it as an Email record by selecting the **Show on Email List** check box and clicking **Save & Close**. If you also want the email to appear in the Personal Inbox, you can select the **Show in Inbox** check box. For emails you are composing, this places a copy in the Sent folder of the Inbox when you click **Send**, or in the Drafts folder if you save the email without sending it.

You can also tag one or more emails in your Inbox that pertain to a specific Contact or Matter, go to **Process > Set Regarding**, specify the Contact or Matter to insert in the **Regarding** field, and save them as Email records.

Associating Email with Contacts and Matters

As you open email in your Inbox, the application tries to match the sender's address with email addresses in Contact and Matter records in the database. When a match is found, that Contact or Matter is inserted automatically in the **Regarding** field of the Email form. If there are multiple matches, you are prompted to select the best matching record from a list.

If no match is found, you can create a new Contact record for the sender by pressing the hot key CTRL+SHIFT+C while the Email form is open. A Contact form opens with the email address automatically inserted.

Some emails require you to act on the information they contain. You can create a new Event or ToDo from an open email by pressing CTRL+SHIFT+V for an Event, or CTRL +SHIFT+T for a ToDo. The email's subject is filled into the **Description** field of the new record form, and the email's body is filled into the **Memo** area of the record form.

Email List and Form

The Email list displays records of incoming and outgoing email. Three types of email are displayed – Time Matters, MAPI, and Internet.

To open the Email list, go to **Mail > Email List > All Email**, or press the hot key F11.

To open a new Email record, click **Add** on the Email list, or click **New** on the Personal Inbox, or press the hot key CTRL+SHIFT+E.

Regarding Fields—Links the Email record to the selected Client and/or Matter record.

From Field—specifies the account from which the Email is sent (if there are multiple Email accounts).

To Field—The Email recipient. Click the Lookup button to choose recipients from lists of Users, Contacts, and Distribution Lists. Select a recipient and click the appropriate button to add it to the To list, the Carbon Copy list, or the Blind Copy list.

Managing Email Attachments

Open an email, or create a new one, and click the **Attachments** button on the lower toolbar to view a list of attachments and buttons to add, open or remove them.

If you have a Document record for a file you want to send as an email attachment, you can right-click the record in the Documents list and select **Email Document**. An Email form opens with Regarding information (if any) already completed and the Document record attached. To attach multiple Documents at one time, tag them and go to **Process > Send Email**.

Click the **Remove** button to remove attachments from Email records when the attachments are no longer required. This greatly reduces the storage space required for the Inbox. You can search for attachments in a certain size or date range by going to **File > Utilities > Manage Email Attachments**.

Tag, Process, Send Email

You can tag multiple Contact or Matter records and designate them as the recipients of email you want to send using the **Process** menu.

To Send Email from Contact or Matter Lists

1. On the Contact or Matter list, tag all the records whose primary email addresses you want to use as recipients.
 2. Go to **Process > Send Email**.
 3. Select **Individual Emails** to send a separate email to each recipient, or select **One Email** to send a single email with all the recipients in the **To** field. Click **OK**. A new Email form opens.
 4. Compose the message and click **Send** to send it.
-

Spam

You can set up rules and actions to control unwanted email (“spam”) sent to you. When spam rules are set up, your Personal Inbox will display a Spam folder with several sub-folders into which you can direct email recognized as unwanted or dangerous.

The spam blocker is a multi-layered system of rules and actions that can be applied at either the Program Level or the User Level. Security settings can be used to control which users can set up their own spam rules.

To enable spam blocking at the Program Level, go to **File > Setup > General > Program Level**. On the General tab, click **Spam Options** to set up Program Level spam rules. Optionally, select the check box to allow users to set up their own spam rules.

To configure spam options at the User Level, go to **File > Setup > General > User Level**. On the Communications tab, click **Advanced Options**. On the Email Options screen, click the Spam tab, select the **Activate Spam Rules** check box, and click **Set Up Spam Rules**.

On the Spam Rules screen, you can set up spam rules based on the content or header of incoming email. Select the appropriate subtab and click Add to create a new spam rule.

Click the Actions tab and select actions to take for different levels of spam. You can also set restrictions on viewing email or attachments recognized as spam.



If your spam rules are too restrictive, there is a risk that Emails you need will be blocked. Spam rules work best when implemented over time, rather than trying to block all spam at the first attempt.

Phone Calls

The phone call management system can:

- Help you complete Phone Call record forms as calls are made or received
- Send notification to users when they receive incoming calls
- Automatically dial a phone number in a record form.

Phone Call List and Form

To open the Phone Call list, go to **Database > Phone Call List > All Phone Calls** or press the hot key F8.

To open a new Phone Call record, click **Add** on the Phone Call list or press the hot key CTRL+SHIFT+P.

The Phone Call form tracks information about outgoing or incoming phone calls. Click the **In From** button to toggle the field label between “In From” and “Out To”, depending on whether the call is incoming or outgoing. Other fields also change as you toggle the button.

When recording a phone call for another user, that user can be notified of the call in several ways. Select the **Notify** check box, and in the Notify area select the notification method you want to use.

Select the **Msg** check box to use the Messenger to immediately notify the user of a call. Select **Email** to send an email to a user or to a specified email address. Select **Alert** to place the Phone Call record on the Alerts, Reminders, and Watches screen.

Incoming Phone Call Processing

On the Phone tab of User Level Setup, you can enable Incoming Call Processing. This feature identifies callers and opens their associated Contact or Matter records.

If no exact match is found or if more than one record with an identical phone number is found, the Incoming Call screen opens, allowing you to select a record matching the caller or cancel processing for this call.

The Dialer

If you have set up your modem or network phone system to work with Time Matters, you can use the Dialer to automatically dial the numbers that appear in Phone Number fields.

Click the Dialer button beside a Phone Number field in any record form to open the Dialer with that number displayed and ready to dial.

You can also highlight a record in a list and press CTRL+D to open the Dialer and select a phone number from those found in the record.

On the Dialer screen, you can:

- Select a phone number from the drop-down list of all phone numbers found in the record.
- Click **Dial** to dial the number displayed.
- Click **Timer** to open the Timer window.
- Select **Open Phone Call** or **Open Note** to open a record of that type when you click the **Dial** button. You can also select **Start Timer** to open the new record with the timer running.

Mail

Mail records keep track of items sent or received, such as letters or packages, via couriers, postal service, FedEx, UPS, Airborne, etc. The cost of the delivery, the date sent or received, the weight of the package, and other information about the package can also be entered.

Mail List and Form

To open the Mail list, go to **Mail > Mail List > All Mail**.

To open a new Mail record, click **Add** on the Mail list or press the hot key CTRL+SHIFT+L.

In Area 2 of the form, click the **To** button to toggle the field label between To and From depending on whether the mail is outgoing or incoming.

You can select the Notify check box and use options in the Notify area to inform a user that a Mail item was sent or received.

In/Out List

The In/Out list shows which users are listed as in or out of the office, as well as their expected return date and time and other comments.

To show the In/Out list, go to **View > In / Out List**.

To mark a user as in or out, simply click the **In** or **Out** column beside that user in the list.

Alternatively, you can right-click a user and select **Mark In** or **Mark Out**, or select **Edit Status** to enter a return date/time and a comment.

You can also tag multiple users and change their status using options on the **Process** menu.

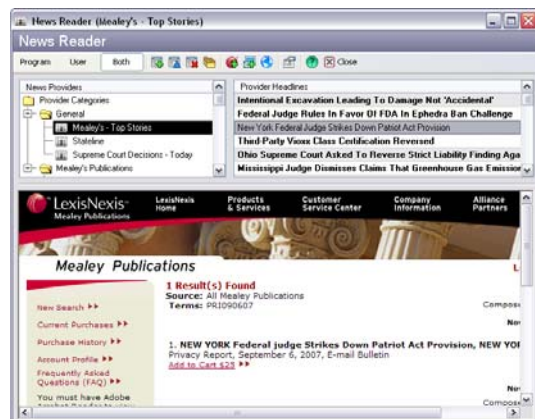
Click the **Options** button on the In/Out list toolbar to set up automatic In/Out list status changes when you log in or log out of the application.

News Reader

The News Reader displays RSS (Really Simple Syndication) format news articles. From the News Reader main screen, you can create a Web record from an article, send Email containing a link to the article, or view the article in your Web browser.

To Open the News Reader

- Go to **View > News Reader**.



Online Research

Time Matters lets you save and manage the legal research you perform online. You can associate the results of your research with Clients and Matters in your database, and you can conduct searches to find existing research that is relevant to new cases.

Time Matters also adds links to powerful LexisNexis® services.

Features include:

- One-search capability across internal documents and LexisNexis.
- Save excerpts (cite lists, opinions, etc.) from LexisNexis research sessions along with comments/notes within an electronic case file.
- Share research and case files with remote-office colleagues.
- Run automatic conflict checks and client background checks as new prospects are entered.
- View your record of legal research (including time spent conducting research) alongside your calendar, docket, tickler, case notes, documents, phone calls, email, billing and expense entries.
- Scan documents for citations in the Time Matters Document Management System (DMS) with *Shepard's Link* (for *lexis.com* only).

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Conducting LexisNexis Research

The LexisNexis Search form interacts with *lexis.com* and data is transferred over the Internet between Time Matters and *lexis.com*.

LexisNexis Research can be accessed in the following ways:

- From a record, select the **Lexis** tab, and add a new record.
- With a Contact, Event, Matter, or ToDo highlighted, go to **File > New Record > LexisNexis** (or press CTRL+SHIFT+W).
- Open the LexisNexis Research list and add a record.
- Select **Research**, **Get a Case**, or **Get a Statute** from the LexisNexis menu.
- Include LexisNexis Search in a Global Search.

These methods provide similar results; however, there are benefits to each method.

The first two methods automatically complete the Client and Matter Reference fields (if that data is available and that option is selected in Program Level Setup). Also, this information is passed along to LexisNexis as the LexisNexis Client (if selected in the LexisNexis set up). The other three methods pass the User Level LexisNexis Client (if provided) or the Program Level LexisNexis Client (if the User Level LexisNexis Client is blank).

Searching LexisNexis

After opening a LexisNexis form, begin your search using one of the buttons on the Research Bar: Research, Get a Case, Get a Statute, and Shepard's.



(If the buttons are not visible, click **View** on the LexisNexis form and then click **Research Bar**.)

Research

Conduct research in any LexisNexis source defined in Time Matters.

To Research LexisNexis Sources

1. Select a source from the drop-down list. Click the **Lookup** button to the right to add sources.
 2. Select **Terms & Conditions** to enter search terms with logical connectors such as AND or OR, or select **Natural Language** to enter search terms in the form of a question.
 3. Type search keywords or a query string in the **Search** entry box.
 4. Optionally, limit the search by a date range using the **Date** drop-down list.
 5. Click the **Search** button to initiate the search.
-

Get a Case

Access any case in the LexisNexis library.

To Get a Case

1. Type in the citation to retrieve.
 2. Optionally select the **Shepardize** check box.
 3. Click the **Search** button to initiate the search.
-

Get a Statute

Access any statute in the LexisNexis library.

To Get a Statute

1. Select a Location from the drop-down list.
 2. Depending on the Location selected, there may be different sources available. If so, select a source from the drop-down list.
 3. Type in the Statute Citation to retrieve.
 4. Click the **Search** button to initiate the search.
-

Shepard's

Perform a Shepardized search for any citation.

To Shepardize

1. Type in the citation to retrieve.
 2. Click the **Search** button to initiate the search.
-

Using Shepard's Link

Use *Shepard's Link* to scan documents for legitimate citations and transform them into hyperlinks that lead to the full text of the citation in the lexis.com research system. All citations that can be Shepardized will display a *Shepardize* hyperlink that will take you to the *Shepard's* report for that cite.

Shepard's Link v 8.2 or later must be installed on the workstation, and the Time Matters link must be installed for your word processor.

To Use Shepard's Link

1. From a Document form which references a *Shepard's Link*-supported file type, click the **Shepard's Link** button.
A confirmation screen may open. Click **OK** to continue. This confirmation can be made unavailable by selecting the **Do not show this message again** check box.
 2. A copy of the original document opens in your word processor. In the copy, each found citation becomes a hyperlink that leads to the full text of the citation in the lexis.com research system.
-

Martindale.com Lawyer Locator

You can search the *martindale.com*[®] Lawyer Locator for a Contact directly from a Contact Form. With the Contact Form open, select **View > Martindale Information**. A browser window opens and the Contact's name is used as the search basis on the *martindale.com* Lawyer Locator Web site.



On an open Contact Form, click **Edit > Toolbar** to add a Martindale button to the toolbar for quick access to the feature.

CourtLink

You can run a CourtLink search for a docket directly from a Matter Form.

To Run a CourtLink Docket Search

1. With a Matter Form open, select **View > CourtLink Area**. The CourtLink area displays in the middle of the Form on the Primary tab.
 2. Select a court in the **Court** drop-down list, or use the **Lookup** button to find a court.
 3. Select the type of case from the Case Type drop-down list.
 4. Type the number of the docket you want to search for in the Docket Number field.
 5. Select the **CourtLink** button. A browser window opens to display the CourtLink search results.
-

Billing

Use the Time Matters billing and expense tracking system to create invoices based on time and expense.

It is recommended that you perform the procedures required to set up Basic Billing in this order:

- Activate Basic Billing in Program Level Setup and User Level Setup
- Define Rate Tables and sales tax rates, and associate Rate Tables with Staff
- Set Program Level Billing Options, including the record type that forms the basis of your billing, default rates, and the address to use in the Bill To area of invoices
- Define payment terms to calculate due dates
- Define billing messages for printing on invoices
- Set Billing Preferences for each Contact or Matter

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Activating Basic Billing

You must activate Basic Billing to enable billing-related menu options that allow you to perform other steps such as setting up rates, payment terms and billing messages.

To Activate Basic Billing at Program Level and User Level

1. Go to **File > Setup > General > Program Level > Links > Billing**.
 2. Select **Activate Billing Option**.
 3. Select **Basic Billing** from the Select Billing Link drop-down list.
 4. Click **OK** to exit Program Level Setup.
 5. Go to **File > Setup > General > User Level > Links > Billing**.
 6. Select a User from the left column. Select **Activate Billing**. Click **Set Billing Options**.
 7. Either use all Program Level settings or customize the settings for each user. Click **OK**.
 8. Click **OK** to exit User Level Setup.
 9. After activating Basic Billing, you must restart Time Matters.
-

Rates and Rate Tables

Rate Tables are time savers. When an Hourly or Flat rate needs to be updated, changing that entry in the Rate Table updates everything using that rate (not retrospective). A Rate Table contains one or more Rate Levels, which are individual rates. When specifying a rate at which to bill a Client or Matter, you select a Rate Table and a Rate Level on that table.

You can assign Rate Tables to Staff, Billing Codes, Matters, or Clients.

To Create a Rate Table

1. Go to **File > Setup > Rates and Accounts > Rate Tables**.
 2. Click **Add**. The Rate Tables screen opens.
 3. Type a code (up to 15 characters) to identify the Rate Table in the **Code** field, and a short description of the Rate Table (up to 50 characters) in the **Description** field.
 4. Select **Hourly Rate** or **Flat Rate** for the rate type.
 5. Enter a level, description, and an amount. Click **Quick Add** to add the rate you typed at the next available level, or click **Add** to add a rate at a level using the Rate Level screen.
 6. When you are finished adding rates, click **OK**.
-

Assigning Rate Tables to Staff

When billing by Staff, the Staff must be associated with a rate table.

To Assign a Rate Table to a Staff

1. Set up a Rate or Rate Table as described earlier in this chapter.
 2. Go to **Database > Staff**.
 3. Open a Staff record. Select the **Options** tab.
 4. Set the Rate Type by selecting the Rate or Rate Table you have previously set up.
 5. Alternatively, set an Hourly Rate amount for this Staff member. Click **OK**.
-

Setting Up Sales Tax Rates and Sales Tax Groups

Sales tax rates are not required for Basic Billing, but you may need to set them up if sales tax will be applied on your bills. Sales tax rates are assigned to Clients and Billing Codes.

For instances where you need to combine rates, create a Sales Tax Group. For example, if State Tax = 5% and City Tax = 2%, when billing city residents you need a Sales Tax Group containing State and City tax rates. You must create sales tax rates before creating a Sales Tax Group.

To Create a Sales Tax Rate

1. Go to **File > Setup > Rates and Accounts > Sales Tax Rates**.
 2. Click **Add**. The Sales Tax Rates and Groups screen opens.
 3. Type a code (up to 15 characters) to identify the sales tax rate in the **Code** field, and a short description of the sales tax rate (up to 50 characters) in the **Description** field.
 4. Select **Sales Tax** as the Rate Type.
 5. Type the rate percentage in the **Tax Rate** field.
 6. When you are finished, click **OK**.
-

Program Level Billing Options

Now that you have defined rates, you can return to Program Level Setup and use those rates to make default billing settings.

To Set Up Program Level Billing Options

1. Go to **File > Setup > General > Program Level > Links > Billing**.
 2. Click **Set Billing Options**. The Time Matters Billing Setup screen opens.
 3. On the **General** tab, do the following:
 - a Set the record type(s) that form the basis of your billing.
 - b Set the first Invoice Number.
 - c Set any additional desired options.
 4. Select the **Rates** tab. The Global Rates list displays the Rate Tables you have defined.
 You can associate Rate Tables with Staff, Bill Codes, Clients, and Matters by clicking the corresponding buttons below the Global Rates list.
 5. Select the **Setup** tab and do the following:
 - a Select a rate table from the **Global Rate** drop-down list. This rate is used by default when no other rate is specified for a Staff, Client or Matter.
 - b Select a billing basis from the **Default Billing Basis** drop-down list.
 - c Type a default rate level (the rate's number within its Rate Table) in the **Default Level** field.
 - d Select a field (**Description** or **Memo**) to use as the basis for Invoice Item descriptions.
 6. Select the **Address** tab and select the fields that will be used to complete the Bill To area of Invoices created with Basic Billing. Click **OK**.
 7. Click **OK** to exit Program Level Setup.
-

Payment Terms

Payment Terms set due dates for payments and a description to print on invoices. Select Payment Terms when setting up client Billing Preferences.

To Set Up Payment Terms

1. Go to **File > Setup > Billing Options > Payment Terms**. Click **Add**. The Payment Terms Form screen opens.
 2. Complete the fields on the Payment Terms Form:
 - Terms Code**—Type up to four alphanumeric characters in the first field, and a description (up to 50 characters) in the second field.
 - Print Description**—Type a short description of the Payment Terms to print on Invoices.
 - Due After**—Type the number of days after which payment is due.
 3. Click **OK**.
-

Bill Messages

A Bill Message provides standard text to print on your invoices. You can select the message you want to use at the time you create an invoice.

To Set Up Bill Messages

1. Go to **File > Setup > Billing Options > Bill Messages**.
 2. Click **Add**. The Edit Bill Message screen opens.
 3. Complete the fields on the Edit Bill Message screen:
 - Code**—Type up to four alphanumeric characters to identify the Bill Message.
 - Description**—Type up to 50 characters to describe the Bill Message and how it is used.
 - Msg**—Type the message to appear on Invoices.
 - Default**—Select to make this message the default Bill Message.
 4. Click **OK**.
-

Billing Preferences

Billing Preferences let you set Payment Terms, Tax, and Billing rates for the associated Client. Billing Preferences are only available for Contacts or Matters marked Billable. Billing Preferences are available from the Contact or Matter list (depending upon your Program Level Setup).

To Set Up Billing Preferences

1. Open a Contact or Matter and go to **Edit > Billing Preferences**.

Alternatively, open the Contact or Matter list, right-click the required record and select **Billing Preferences**. (This option is only available for the record type(s) set as the default for billing.)

2. Complete the Billing Preferences screen:

Setup Area—Select the Payment Terms and sales tax rate to use for this Contact or Matter.

Rates Area—Select a rate source and rate level to use for this Contact or Matter.

Rates for this Contact/Matter Area—Select a rate table (or select **Custom** and click **Setup** to create a new rate table), or select **Hourly Rate** and type the rate per hour in the **Amount** field.

3. Click **OK**.

Using Basic Billing

The result of basic billing is an invoice that can be printed. The billing process has three possible starting points: (1) From a record form (for example, an Event), (2) From a Billing Form, or (3) From an Invoice form.

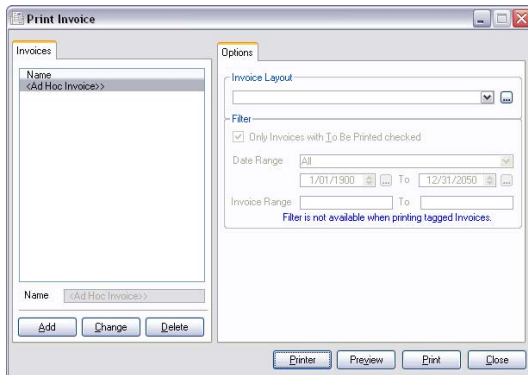
To Create an Invoice from a Record

1. Open any record. On the form's **Process** menu, click **Send To Billing**, or press CTRL+SHIFT+B. A Billing form opens.
2. Complete the required fields. In Area 2, the Billing Settings area, select a Bill Code, Bill Staff, and Bill By. In the Billing Details area, select your desired settings.
3. Click **Send Bill** when finished. An Invoice form opens.
4. Complete the Invoice form. From the "Bill To" drop-down list, select the record to copy the Billing address from. The Bill To area is completed based on the matching in Program Level Setup.

DATE	CODE	QTY	DESCRIPTION	RATE
1/03/2006	RESEARCH	3	Discussion with Client	115.00
1/10/2006	MEETING	2	Meet to go over trial strategy	155.00
				0.00

5. Add additional billing entries on the Invoice by clicking once in the Date column of the billing details section. Press INSERT to add a new line.
6. Double-click the Date field, type data in the field, and press TAB to move to the next field.
7. Entries made directly on the Invoice screen automatically create corresponding Billing records. Click **Save and Close**.

8. Open the Invoice List by going to **Billing > Invoice List**.
9. Highlight the required Invoice or tag multiple Invoices and click **Print**.
10. Customize print options on the Print Invoice screen, and click **Print**. For details, see *Printing Invoices* on page 61.



Printing Invoices

Click **Print** from the open Invoice form or from the Invoice list to open the Print Invoice screen.

Invoice Layout—The Invoice Layout determines what fields are printed and where they are printed. Click the **Lookup** button to the right of the Invoice Layout field to edit a layout or add a new layout.

Only Invoices with To Be Printed checked—Select this check box on the Print Invoice screen to print only Invoices with **To Be Printed** selected on the Invoice form. This is a shortcut that eliminates the need to tag and process the desired Invoices.

Date Range/Invoice Range—Filter and print only Invoices that fall within the criteria specified.

Add/Change/Delete—Located in the lower left corner of the screen, add, change, and delete saved Print Invoice settings. This is used when a combination of settings is required repeatedly.

Reports

This chapter describes the reports that are available in Time Matters, how to generate them and how to print them.

Reports

Time Matters includes procedures to create hundreds of reports from combinations of formats, options, filters, and attachments. Your customized report settings can be saved for reuse under names you specify.

Go to Report on the Main menu. From the Report menu select the Report to be run. The Report Specifications screen opens.

Note: Some report types do not require you to set specifications. For these report types the Select Format screen opens, a format is selected, and when **OK** is clicked the report is printed. Examples of this report include Special Dates and Security.

Using Reports

Reports are used in two ways: (1) On-demand reporting, where the same report is run using different matching criteria each time, (2) Saved criteria reporting, where the same report is run using a saved set of criteria each time.

To Run a Report on an On-Demand Basis

1. Open the list that contains the record type you will be running the report for. Click **Print** on the list toolbar. The Report Specifications screen opens.
 2. The report works with the matching criteria set up on the Filter and Additional tabs of the Report Specifications screen. Highlight the desired report specification in the Format list. Click the **Filter** tab.
 3. Filter. Only records that match the criteria set here will be included on the report. If nothing is selected here, no filter is applied and the report will print information for every record.
 4. Click **Print**.
-

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To Run a Report Using Saved Criteria

1. Open the record list for which you want to run the report. Click **Print** on the list toolbar. The Report Specifications screen opens.
2. The report works with the matching criteria set up on the Filter and Additional tabs of the Report Specifications screen. Highlight the desired report specification in the Format list.
3. Click **Add** in the lower left corner of the Report Specifications screen. Select **Program Level** (all users have access) or **User Level** (accessible to current user only). Click **OK**.
4. Name the report in the Name field at the top of the Report Specifications screen. Click **Save**.
5. Filter. Only records matching these criteria are included on the report. If nothing is selected, no the report prints information for every record.
6. Click **Save**.
7. Click **Print**.

You can now use the saved settings in future reports.

Search, Tag, and Print

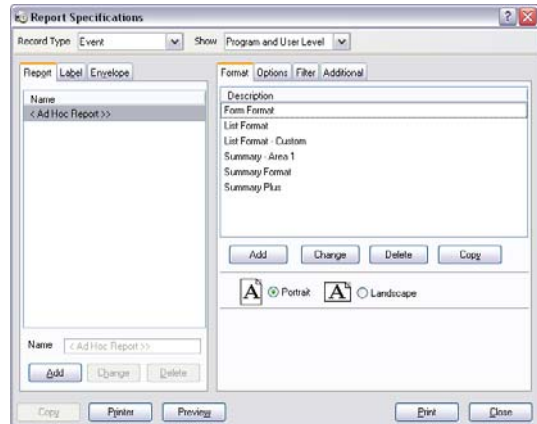
After tagging records, you can print them. Search, Tag, and Print is usually done from a List or Calendar.

With the records tagged, click **Print**:

- If no records are tagged, the report will contain all records on that List.
- The Daily Calendar contains all records for that day. Normally, you will want to limit the report by Searching and Tagging selected records.
- The Form toolbar of an open form allows you several choices to print that Form. The choices are given on the Report Specifications Screen.

Report Specifications Screen

When a report is to be printed containing information which can be filtered and sorted, the Report Specifications screen opens. Choose the record type for the report from the drop-down list.



Format Tab

Select the **Format** tab on the Report Specifications screen. The report format refers to which fields appear on the report and their arrangement. Four standard Formats are available: Calendars (Events and ToDo's), Lists, Summary, and Form. Also, you can add your own Custom Formats.

Daily, Weekly, Monthly, and tri-fold (pocket) Calendars are available. These show Event and ToDo records (the Pocket Calendar can also list Contact records), and include Contact and Matter information from the Event and ToDo records.

The List format shows one record per line and includes the most basic fields. The Summary format has several lines per record. Both reports can also include the memo fields. The Form format can show most fields, including the memo.

The Report Orientation refers to how the report is placed on the paper. Two options are available: (1) Portrait, and (2) Landscape. These refer to the standard printer settings for paper orientation. Select the Orientation from the Format tab on the Report Specifications screen.

For Calendar reports, important format settings are controlled by the Set Font, Margins, and Fields buttons. The Fields button allows you to specify which fields appear on a Calendar report.

Options Tab

These options determine which fields appear, plus other report layout preferences. For example, on a Weekly Calendar, there are options for number of weeks, 5 or 7 day week, and time range. Other options are to include Events and ToDo's, and to show hidden records or members of groups, etc. The following screen is typical, but will change since the Options are based on the Format chosen.

Show Only Master Record if Linked—applies to formal groups only where the report being printed is based on a master record. If used, child records will not be printed as part of the report. This option cannot be used if printing tagged records. This option cannot be used if printing from a filter that excludes the master record.



If printing Group reports, be sure to select the Show Members (Expanded) option to include the schedules of Group Members.

Filter Tab

Filters refine the group of records included in the report. Filters work the same way as in a Combined Search. They are not available when records are already selected by tagging.

A date range can be selected from the Date menu for all records except for Contacts and Matters. The date range can be set as relative to today.

Additional Tab

If you select **Include Related Records** and click the **Options** button, a screen opens for you to specify the basis of the Relations. This selection determines which records are to be included, and the format of the Related Records part of the report. This is similar to the Related Records Properties screen. This option is not available on the Calendar formats.

You can limit which Related Records are included. If you only wanted to see the ToDo's for a Matter report, have only ToDo's checked on the Select tab on this screen.

You can also select a format for the Related Records part of the report. This is the same Form, List, or Summary format available on the main records Format tab. For example, you can use a Summary Format for the main Matter report, but use List format for the Related Records part of the report.

Report Menu

Additional reports are available from the Report menu. File Reports include the feature templates you have set up, security settings, and the Master Audit Log. Calendar Reports include reports on Calendars, Special Dates and Timetables. Under Database Reports you can print lists of Staff and Groups and view the Report Specifications screen. Special Reports include an Inactivity Report.

The Inactivity Watch Report helps you find Matters and Contacts for which no activities have been scheduled or changed within a specified date range. Go to **Report > Special > Inactivity Report**. Select the **Records to Watch** tab to specify the records to include in the report. You can also select to search Contacts and/or Matters for the Report.

Print to PDF & RTF

Use the print to PDF and RTF options to create documents without opening a word processor application such as Word or WordPerfect.



Saving to PDF or RTF, creates a document, requiring hard disk space. An increasing number of PDFs or RTFs will require an increasing amount of hard disk space.

From any open list click the **Print** button. The Report Specifications screen opens. Click the **Preview** button and the Report Preview screen opens. Click **Save** and the Advanced Report Save screen opens.

Glossary

Alert

Alerts inform you when something important, or with a long lead time, is placed on your Calendar. If the Alert check box on a record form is selected, the record will appear on the Alerts and Reminders screen until it is "accepted." To accept a record, right-click the record and click Accept. When you accept an Alert, you can set a Reminder for the Check Date. Then this record will only appear on the Reminder day(s).

AR (Accounts Receivable)

Accounts Receivable (AR) is the amount owed by a client. It reflects payments, credits, write-offs, and refunds.

Associated Record

Related records can also be called "linked" records or "associated" records. You can associate records with Outline elements and use the Outline to track task-based records that have been completed. After you associate a record with an Outline element, you can open that record from the Outline Form by double-clicking the element icon or by highlighting the element and clicking the Open Associated Record button on the toolbar.

AutoEntry Form

AutoEntry forms are pre-completed forms. Use AutoEntry forms to save typing and to process repetitive tasks quickly. For example, you frequently email a static group of clients. Create an AutoEntry Form with their names added to the To: field in addition to other basic pieces of information that do not change, such as the subject line or the address of a meeting place. When needing to send the email, open a new Email form and select the AutoEntry form. The basic information is completed. No data is overwritten when an AutoEntry form is used.

Automatic Relation

An Automatic Relation is created automatically based on the data in the fields of the respective records. For example, if on the Related tab of the Brown Apparel Matter record, all other records that have Brown Apparel as their Matter will be shown as a Related Record. Records are shown and not shown on the list as data is added and deleted that creates and breaks matches in the data fields. Linked records can also be shown as Automatic Relations.

AutoTXT Code

AutoTXT Codes are used with forms, and allow you to associate a Code of four alphanumeric characters with text. The text will print in the Description or Memo field of the applicable record. You can also create a monitor from an open Contact or Matter record. AutoTXT Codes can be set up and used to replace common text such as: tct = Telephone call to; ocw = Office conference with, or whatever text you choose to associate with a new code.

Bill

Bills are more flexible than invoices, and allow for more detail. Bills can print all billing activity, including time, expense, taxes, interest, payments, and balances, and conform to Fee Arrangements.

Bill Express

Bill Express brings two Billing Matters functions together to create a bill in one easy step. Bills created using Bill Express will automatically create a PDF for printing the bill, and will post.

BillFlow Manager

The BillFlow Manager is designed for managing bills through a review and approval process, creating multiple bills, and tracking the progress of a bill. A benefit of using the BillFlow Manager is to see what the status is of the bills being processed. It is useful for sites that enter time and expense information throughout a billing period, and would like to manage the entire billing process from printing Pre-Bills, making adjustments to printing Bills. A Pre-Bill lets your Staff review all billing information.

Billing Code

Billing Codes identify and categorize time and expense billing entries. Billing Codes can determine whether a Client is being charged and how much they are being charged. You can assign a Markup or Discount with a Bill Code. Billing Codes are different from Classification Codes, which identify the Billing record. The Billing Item Form Classification Code and the Billing Code may be the same, but it is not required.

Billing Item

Billing Matters tracks billing activity through a master Billing Item List. The Billing Item Form is used to enter Expenses or Time spent for the Contact or Matter. Timesheets are quick and easy, whereas the Billing Item record is detailed and can take time to complete. You can view and edit Billing Item Form entries from: 1) the Billing Item List, 2) the Quick Item, 3) the Timesheet, 4) an Invoice form (if the invoice has been posted you can view, but not edit, the entry), or 5) the Contact or Matter record.

Chain Template

A Chain Template links, or "chains," records together in a way that can be re-used as a template. A Chain Template can then be used to schedule multiple items by completing a start date and information common to all the items, such as Staff, Matter Reference, etc. This schedule is called a Schedule Chain.

Classification Code

Classification Codes organize the record types into groups of activities and information. Use of Classification Codes to improve searching, sorting, and reporting. You can add as many Codes as needed by your firm, but each Code must have a unique (up to) four character identifier, such as DEPO for Deposition. You can add multiple Classification Codes to an individual record. For example, if a Contact is involved with the practice in multiple Matters, and as such is an Employee, Attorney, Vendor, Specialist, and Main Contact, this Contact can be referenced by all five codes (EMP, ATT, VEN, SPEC, and CON).

Custom Form

Custom Forms are unique forms set up by the user. Create and use a Custom Form when no other form matches your data entry requirements. Custom Forms are shown on the Custom Form list and can be linked to any record. A Custom tab is available in each of the record forms.

Drop-down List

Forms and lists may offer options displayed by drop-down menu. This will speed up the process of reviewing and selecting relevant options while working with your data.

Element

Each task entered into an Outline called an element. Once your outline has been created, an element can be associated with a new record of any type, such that a "Review Document" element can be associated with a new ToDo scheduling it for a particular Staff.

Following

Following moves records from one day to the next until they are marked as Done. When the Following field is checked for a record, such as a ToDo or an Event, the Date field will advance to keep the record current until the record is marked as Done by selecting the Done check box.

Form

Forms are a collection of entry fields where the information for one record is entered. While each record type has its own unique entry fields, there is similarity in how all record forms work.

Form Tab

Use form tabs to select different views of a form. Record types have multiple tabs. All records have a Primary tab that includes the most commonly needed information. Contact and Matter forms have Secondary, Additional, and Timeline tabs. Other tabs may appear, depending on application settings. These tabs represent the Supporting Record forms (Custom Forms, Notes, Documents, Phone Calls, Email, Mail, Web, Billing, and User Defined records).

Formattable Clipboard

The Formattable Clipboard can partially or completely automate the generation of routine documents by capturing record data and transferring it to another application with a few keystrokes. You create custom clipboard formats that determine which fields will be placed in the Clipboard and in what arrangement. Using special codes and pre-entered text the Formattable Clipboard can produce complete documents. You may find that the Formattable Clipboard is an easier way to create documents than a merge, and in many cases, the Formattable Clipboard offers more flexibility to create documents than a merge.

Inheritance

When a new record is created from within another record, information from the starting record is automatically filled in on the new record. For example, from a Contact form, press CTRL+SHIFT+E to open an Event form. The Event form will already contain information entered on the Contact form. Extended Inheritance copies most data fields in an open record to a new record. Fields that do not match the new record type are not copied, such as Classification Codes.

Invoice

Invoices show current billing activity only in the form of time and expense, taxes, and interest. Invoices do NOT show transactions such as payments or balances, and ignore Fee Arrangements. If transactions such as payments or balances are desired, or fee arrangements, use a bill instead of an invoice.

Journal

Journals provide a central location where you can view and work on many records at one time. The Journal is a good place to work on dated records that are due in the immediate future. The Contact and Matter Journals provide access to all records that fall within a narrow date range and that are linked to a particular Contact or Matter. The Personal Journal provides access to records that fall within a narrow date range and that are linked to a Staff member and/or user.

Laptop Database

Laptop computers are often used to work on Time Matters data apart from the main database. A remote database is installed on the laptop and is regularly synchronized with the main (or "host") database. In this case, the host database is on your office server and the remote database is on your laptop, home computer, or branch office server. Time Matters also allows more complex configurations, such as a main office that synchronizes with a branch office to which laptops or home computers synchronize. In this scenario the branch office is both a host to the laptops and home computers, and a remote to the main office.

Linked

In Time Matters, records can be linked. Fields from the linked record also appear in the fields of the records it is linked to, such as Contact phone numbers that can appear in the Matter, Event, and ToDo forms. If the Contact information changes, it can automatically be updated in all records to which it is linked. Linked records can also be shown as Automatic Relations.

List

All record types are displayed on main lists, which are the starting point for locating, adding, viewing, editing and deleting records. All main lists function similarly although they show different fields.

Besides main lists, there are sublists, which appear on all record forms and display supporting records related to the record you are viewing. Lookup lists complete fields in forms and are used to look up information from another file. The Feature list provides a way to add, change, and copy feature templates which can be reused.

Lookup

Lookup lists look up and validate data from another file. For example, if a record field requires you to enter a Contact, you can click the Lookup button beside the field to view a list of all your Contacts and select the one you want. This can create an automatic relationship between the record you are editing and the Contact you select to enter in the field. When data is modified on one record, the other record is automatically updated with any changes that affect it as well. The Lookup button changes its appearance to a double arrow to indicate that an automatic relationship exists between the linked records.

Main Database

You must designate one database as the main database, sometimes referred to as the host database. Remote databases such as those installed on laptops or in branch offices must regularly synchronize with the main database to ensure that the same data is available to all users. A Host may have multiple associated Remotes, however a Remote can have only one Host. Typically, the Host is on your office server and the Remote is on your laptop, home computer, or branch office server.

Merge

Merges are a way of automating document generation, similar to Formattable Clipboards. The merging takes place in your word processor, but you can run the merge automatically from Time Matters. A template containing the standard document is set up containing fields that are completed when the procedure is run. The main difference here is that this form is set up in your word processor rather than in Time Matters. Merges start with two components:

- (1) The standard document to be duplicated, called the Form document, and
- (2) The source of the information to be merged into the standard document, called the Data document.

You select one or more records (Data), select the template (Form), and your word processor starts and creates a file completed with data from the selected records (Output).

Merge Data File

A Merge Data File consists of the names and information to be merged into the standard document. The Data document is created in Time Matters by selecting one or more records.

Merge Form File

A Merge Form File is a standard document you want to duplicate. The Form document is created by your word processor as a template containing fields to be filled by the Merge Data File when the merge is run.

Merge Output File

The Merge Output File is where merged documents appear after you select one or more records, then select a template and complete the merge. Your word processor opens and creates a file completed with data from the selected records. The Output File can be printed and saved, or edited in your word processor.

Monitor

Monitors alert you when specified Contact or Matter records are added, opened, or deleted. You can monitor individual records or a range of records that meets your criteria. When a monitored activity occurs, the Contact/Matter Monitor window opens to display the specified message.

Outline

Outline records represent scheduled workflows organized in outline form. An Outline is used to break down projects into smaller tasks, with each task called an element of the Outline. You can associate records with Outline elements and use the Outline to track task-based records that have been completed. The Outline provides a snapshot of both the required elements and chronology for completing a task.

Outline Template

An Outline represents the breakdown of a project into smaller tasks. Each task on the Outline template is called an element. The Outline provides a snapshot of both the required elements for completing a task and the chronology. Elements can then be associated with the four main and/or associated record types.

Process

Process features work on tagged records on Calendars and lists. (The Process menu on a record form allows processing of that record.) All tagged records are acted upon simultaneously using the Process menu. Process lets you copy records to the clipboard, archive records, apply changes to records, and more.

Productivity Report

Productivity Reports in Billing Matters compare billable vs. non-billable hours.

Profitability Report

Profitability Reports in Billing Matters compare the original value of time vs. the billed value.

Program Level

Program Level settings affect all users, regardless of workstation or user. These settings are saved in the central database and apply whenever that database is used. Some changes require you to restart the application. Program Level settings include links to other applications such as billing applications.

Quick Tab

Quick Tabs are filters based on saved searches, so that when the Quick Tab is selected on a list, the filtered list shows. For example, a Quick Tab for Clients on the Contact list filters the list so that only Contacts who have the Classification Code of CLNT (Client) are shown when that Quick Tab is selected. Quick Tabs work in tandem with Quick Menus, creating the items that appear on Quick Menus.

Record

A record is made up of a set of fields. The four main record types are Events, ToDo's, Contacts, and Matters. Supporting record types are Custom Form, Note, Document, Phone Call, Email, Mail, Outline, Web (Lexis), Billing, and User Defined records.

Related

Related Records answer questions such as "show everything for this Staff," or "show everything for this Contact". On any record form, the Related tab will show any other Event, ToDo, Contact, or Matter record that has the same Contacts, Matter, or Staff. Using Related Records to create a new record will automatically complete some fields. For example, if a Contact is entered on a Matter through Related Records, the Matter field will be automatically completed on the new Contact.

Reminders

Reminders notify you in advance of upcoming items. You can view Reminders on the Alerts and Reminders screen or on the Journal. In the Reminder field of a record form, you can set a Reminder as an individual date, a date range, or a combination of the two. For example, you can receive Reminders at 21 days, 14 days, and each of the 7 days prior to the actual record date by entering "21,14,7-1" in the Reminder field.

Remote Database

Remote databases are installed on laptops or other computers that do not always have access to the primary database. You must regularly synchronize the data in a remote database with the primary database. Synchronization prevents changes from being lost from either database. Please note that a Remote database should never be synchronized with more than one primary database.

Schedule Chain

A Schedule Chain is a type of Chain Template. Schedule Chains automate the scheduling of a series of items, just by completing a start date and entering basic information such as Staff, Matter Reference, etc. Essentially all the Events, ToDo's, Notes, Phone Calls, etc. of a Matter that follow standard date sequences can be saved and reused as a Schedule Chain. The Chain Template lets you save as a template the sequence of Events, ToDo's, and other items. This template can then be used to automatically create an entire set of activities based on a few common entries, such as Base Date, Regarding field information, or Staff.

Send to Billing

Send to Billing opens a new Billing Form to send information from the current record to a Billing record. When you Send to Billing, the add screen for the Billing Form opens.

Specified Relation

Records related by a Specified Relation may or may not have data that matches. These records are related because you specify that they are related. Specified Relations must be created and deleted. On the Related Records list of a record form, records that are Specified Relations will have the tilde ("~") symbol in front.

Staff

A Staff is treated by the application as a resource. A Staff can be a person, a conference room, or an overhead projector. Schedule Staff for Events and ToDo's and assign Staff to work on Matters and Events. Users, on the other hand, are users of the application - they log in, type data, run backups, and schedule Events and ToDo's for Staff. A Staff and a user can represent the same person.

Statement

Statements are available for accounts. They can be viewed or printed from the Standard Reports screen.

Sublist Tab

Sublists appear on certain tabs on the forms for all record types. These lists display records that are related to the open record. Records added from a sublist are automatically related to the form's record. In other words, the linking fields are automatically completed. While some sublists are slightly different, they all have common elements. On a sublist tab, there are toolbar buttons above the list to add, change, and delete, plus search, process, etc.

TimeChart View

The TimeChart is a special type of tagged record list that displays dated records in a horizontal calendar format. Tag one or more dated records and click Process > Show on TimeChart. The TimeChart displays several days' worth of dated records by default.

Timeline

The Timeline tab, available on Contact and Matter Forms, is for viewing all date-dependent activities associated with a Contact or Matter in one place in chronological order, listed by date and time. Buttons on the sublist toolbar toggle on and off each of the different record types.

Timesheet

The Timesheet records Billing information. The Timesheet is a quick and easy way to enter basic information, without users being confronted by too much complexity.

TM Connect

The TM Connect button appears on the Outlook toolbar, and lets users link email, contacts, task, and calendar items from Outlook to Time Matters. Information from emails may be important for tracking what has happened with a case or client, but emails are the most likely information type to be lost. Using TM Connect helps capture and retain this important information, plus link it to the relevant case or client.

TM Insider

TM Insider provides access to your data from word processing applications including Microsoft Word, Excel, PowerPoint, and Corel WordPerfect. A toolbar button and a File menu command are added to the third-party application to call the Insider while you are editing a document. The Insider screen has two sections: a list of Time Matters records at the top, and a list of available clipboard formats at the bottom. Select a record and a clipboard format to copy data from that record and insert it into the document you are working on. The Insider provides all the searching, filtering, sorting, and tagging features of Time Matters.

TM Open

TM Open is a toolbar button inside your supported third-party application. When it is clicked, a list of records in the Time Matters database opens. In the list, highlight a record and click Select to open it in the third-party application.

TM Save

The TM Save button appears on the toolbar of your word processor (when enabled in the word processor's toolbar options). When you create a document in your word processor, you can click the TM Save button to save the document as a Document record, or select Save to Time Matters from your word processor's File menu. TM Save is available for Microsoft Word, Excel, PowerPoint, Internet Explorer, Adobe Acrobat, Adobe Reader, Mozilla Firefox, and Corel WordPerfect.

Trigger

A series of actions can occur automatically. For example, adding a new record could cause a message to be sent to a Staff member. To make such a series of actions possible, set up a Trigger. Triggers are a set of rules affecting all records fitting into the scope of the Trigger-the scope being user-specified. When a Trigger is set up, it affects both existing records and those created in the future. Triggers fire when a record is saved that has experienced a Trigger-associated change.

User ID

User IDs are IDs set up to access the application. User IDs are different from Staff or Resource IDs. Users are anyone who will be physically logging in to the program and viewing, changing, or entering data. Even if the person does not have their own calendar, they will need a login. Without a User ID and Password, a person cannot log in to Time Matters.

User Level

User Level settings affect a specific user, regardless of which workstation they are working from. These settings are saved in the central database and activate whenever a user logs in to the program, regardless of the workstation used to log in. Examples of User Level settings might include the default view a user sees when logging in, such as calendar view or window colors.

Watches

To make sure that a Matter or Contact is not being overlooked, records can be monitored with an Inactivity Watch. You can define the maximum allowable period of inactivity for a particular record type. For example, if you want to review all Matters at least monthly, select Matter and enter 30 days in the next area, then monitor activity by checking Events, ToDo's, and all Supporting Records. You will be warned if a Matter record or any of its related records has not been changed in the last 30 days. Advanced Searches let you watch just certain types of Contacts and Matters. For example, you can narrow down Contact records to monitored only your Clients. Any Contact or Matter records that meet the Inactivity Watch criteria will be shown on the Alerts and Reminders screen. The Type column will identify these records as Watch records.

WIP (Work in Progress)

Work in Progress (WIP) represents unbilled fees and expenses. WIP is generally viewed by Client, Matter, Time and/or Expense.

Workstation Level

Workstation Level Setup determines settings that apply to anyone using a particular workstation. These settings are stored in the workstation's TMW.INI file found in the Windows Directory.

Appendix A—Putting It All Together

The following scenario outlines the way you might use Time Matters to perform the steps in the initial phase of representing a new client.



The navigators and navigator related features discussed in this section may vary from those in your installation of LexisNexis Total Practice Advantage. Your navigators will include features that are relevant to the jurisdictions and practice areas included in your subscription.

1. A prospective client contacts you with a personal injury case against a supermarket, where the client slipped and fell on a wet floor. You quickly create a new Contact record, applying the code for "Potential Client." In the Memo area, you enter some initial notes about the incident.

Use the **New Contact Intake Wizard** to add a new Contact record. Complete as many fields as possible.

On the last screen of the wizard, select **Yes** to view the full Contact record form.

On the Contact form, fill in any additional fields, including notes in the **Memo** area.

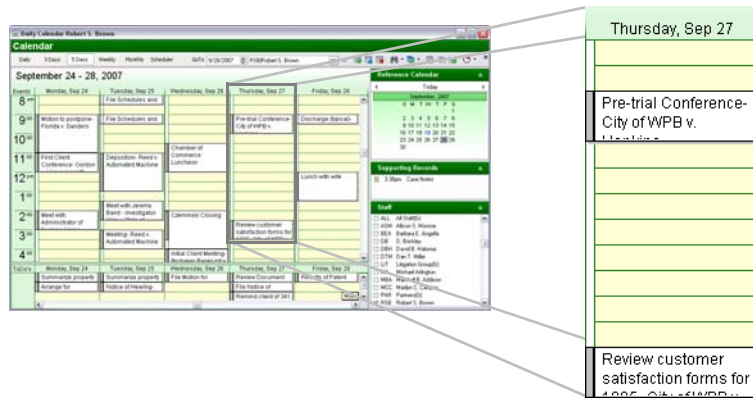
The image shows three screenshots from the LexisNexis software interface. The top screenshot is the 'Create a New Contact - Finish' screen of the wizard, with callouts pointing to the 'Ref Name', 'Last', 'First', 'Sal', 'Pre', 'Suf', 'Firm', 'Title', and 'Website' fields. The middle screenshot is the 'Would you like to view the contact form now?' dialog box, with callouts pointing to the 'Yes' and 'No' radio buttons. The bottom screenshot is the full 'New Contact' form, with callouts pointing to the 'Area' dropdown menu and the 'Memo' text area containing the text: 'Ms. Lewis slipped in an aisle with a puddle of water on the floor. No "wet floor" sign posted.'

2. Pulling up your calendar, you scan the upcoming week for an available time to schedule an initial meeting with the client. You decide to plan the meeting for the next Thursday afternoon.

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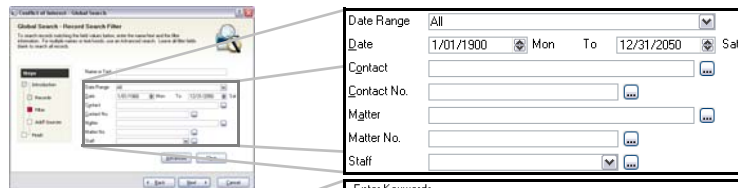
After finding a suitable time, you double-click the time slot on your calendar to create an Event for the meeting.

On the Event form, put the client's name on the Regarding line and set reminders to display before the meeting.

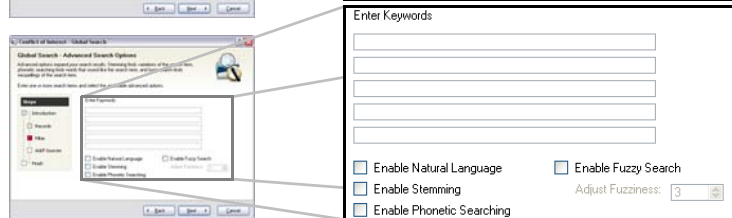


- Before the meeting, you do some research to determine whether you can represent the client. You start with a global search of your database to determine whether any prior relationship with the client exists that could constitute a conflict of interest.

Set the filter to include all records regardless of date, related Contact or Matter, or Staff.



Use the **Enable Phonetic Searching** feature to find records containing names with similar pronunciations.



- After the conflict of interest search, you perform a background check to see whether the client has a criminal record or a history of bringing similar lawsuits in the past.

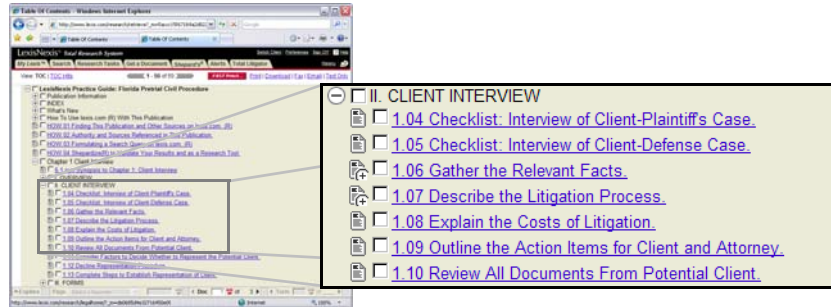
The Client Development navigator includes a **Background Check** option. Use it to find information online regarding assets, legal records, and more.



5. The background check doesn't raise any concerns, so you begin preparing for the initial client interview, using the checklist in the online LexisNexis Practice Guide as a reference.

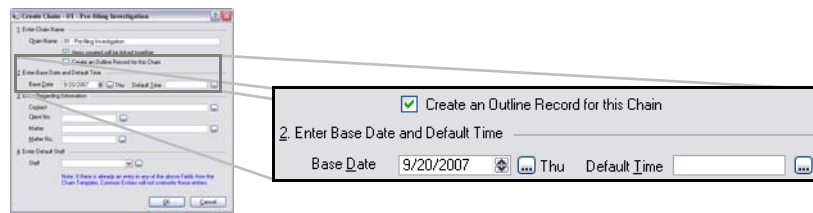
On the Navigator **Tasks** list, click the option to research the client interview stage of pretrial procedure.

In the LexisNexis Practice Guide, click and read the sections of interest.

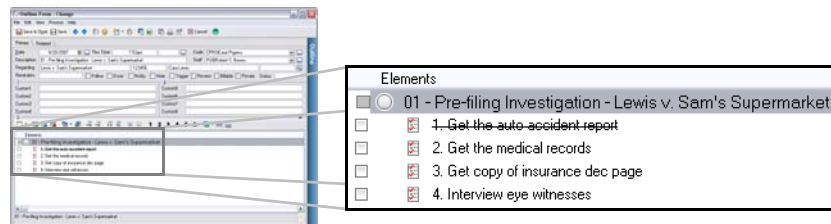


6. Having agreed to represent the client, you create an Outline record to ensure that all the necessary pretrial steps are followed. You have a Schedule Chain already set up to calculate deadlines for personal injury cases in your state, so you use that to create an Outline and a set of ToDo records for the various steps to take in pursuing the case.

When creating a new Schedule Chain, select the option to **Create an Outline** for the chained ToDo records.



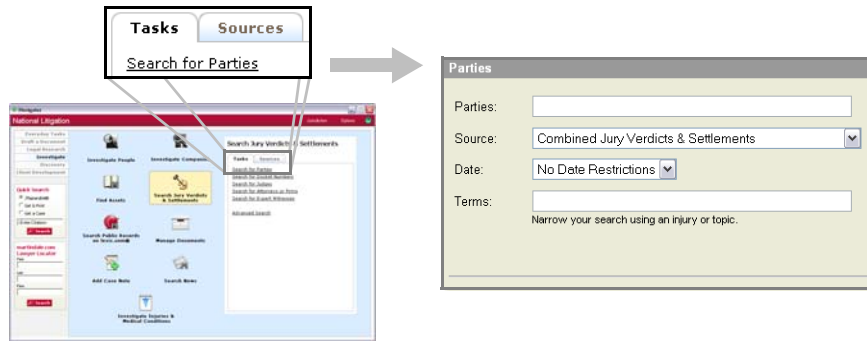
The Outline form shows the individual ToDo records associated with each Outline element. As you complete each element, you can mark it **Done** on the Outline.



7. You do some research to learn the outcomes of similar suits brought against the supermarket, which is part of a chain, and who represented the company in those suits. There are many options available that allow users to perform this type of research using Time Matters, including searches on *lexis.com* and CourtLink®.

Time Matters 10.0 - New User Guide

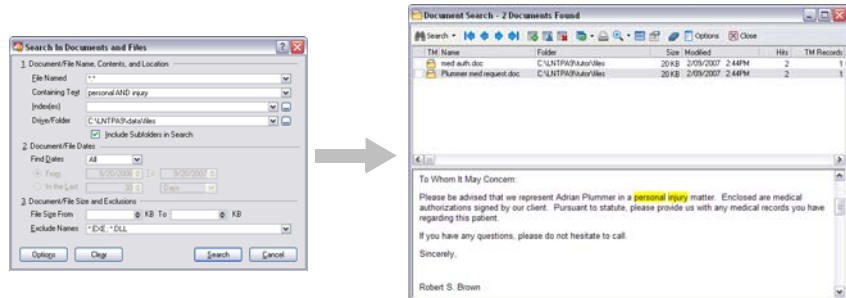
On the Investigate navigator, use **Search Jury Verdicts and Settlements** to find information about previous suits involving a particular party, judge, or attorney.



- After completing your preliminary research, you prepare to draft and file a complaint on behalf of your client. You decide to search your firm's document library first to see if any existing documents are suitable as a model for the complaint.

Specify file types, keywords, document indexes, and folders or drives to search.

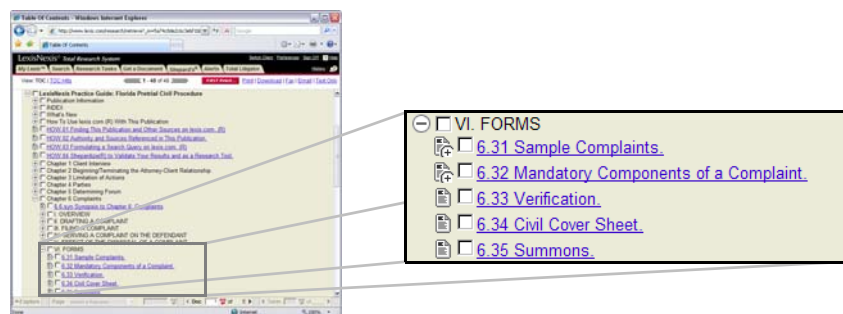
Highlight a document in the search results to see a preview of its contents.



- You aren't satisfied with the documents you already have, so you decide to base the complaint on one of the model documents available on *lexis.com*.

Select a type of form or model document on the Tasks list in the Draft a Document navigator.

When you locate a form or model document on *lexis.com*, you can download it and save it as a record in your database.



With the complaint completed, filed and served, you begin the discovery phase of the case. Time Matters provides extensive assistance in discovery, giving you easy access to online LexisNexis Practice Guides, checklists, forms and model documents, as well as helping you manage all this information in the context of your clients and matters.

Appendix B—Fillable Forms

When using LexisNexis Fillable Forms, you can easily and efficiently complete forms in Time Matters using Microsoft Word.



The navigator features discussed here may vary from those in your installation of the software. Your navigators include features that are relevant to the jurisdictions and practice areas in your subscription.

Fillable Microsoft Word Documents

Each LexisNexis fillable form contains Microsoft Word fields where you can enter information. In many forms, these fields also include advisory text (designated in red), which provides example answers or indicates the type of answer that should be entered for a particular field.

Example: [Redacted] (Defendant's Name)
[Redacted] (Address)

Once you complete a form, you can remove the advisory text. Follow the procedure *To Remove All Advisory Text From the Form* on page 80.



If your Windows settings cause the Word document for a fillable form to open in Internet Explorer instead of in Word, see this Microsoft support page: <http://support.microsoft.com/?scid=kb;en-us;162059>

To Enter Custom Answers in a Document

1. Open the Microsoft Word document you want to complete. You will see several gray form fields throughout the document.

Example: Defendant [Redacted] is a corporation that operates a [Redacted] store in [Redacted] County, Pennsylvania.

2. Click on a gray form field and enter the appropriate response. (When you click on a gray form field, the gray shading disappears and you can type as much text as needed.)

Example: Defendant *Great Foods* is a corporation that operates a *grocery* store in *New* County, Pennsylvania.

Removing the gray shading from the fields can also be accomplished by clicking the **Form Field Shading** button.

Navigating Quickly Through a Document

Depending on how many fields there are in the document, you may want to tab between fields. Tabbing may make the answer entry process quicker and easier. To do this, you must enable the **Protect Form Feature** in Microsoft Word. When you protect the document, all text surrounding the fields will be protected—you will not be able to modify the text.

To Enable Tabbing From Field to Field

1. From the View menu, go to **Toolbars > Forms**. The Forms toolbar appears.
2. Click the **Protect Form** button on the Forms toolbar.

Note: When you have entered all of the necessary information in the form, you can unlock it again by clicking the **Protect Form** button.

Removing Advisory Text


Before saving a final copy of the document and submitting it to the court or agency with which you are working, you should remove any advisory text from the document. You may also want to remove the LexisNexis copyright line that appears at the top of the document.

If you revise or copy and paste advisory text in the document, this text will be deleted when you complete the following steps.

To Remove All Advisory Text From the Form

1. After the document is completed, select **Replace** from the Edit menu.
 2. Click the **More** button, and then click the **Format** button.
 3. Select **Style**, and choose **LN Advisory Text** from the list of styles.
 4. If **Find what** or **Replace with** is selected, clear these items, and select **Replace All**.
-

Resetting the Form

Once you have created a custom document and have saved or printed a copy of it, you can reset the form so it can be completed for a different client or case. To reset the form, click the  **Reset Form Fields** button.

Fillable PDF-Based Forms

Each LexisNexis fillable form contains fields where you can enter your information. Viewing a form template at the Form Document in the assembly window allows you to type answers directly in the form fields.

To Direct-Fill a Form

1. Click the **Form Document** tab to display the form and the answer fields.
2. Select a field. The field changes color.
If the field turns yellow, type your answer.

If the field turns gray, select the answer wizard button to display a pop-up dialog where you can type your answers.

3. Press the **Tab** key to move to the next field or select a field with your mouse.
 4. When the document is completed, you can print or save it using the buttons in the assembly window toolbar.
-

To Save a Completed Form

From the File menu, go to **Save Document As**. You can save the completed form as an HPD (editable HotDocs document) or PDF (universally distributable Adobe document) by clicking on the **Save as Type** drop-down box.

To Revise a Form

Open the HPD document in HotDocs Filler and make revisions. You can print or save the revised form.

Opening a Completed Document

After a document has been completed and saved, it is no longer connected to the original template from the Automated Forms library. You can open the document for printing or editing, but any changes will be represented only on the customized document.

To Open a Completed Form Document (HPD, HFD Format)

1. Click the **Start** button on the taskbar.
 2. Point to **Programs > HotDocs 6 > HotDocs Filler**. HotDocs Filler opens.
 3. Choose **Open** from the File menu or the toolbar.
-

Appendix C—Guided Search Forms and Checklists

This section provides a brief description of Guided Search Forms and Checklists.



The navigator features discussed here may vary from those in your installation of the software. Your navigators include features that are relevant to the jurisdictions and practice areas in your subscription.

Guided Search Forms

Guided Search Forms are forms that automatically create a *lexis.com* search based on your input. Enter information in one or more fields on the form and click **Search**. The form runs a custom Terms & Connectors search through the applicable database on *lexis.com*. The results are displayed in the *lexis.com* interface window.

Guided Search Forms save you the time and effort of figuring out the proper Terms & Connectors formulation for your research. This makes the Guided Search Forms a great resource if you are not a highly experienced user. They save research time and increase efficiency with easy-to-populate forms for searches of cases, statutes, rules, and analytical content.

You can find Guided Search Forms in Time Matters and *lexis.com*. The forms in this application are unique and are predefined to work more specifically with the task-based functions of Time Matters.

Accessing Guided Search Forms

The steps that follow are used to display only one example of a Guided Search Form. There are multiple Guided Search Forms, and all are accessed in the same or a similar manner—via the Time Matters navigators.

To Access a Guided Search Form

1. On the Investigate navigator, click **Search Jury Verdicts & Settlements**. The Search Jury Verdicts & Settlements Tasks and Sources list opens.



2. Click **Search For Parties** in the Tasks list. The Guided Search Form opens.

3. Select a jurisdiction and date, enter the Terms (e.g., Smith), and click **Search**. The results are displayed based on the search data entered.

Source: [Legal > /... /> TX Jury Verdicts & Settlements, Combined](#) ⓘ
Terms: [\(smith\)](#) [\(Edit Search\)](#) [\(Suggest Terms for My Search\)](#)
View: Cite
Date/Time: Friday, June 9, 2006 - 11:00 AM EDT


↑
Search Data

Checklists

Checklists help you assign tasks and due dates and record the completion of work by associating Events and ToDo's with tasks. Many Checklists are based on LexisNexis Practice Guides.

You can import Checklists into Time Matters as Outline records, allowing you to associate each item (element) with an action, Event, ToDo, or other record. You can also assign staff members to perform the tasks.

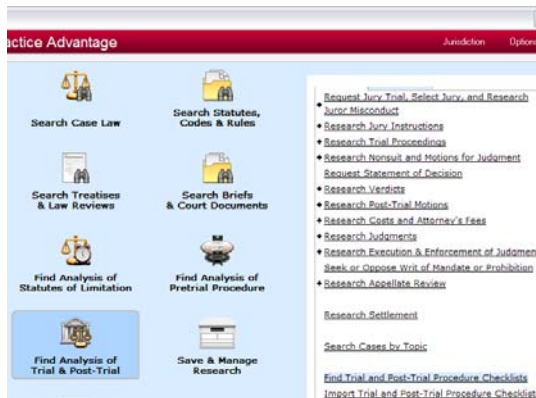
Checklists are found in all practice areas and are grouped under various research topics (i.e., **Legal Research > Find Analysis of Trial & Post-Trial > Import Trial and Post-Trial Procedure Checklists**).

 You can identify Total Practice Advantage Checklists among other Checklists in a Tasks list by remembering that **Import** is the first word and **Checklists** is the last word in a Total Practice Advantage Checklist.

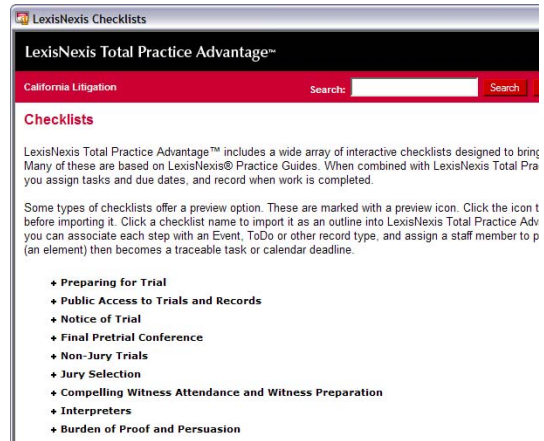
To Access Checklists

Based on your Jurisdiction/Practice Area, access to Checklists may vary. The following procedure demonstrates one way to display a Checklist.

1. On the Legal Research navigator, click **Find Analysis of Trial & Post-Trial**. The Find Analysis of Trial & Post-Trial Tasks list opens.



2. Select **Import Trial and Post-Trial Procedure Checklists**. The Checklist window opens.
3. Select the appropriate Practice Guide from the list of guides (i.e., Jury Verdicts).



4. Click on the applicable Checklist (i.e., Checklists: Challenging General and Special Verdicts) from the list.
5. Click the **Preview** button to display the Checklist.
6. Click the **Open This** button at the top of the screen. The "Checklist to Outline" screen opens.
7. If you would like to import the checklist as an Outline, click **Yes**. The Outline Form opens, displaying the elements of the outline.

8. Right-click on a list item (element), choose **Associate > With New Record** and select the Record Type (Event, ToDo, or other) that will be associated with the Checklist. The form for the record type that you selected opens.

When the association is created between the Checklist and the record type that you selected, it becomes an actionable activity.

9. Complete all required fields in the form, and click **Save & Close** as applicable to close all forms.
10. Close the Checklists.

Appendix D—Completing HotDocs Automated Forms

Automated Forms are interactive graphical or word processing templates that help you complete forms or customize documents in a fraction of the time it normally takes. Using Automated Forms eliminates repetitive typing, improves productivity, and streamlines document production.



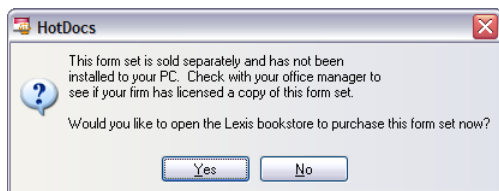
The navigator features discussed here may vary from those in your installation of the software. Your navigators include features that are relevant to the jurisdictions and practice areas in your subscription.

Using Automated Forms

LexisNexis Total Practice Advantage links to, and integrates with, sets of HotDocs Automated Forms. Some Automated Forms are included with various versions of Total Practice Advantage. You can access these forms by clicking task links that include the phrase “Automated by HotDocs.”

Some Total Practice Advantage versions also include links to Automated Forms that are installed by customers on their own local networks or PCs. If a locally installed set of forms is supported in your version of Total Practice Advantage, you will see links that include the phrase “Local Form Set - Automated by HotDocs.” Clicking this link opens HotDocs player to the locally installed set of forms.

If a form set is not locally installed on your local network or PC, when you click the link to access the form(s), the following message is displayed:



HotDocs Word Processor Forms

Client and case-specific information necessary to complete the document is gathered in dialog windows and then merged directly into the text of a Microsoft Word or WordPerfect document.

Repetitive typing is eliminated. HotDocs performs needed calculations, deals with overflow problems, and provides drafting guidance through the resource pane. After you assemble a document, you can view it in your word processor and edit the text. Completed forms can be printed and saved.

HotDocs Graphical

Graphical forms are static—the underlying text cannot be changed or modified. Client and case-specific information needed to complete the document is gathered in dialog windows and then merged directly into fields on the face of the form. Alternatively, you can fill out the form by tabbing through the fields and typing information in each field. Completed forms can be printed and saved.

To Assemble a Document

1. Open the graphical, Word or WordPerfect file you want to complete.
2. When the Answer File window appears, the default selection is **New Answer File**.
 - a. Click on the **Select Answer File** icon to the right of the drop-down window to use an existing answer file.
 - b. Click on the **New Answer File** icon to create an empty, untitled answer file.
 - c. Optionally, select **Remember selected answer file**.

This causes the same answer file to be suggested for every interview, so you don't have to select it manually each time a document is assembled. You can choose a different answer file.

3. Click **OK**. The assembly window appears, showing answers from the selected answer file in the corresponding answer fields. When you assemble a document, the interview appears in the HotDocs assembly window. Most templates include questions that have been arranged into related groups called dialogs.
 - The left pane of the assembly window, the **Interview Outline**, shows your progress through the interview. You can click a dialog title to move to that dialog in the interview.
 - The right pane is the **Dialog Pane**. Here you enter your answers to complete the assembly.
 - Some questions or dialogs might include information to help you in answering the questions. If such information is included, the resource pane (directly below the dialog pane) displays the information.

If the resource pane is not visible, select **Resource Pane** (View menu) or click the **Resource** button. You can change the size of the resource pane by selecting the top border of the pane and dragging it up or down.
 4. At the assembly window, select a dialog from the interview outline. The dialog pane changes to show the questions in that dialog.
 5. Click in an answer field. That field becomes active and allows you to enter your answer.
 6. Move to another answer field by:
 - Pressing TAB (moves to the next answer field)
 - Press SHIFT + TAB (moves to the previous answer field)
 - Clicking another answer field in the dialog
 7. Move to another dialog by:
 - Pressing ENTER
 - Pressing PAGE UP to move to the previous dialog, or PAGE DOWN to move to the next dialog
 - Clicking a button in the navigation bar, located at the bottom of the dialog pane.
 - Selecting another dialog in the interview outline.
-

To Enter a Series of Answers

Some dialogs gather a list of information instead of a single answer and repeatedly display the same questions. You provide answers for these repeated dialogs, as with other dialogs.

After providing all the necessary sets of answers, you can move to the next dialog in the interview by leaving all of the answer fields blank, then press **ENTER** or **Page Down**. You can also use the mouse pointer to select another dialog, or click one of the buttons in the navigation bar.

To Use Answers From an Answer Source

1. In a dialog that includes a **Select** button, click the **Select** button. A pop-up interview containing a spreadsheet of answers included in the answer source appears.
 2. Optionally, modify answers in the answer source as follows:
 - a. Add new answers by selecting a blank row in the spreadsheet and clicking **Edit Row**.
 - b. Edit existing answers by selecting the row you want to edit and clicking **Edit Row**.
 - c. To remove answers from the answer source, select a row and click **Delete Row**.
 3. Select the desired set of answers from the list, and then click the **Select** button. The assembly window appears again with the selected answers shown in the answer fields.
-

Preview a Completed Document

After entering answers in the interview, you can print or save the completed document, or attach it to an email message. Before doing any of these tasks, you can view the assembled document in the assembly window to ensure that the information is accurate.

To Preview a Word-Processor Document

1. Click the **Document Preview** tab at any time during assembly. The assembly window changes to show a preliminary version of the document.
 2. Scroll through the document to verify that the information you have provided is correct.
 3. Answers are shown merged into the document text. To change an answer, click the **Interview** tab and navigate to the appropriate dialog.
-

To Preview a Graphical Document

1. Click the **Form Document** tab at any time during assembly. The assembly window changes to show the form document.
2. Scroll through the document to verify that the information you have provided is correct.
3. Answers are shown in answer fields. To change an answer, select the field and type the new information.

Changing answers at the Form Document tab (instead of the Interview tab) is referred to as direct-fill assembly. Some form templates require direct-fill assembly for some or all answers.

To Use the End of Interview Dialog

The **End of Interview** dialog appears after the last dialog in each interview. Unanswered questions are reported at the top of the dialog. Below, there are buttons for working with your document.

Working With Your Document

1. When the assembly window closes, HotDocs might ask if you want to save the assembled document.
 - a. If you already sent the document to the word processor or HotDocs Filler or saved it in a file, there is no need to save the assembled document again.
 - b. You can select **Don't ask me about saving again**, and click **Don't Save** to prevent HotDocs from asking each time you close the assembly window.

2. For Word-Processor Documents
 - a. In the End of Interview dialog, click the **Send the assembled document to Microsoft Word (or Corel WordPerfect)** icon.
 - b. The completed form will appear in the selected word-processor format.
 - c. You can then print the form and/or save the completed form on your computer.
 3. For Graphical Documents
 - a. In the End of Interview dialog, click the **View the assembled form document at the Form Document tab** icon.
 - b. The completed form will appear. You can then print the assembled form.
 - c. To save the completed form as a PDF, click **File > Save Document As**.
-

To Save an Answer File

1. At the assembly window, click the **Save Answers** button. The Save Answer File dialog box appears.
 2. Select an answer type from the drop-down list.
 - a. Standard answer (.ANS) files allow answers to be used in other HotDocs interviews.
 - b. XML answer (.ANX) files can be used in other HotDocs interviews and can also be used to deliver information to a database, third-party application, or Internet site.
 3. Provide a file name, title, and optional description for the answer file. This information will appear in **Answer File Manager**.
 4. Click **OK**. The answer file is saved.
-

To Print a Completed Document

1. At the assembly window, click the **Document Preview** tab (or for form templates, the **Form Document** tab). The assembly window shows a preview of the document.
 2. Click the **Print Document** button on the toolbar. The document is sent to the specified printer.
-

Open a Saved Document

Once a document is saved, it no longer functions as an automated template. If you want to change an answer, you must manually locate each place that answer appears in the document. Also, if the answers you change were part of a calculation, you must manually recalculate the results. If you must change answers in an assembled document, it is recommended that you reassemble the document using the original answer file and make your changes during assembly.

After completing a document and saving it, you can later edit the document in the appropriate application.

- Text documents are saved as word-processor files (.DOC, .WPD, or .RTF). To edit these files, you must use a word processor.
- Graphical form documents are saved as HotDocs form files (.HPD or .HFD). To edit these files, you must use HotDocs Filler.

Appendix E—Practice Area Customization

LexisNexis Total Practice Advantage is customized for many areas of practice. This customization makes the interface familiar and immediately useful to practitioners in these specialized areas of law. Each practice area version of the product includes different customized features.

The practice areas covered in this manual are:

- Bankruptcy
- Estates Practice
- Family Law
- General Practice
- Litigation
- Personal Injury
- Social Security
- Worker's Compensation

The following pages provide a summary of different features that have been customized for each of these practice areas. Please refer to the LexisNexis Total Practice Advantage online Help for information not covered in this manual.

Bankruptcy

LexisNexis Total Practice Advantage for Bankruptcy includes practice management functions, links to bankruptcy-related content on *lexis.com*, and an integration with Collier TopForm™ petition preparation software. Basic practice management functions are enhanced with unique functionality using customized:

- Contact and Matter Forms, with associated Classification Codes for each form type
- Document Templates (Formattable Clipboards)
- Chain Templates, Outlines, and AutoEntry Forms
- Quick Tabs, Power Views, and a customized toolbar

Each of these features is summarized below.

Bankruptcy Contact and Matter Forms

Form Type	Customized Classification Code(s)
Contact	CDTR —Creditor; CRT —Court Clerk/Court; DEBT —Debtor; JUDB —Bankruptcy Judge; PCLI —Potential Client; SCDT —Secured Creditor; TRSE —Trustee
Matter	BNKR —Banker

Document Templates—Uses the Formattable Clipboard feature to copy and format selected data fields from the Contact and Matter records, and insert them into documents such as:

- Agreements; Applications; Letters, Motions; Notices; Orders; Requests; Statements

Chain Templates—Used to apply a pre-designed chain of tasks to a given case, over a selected time period. Common Bankruptcy practice chain of events that can be used for each firm are:

- Filing the Petition; Scheduling the 341; Events based on first date of the 341; Events based on actual date of the 341; Initiating the Chapter 13 Plan; Completing the Chapter 13 Plan

Outlines and AutoEntry Forms—When you create a new Outline record, you can select one of these AutoEntry forms to automatically complete the outline area of the record form.

Quick Tabs—Provides quick access to different filters and views of the current list. Allows you to sort your Bankruptcy Matters according to where each case stands in the Bankruptcy process.

Power View—The Bankruptcy Power View displays the most critical information, including key contacts, important dates, and the current phase of a Bankruptcy Matter.

Toolbar—A customized main toolbar includes Outline and Chain Template buttons, making it easier to access those custom features.

Estates Practice

LexisNexis Total Practice Advantage for Estates Practice includes customized features to provide unique functionality. Customized features include:

- Contact and Matter Forms, with associated Classification Codes for each form type
- An Estates Practice Power View
- AutoEntry Forms and Triggers
- Chain Templates
- Custom Links and a customized toolbar

Each of these features is summarized below.

Estates Practice Contact and Matter Forms

Form Type	Customized Classification Code(s)
Contact	ACCT —Accountant; ATTY —Attorney; BENE —Estates Beneficiary; BNKR —Banker; DCTR —Doctor; ESTC —Estates Contact; ECL —Estates Practice Client; EXEC —Estates Executor; HEIR —Heir; FIN —Financial Advisor; GUA —Guardian; INS —Insurance Agent; PETG —Guardianship Petitioner; PROX —Healthcare Proxy; REAG —Real Estate Agent; TRST —Estates Admin Trustee
Matter	CNSV —Conservator; ESTP —Estates Planning; ELD —Elder Law and Guardianship; GRD —Guardianship; PROA —Probate and Administration

Customized Power View—LexisNexis Total Practice Advantage for Estates Practice includes a single customized Power View.

AutoEntry Forms and Triggers—With LexisNexis Total Practice Advantage for Estates Practice, an Event AutoEntry Form is created when a new potential client is added using the **PCLI** Classification Code.

Chain Templates—LexisNexis Total Practice Advantage for Estates Practice provides three Chain Templates that guide you through completing new Estate Planning Matters, new Medicaid Planning Matters, and new Probate/Administration Matters.

Custom Links—Estates practitioners have other applications and Web sites that they frequently use. LexisNexis Total Practice Advantage for Estates Practice makes it easy to access these resources through a custom navigator or a custom link.

Toolbar—A custom main toolbar includes Chain Template and other buttons, making it easier to access Estates practitioner’s custom features.

Family Law

LexisNexis Total Practice Advantage for Family Law provides Family Law practitioners with a set of packaged features, which includes a set of customized Contact, Matter, and Event forms.

These customized features are summarized below.

Form Type	Customized Classification Code(s)
Contact	-CLI —General Practice Client
Matter	-CSV —Conservatorship; -DIV —Divorce; -DOM —Domestic; -GRD —Guardianship; -JUV —Juvenile Criminal
Event	-DEP —Deposition

Litigation

LexisNexis Total Practice Advantage for Litigation provides Litigators with a set of packaged features, which includes a set of customized Contact, Matter, and Event forms and Classification Codes.

These customized features are summarized below.

Form Type	Customized Classification Code(s)
Contact	-CLI —General Practice Client; PCLI —Potential Client
Matter	-CIV —Civil; -CRI —Criminal; DOM —Domestic; -DUI —Driving While Under the Influence; EMP —Employee; -JUV —Juvenile Criminal
Event	CONF —Conference; CONS —Consultation

AutoEntry Forms and Triggers—During initial consultation, an Event AutoEntry Form will be triggered when a contact is marked as a new potential client using the **PCLI** Classification Code.

General Practice

Time Matters for General Practice includes a set of features to provide unique functionality. Customized features include:

- Event, ToDo, Contact, and Matter Forms
- Chain Templates
- AutoEntry Forms, Triggers, and Outlines
- Quick Tabs, Power Views, and Toolbars

Each of these features is summarized below.

General Practice Contact, Matter, Event, and ToDo Forms

Form Type	Customized Classification Code(s)
Contact	-CLI —General Practitioner Client; BENE —Beneficiary; CLPI —PI Client; CNSV —Conservator; DEF —Defendant; DMS —Domestic Party; ESTC —Estates Contact; EXEC —Executor; GUA —Guardian; HEIR —Heir; PCLI —Potential Client; PETG —Guardianship Petitioner; PLA —Plaintiff; PROX —Proxy; PRPI —PI Prospect; SPOU —Spouse; TRST —Trustee.
Matter	BUS —Business Formation; CIV —Civil; CRI —Criminal; CSV —Conservator; DIV —Divorce; DOM —Domestic; DUI —Driving Under the Influence; ELD —Elder; EMP —Employment; EST —Estates; GRD —Guardianship; JUV —Juvenile; PI —Personal Injury; PRO —Probate; RE —Real Estate.
Event	DEP —Deposition
ToDo	\$MED —Medical; \$LW —Lost Wages; \$PRO —Property Damage

Chain Templates—Used to apply a pre-designed chain of tasks to a given case, over a selected time period (i.e., New Estate Planning, Medicaid Planning, Probate/Admin Matter).

AutoEntry Forms and Triggers— An Event AutoEntry Form is triggered when you add a new client meeting using the **PCLI** Classification Code.

Outlines—Predefined outlines are stored as AutoEntry Form Templates, which are partially completed record forms that you can use as the basis for new records.

Quick Tabs—Provides quick access to different filters/views of the current list.

Power View—The “Related Contacts” power view displays critical Contact record information.

Toolbar—Time Matters for General Practice uses the standard toolbar as well as the Personal Injury and Estates Practice toolbars.

Personal Injury

Time Matters for Personal Injury includes a set of customized features, packaged to provide unique functionality that utilizes a customized set of:

- Event, ToDo, Contact, and Matter Forms
- Chain Templates
- Outlines and Checklists
- Quick Tabs, Power Views, and a customized Toolbar

Each of these features is summarized below.

Personal Injury Contact, Matter, Event, and ToDo Forms

Form Type	Customized Classification Code(s)
Contact	CLPI —Personal Injury Client
Matter	-PI —Personal Injury Client
Event	DEP —Deposition
ToDo	\$MED —Medical; \$LW —Lost Wages; \$PRO —Property Damage

Chain Templates—Used to apply a pre-designed chain of tasks to a given case, over a selected time period.

Outlines and Checklists—LexisNexis Total Practice Advantage for Personal Injury has a number of predefined outlines based on task checklists commonly used by Personal Injury practitioners. These are stored as AutoEntry Form Templates, which are partially completed record forms that you can use as the basis for new records. When you create a new Outline record, you can select one of these AutoEntry forms to automatically complete the outline area of the record form.

Quick Tabs—Provides quick access to different filters/views of the current list. Allows you to sort your Personal Injury Matters according to sub-categories.

Power View—The Personal Injury Power View displays the most critical information, including key contacts, important dates, and damages. A separate detailed Damages power view is also included.

Toolbar—A custom main toolbar includes Chain Template and other buttons, making it easier to access those custom features.

Social Security

Time Matters for Social Security provides Social Security practitioners with a set of packaged features, which includes a set of customized:

- Event, Contact, and Matter Forms
- Quick Tabs

Each of these features is summarized below.

Social Security Contact, Matter, and Event Forms

Form Type	Customized Classification Code(s)
Contact	ALJ —Administrative Law Judge; CLMT —Social Security Claimant; DDS —DDS/Adjudicate; MEDP —Medical Provider; MJ —Magistrate Judge; MODU —Module; ODAR —Office of Disability Adjudication and Review; PC —Payment Center; SSA —Social Security Administration
Matter	.SS —Social Security
Event	.HRG —Hearing

Quick Tabs—Provides quick access to different filters/views of the current list. Allows you to sort your Social Security Contacts and Matters according to sub-categories.

Worker’s Compensation

LexisNexis Total Practice Advantage for Worker’s Compensation provides Worker’s Compensation practitioners with a set of packaged features for both Applicant and Defense firms, which includes a set of customized Contact, Matter, and Event forms.

Each of these features is summarized below.

Form Type	Customized Classification Code(s)
Contact	ADJ —Insurance Adjuster; CARR —Insurance Carrier; IME —Independent Medical Examiner; QME —Qualified Medical Examiner; WCC —Worker’s Compensation Commissioner
Matter	WCD —Worker’s Compensation Defense; WC —Worker’s Compensation
Event	Status Call AutoEntry forms using the .CRT —Court form

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