

## **Time Matters Link v. 1**

Reviewing all the suggestions, the following is what I suggest that we include in Version 1 of the TM Link. There were many other very good features to consider. However, we have some very controlling needs here:

- A tight deadline if we are going to have this ready for NY LegalTech.
- The TM API will be new to the TV developers ... this will let them cut their teeth without getting overly complicated (e.g., Contact synchronization), and learn about how TM works and how the TM database is laid out.
- We need to show that we can really pull this off ... a smaller set of the more important solutions is more important than trying to stuff too much in the link.
- We can get customer feedback on the new features ... this will help us polish what we have in version 1, and broaden the base of day to day users who can then provide additional, real world suggestions.

### **Adding Records**

#### **Record Types to Add**

There seem to be 4 types of Time Matters records that would most likely be added:

- Phone
- Billing
- Document
- ToDo

While these are the most likely, the Time Matters API makes it such that if you have already done the programming to allow the addition of one type, adding other record types is a trivial task. That said, I think we can eliminate the following of the 13 record types:

- Outline
- Custom Forms
- Matters
- Web
- Mail

- Email

That leaves the following records types that we might want to consider being able to add, but would be best left for Version 2, if at all:

- Events
- Contacts
- Notes

### **Where are the Records Added From?**

In looking at how the record types are added, let's look at the TV to see where records would first be added from:

- Call Log
- Call Monitor
- Inbox
- This is important as there are certain characteristics in some of the areas that may not be in the others ... incoming/outgoing, associated message, etc.

### **How records are added**

There are 3 ways that a record should be able to be added

- Right click from TV record
- Icons on a toolbar. I would suggest using icons very similar to what TM uses, but with a plus button. Here is an example:



- Keyboard shortcut acting on the currently selected record. If you use keyboard shortcuts, it would be nice to track the TM shortcuts:
  - Ctrl-Shift-T – ToDo
  - Ctrl-Shift-D – Document
  - Ctrl-Shift-B – Billing
  - Ctrl-Shift-P – Phone
  - Ctrl-Shift-V – Events

- Ctrl-Shift-C – Contacts
- Ctrl-Shift-N – Notes

### What a TM record Looks Like

While each record type has some fields that are different from the others, there are a lot of consistencies that can be completed from the data that is in TV. Here is Phone record. Note that Area 1 ... the top area of data ... is almost 100% common with all the data types that we are going to want to add:

The screenshot shows a 'Phone Call - Add' window with the following fields and options:

- Date:** 12/13/2008
- Time:** Tue 2:06am-2:06am
- Duration:** 0:00:24
- Code:** [Empty]
- Subject:** [Empty]
- Staff:** RSBIRobert S Brown
- Regarding:** Barry B. Able
- In From:** Able v. State of Florida
- To:** TM
- Phone1:** [Empty]
- Phone2:** [Empty]
- Phone3:** [Empty]
- Reminders:**  Follow  Done  Notify  Hide  Trigger  Review  Billable  Private  Status
- Send To:** TM
- From:** TM
- Message:** Phone Call from -
- Options:**  Read  Unread  Personal  Hold  Urgent  On Hold  Call Back  Returned  Will Call

### Fields in Common

With the exception of the Contact record, all the records that we would consider adding share the following fields:

- Date
- Time (Start and End time)
- Duration
- Classification Code

- Desc/Subject
- Staff
- Client
- Matter/Case
- Memo
- 8 User Defined fields

We can make some assumptions that can be hard coded with no need for user interaction, configuration or setup. The following TM fields would be populated with information from TV:

<u>TM Fields</u>	<u>TV Values</u>
Date	Start Time (Date part)
Time	Start Time (Time part)
Duration	Duration
Memo	Notes (maybe ... see below)

The other fields would require user interaction, configuration or setup as follows:

### **Classification Code**

Each TM record can be given up to five, 4 character Classification Codes. The codes are user defined, and change widely from TM site to TM site. Below are some examples of general codes:

- Contact – CLIE (Client), ATTY (Attorney), JUDG (Judge)
- Phone – CLIE (Client call), SETT (Settlement call)
- Document – BRIE (Brief), CORR (Correspondence), WILL (Will)

When a TM record is added from TV, I can see users wanting to be able to have a Code automatically added by default when the record is added. Here are examples of how I can see this working:

- Add Document from the Inbox (Recorded call) – Code = RCAL (Record Call)
- Add Document from the Inbox (Voice mail) – Code = VMAI (Voice Mail)

- Add Billing Record – Code = PCON (Phone Conference)
- Add Phone Record from Incoming call – Code = INCO (Incoming Call)
- Add Phone Record from Outgoing call – Code = OUTG (Outgoing Call)
- Add ToDo from Incoming call – Code = RETC (Return Call)
- Add ToDo from Outgoing call – Code = FCAL (Follow up on Call)

The point is that because TM users can create their own codes, we can't hard code them. We have to have a setup routine where the codes are matched. Here is an example of a sample dialog:

The image shows a dialog box titled "Codes" with a light gray background. It contains seven rows, each with a text label on the left, a dropdown menu in the middle, and a small button with an up arrow on the right. The labels are: "Add Document from the Inbox (Recorded call)", "Add Document from the Inbox (Voice mail)", "Add Billing Record", "Add Phone Record from Incoming call", "Add Phone Record from Outgoing call", "Add ToDo from Incoming call", and "Add ToDo from Outgoing call".

The TM API allows access to the various codes which can be loaded into a dropdown list, or some type of lookup dialog.

**Desc/Subject**

This is a line of up to 100 characters that we will want filled in when a new record is added. Here are some simple examples:

- Billing – Telephone conference with
- Phone - Phone conference with
- Document – Voice mail of message from
- ToDo – Return call from

Where this line can get fancy and quite helpful to the end user is if we can introduce the concept of what TM calls “tokens.” Each data element in TV is a token. For example, the following elements in TV could be available as follows:

- {Start Time}
- {Duration}
- {From}
- {From Number}
- {Answered By}
- {Account Code}
- {Callback Number}

Tokens would also include any information from the CallerID info.

Depending on the level of difficulty, tokens could be available for any information from an Associated TV Contact. If this is too difficult, push it into Version 2. A suggestion for an Associated Contact would be (this matches TM field naming conventions):

- {CON:Name}
- {CON:Title}
- {CON:Company}
- {CON:PIN}

Once we have setup what info in TV is available by token, the Desc/Subject lines look like the following:

- Billing – Telephone conference with {Calling Party}
- Phone - Phone conference with {Calling Party} {Location} on {Date} – {Number}
- Document – Voice mail of message from {Calling Party}
- ToDo – Return call from {Calling Party} / {Location} / {Return Number}

Here is what a configuration screen might look like:

Description & Subject Fields	
Billing Description - Incoming Call	Telephone conference with {From}
Billing Description - Outgoing Call	Telephone conference with {To}
Phone Subject - Incoming Call	Phone conference with {From} on {Start Time} - {Callback Number}
Phone Subject - Outgoing Call	Phone conference with {To} on {Start Time} - {To Number}
Document Description - Voice Mail	Voice mail of message from {From} - {Start Time}
Document Description - Recorded Call	Recording of phone call from {From} - {Start Time}
ToDo Description - Incoming Call	Return call from {From} - {Callback Number}

The field values can be typed in by the user, using the Tokens that we define.

### **Staff & User**

You already have a User field in the current TM Link. We would want to add a Staff field.

Better yet, we might want to do some type of matching at the system level (see below for what I mean by system level) between TV Users and TM Users/Staff. Below is a screenshot of how TM handles this with a matching between TM Staff and Outlook users (mocked up a little to look like a TV match):

**Outlook Link Options - Staff Options**

**Match Time Matters Staff to TeleVantage Names**

Highlight the Address Book Name on the left list, then highlight the Time Matters Staff on the right list. Press the Match button when the two to be matched are highlighted.

TeleVantage Users	Match	Time Matters Staff
Carolyn Meeks (cmeeks@...)		Albert A Howell
Catherine Bennett (catheri...)		Allison S Monroe
Diane Abraham (diane@d...)		Barbara E Angella
Gino Augustino (ginoa@m...)		D Brickley
Huang Tran (Huang@Cha...)		Dan T. Miller
Jay Thorpe (thorpe@aaic...)		David B Halomar
Jeremy Baird (jeremy@bair...)		Marilyn C Campos
Marilyn Campos (marilyn@...)		Marshall B Addison
Nigel English (nigle@att...)		Michael Arlington
Robert Brown (rsb@brown...)		Rebecca S James
Suzie Cooper (suzie@ACM...)		Robert S Brown
Therelius Baxter (thad@Fv...)	Robert Brown (rsb@brownca...)	Victor C Marshall
Tomas Title Insurance Cor...	Victor Marshall (vcmm@brown...)	Video Conf. Room
Victor Marshall (vcmm@bro...)		
Vivian Brown (vivianb@fas...)		
Walter Sufouri (sufouri@at...)		
Wayne Allen (wallen@ga.r...)		

Buttons: Match >>, << Un-Match, Help, OK, Cancel

Then, when a TV User adds any of the record types, the Staff field in TM gets the corresponding TM Staff.

### **Client / Matter-Case**

Client and Matter/Case fields make up what is called the Regarding Line in a Time Matters record. The only connection I could possibly see between these fields and TV is the TV field for {Account Code}. While it is possible that the TV Account Code would equal the Matter/Case code, there are all sorts of validation issues that could cause problems.

In version 2, I'd like to explore the possibility to what Time Matters calls auto-matching when handling email. If I open an email, TM quickly searches all the Contacts and Matters for email addresses equal to the sender's email address, and pulls up a dialog showing possible matches. Likewise, we might be able to do a quick search of the TM Contacts and Matters trying to find matches for phone numbers that then would let the user choose from a list of matching Contacts and Events. Even though the TAPI implementation does some of this, we might need an API change for this to happen.

### **Memo**

Each record has a memo field that holds considerable information. At first glance, one would think this should be a hard coded field to the TV {Notes} field. But, for maximum flexibility, we might want to let the user define what goes in the TM Memo field using tokens. Here are a few examples:

- {Notes}
- {Start Time} / {Duration} / {From} / {From Number} / {Answered By} – {Notes}

In this manner, the user can define whatever they want for the Memo in TM.

### **User Definable Fields**

Most Time Matters records that we are concerned with have at least 8 user definable fields. They could be used to store some of the TV tokenized information that doesn't fit anywhere else.

Use a screen like the ones above that let's us place tokens in any of the 8 user definable fields.

## Call Log – Left Message / Adding Multiple Records

When you create any type of record from the Call Log, there is a “Left Message” field. This means that TV is already associating a Voice Message with a call, or at least is making a note that it exists. If it is possible to know which voice message is related to a particular call, then it would be nice to have the option to create a Document record for that message when any other type of record is created.

For example, let’s say a call is highlighted and the Add Phone record button is pressed. A TM Phone record is going to be added. But, does a TM Document get added? The way TM would handle this would be to have User settings on how to handle it:

Add Phone with Message - Add Document record?	<input type="radio"/> Always	<input type="radio"/> Never	<input type="radio"/> Prompt
Add ToDo with Message - Add Document record?	<input type="radio"/> Always	<input type="radio"/> Never	<input type="radio"/> Prompt

You would have a line item for each type of record you could add. If they choose “Prompt” then the following type of dialog would come up when the primary record is added:



This let’s the User add two records with one action.

If the two records are added, they should be “Specifically” related to one another. This is a concept in TM where two records are related to one another, even if they don’t share the same Client and Matter information. The API allows for this.

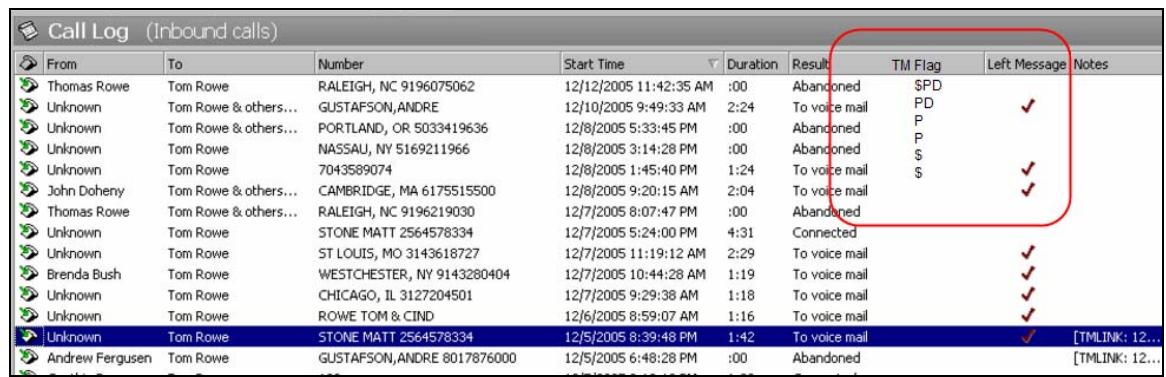
Along the same lines, we might consider letting the User specify they want to create a billing record with all Phone records (or other records) added.

## Visual Indicators

When a record is added, there needs to be some entry in TV to indicate the action taken. You already have this in the TM Link when you drop information into the Notes field that a TMLINK has taken place.

Instead of the writing that you use, you might consider simply using a few keys. For example, if a Billing Record, Phone Record and Document record are created from a single call in the Call log, place “\$PD” in a column specifically for this purpose – maybe a TM\_Flag field. A user can then look at that field and see that a particular call has been billed, and phone and document records have been added.

Here is an example of what this might look like:



From	To	Number	Start Time	Duration	Result	TM Flag	Left Message	Notes
Thomas Rowe	Tom Rowe	RALEIGH, NC 9196075062	12/12/2005 11:42:35 AM	:00	Abandoned	\$PD		
Unknown	Tom Rowe & others...	GUSTAFSON, ANDRE	12/10/2005 9:49:33 AM	2:24	To voice mail	PD	✓	
Unknown	Tom Rowe & others...	PORTLAND, OR 5033419636	12/8/2005 5:33:45 PM	:00	Abandoned	P		
Unknown	Tom Rowe	NASSAU, NY 5169211966	12/8/2005 3:14:28 PM	:00	Abandoned	P		
Unknown	Tom Rowe	7043589074	12/8/2005 1:45:40 PM	1:24	To voice mail	\$	✓	
John Doheny	Tom Rowe & others...	CAMBRIDGE, MA 6175515500	12/8/2005 9:20:15 AM	2:04	To voice mail	\$	✓	
Thomas Rowe	Tom Rowe & others...	RALEIGH, NC 9196219030	12/7/2005 8:07:47 PM	:00	Abandoned			
Unknown	Tom Rowe	STONE MATT 2564578334	12/7/2005 5:24:00 PM	4:31	Connected			
Unknown	Tom Rowe	ST LOUIS, MO 3143618727	12/7/2005 11:19:12 AM	2:29	To voice mail		✓	
Brenda Bush	Tom Rowe	WESTCHESTER, NY 9143280404	12/7/2005 10:44:28 AM	1:19	To voice mail		✓	
Unknown	Tom Rowe	CHICAGO, IL 3127204501	12/7/2005 9:29:38 AM	1:18	To voice mail		✓	
Unknown	Tom Rowe	ROWE TOM & CIND	12/6/2005 8:59:07 AM	1:16	To voice mail		✓	
Unknown	Tom Rowe	STONE MATT 2564578334	12/5/2005 8:39:48 PM	1:42	To voice mail		✓	[TMLINK: 12...
Andrew Ferguson	Tom Rowe	GUSTAFSON, ANDRE 8017876000	12/5/2005 6:48:28 PM	:00	Abandoned			[TMLINK: 12...

## User Level / Program Level Settings

I am assuming that when I am logged in as a TV user, I have access to both User level settings and Program Level settings. All the settings that have been discussed above should be able to be set at a Program Level and then a User Level.

Take the Descriptions as an example. An administrator should be able to define Program Level descriptions, and if a User doesn't do anything under their user ID, then the Program Level values are used. If, however, the User adds their own information, then that data should override the Program Level info.

This would be mandatory for larger firms, the Vertical target market.

Here is a sample dialog:

The screenshot shows a dialog box with the following structure:

- Top tabs: Program Level | User Level (selected)
- Second level tabs: Codes | Descriptions | Staff/User | Memo | UDFs (selected)
- Section title: Codes
- List of items with dropdown menus and up/down arrow buttons:
  - Add Document from the Inbox (Recorded call)
  - Add Document from the Inbox (Voice mail)
  - Add Billing Record
  - Add Phone Record from Incoming call
  - Add Phone Record from Outgoing call
  - Add ToDo from Incoming call
  - Add ToDo from Outgoing call

## What versions of TM would you support?

I think that you would need to support Time Matters 6 and Time Matters 7.