

## Frequently Asked Questions

**I'd like to change some buttons on the Time Matters toolbar. How can I do that?**

### Customizing the Time Matters Toolbar



Buttons now on the list toolbar can be easily removed. Other buttons can be added to make it easier to access Time Matters program features that you often use.

### The List Toolbar customizing screen

From the Main menu, select **File ► Program Setup ► User Level ► Toolbar**. The List Toolbar screen will appear:

The **Available Buttons** column lists the buttons that can be added to the toolbar.

To place a separator line between groups of buttons, highlight **Separator** in the **Available Buttons** column and press the **Add** button.

To add a button to the toolbar, highlight the button in the **Available Buttons** column and press the **Add** button.

To remove a button from the toolbar, highlight the button in the right column and press the **Remove** button, or double-click on the button.

The **Preview** button will let you see what the revised toolbar will look like.

In customizing the toolbar, we recommend that you retain the **Large Icon** setting while leaving the **Show Icons as Gray** setting turned off.

The **Show on Toolbar** column lists the buttons on the toolbar. The buttons, top to bottom, are in the order that they appear on the MainToolbar, from left to right.

When done customizing the Main Toolbar, press the **OK** button.


A button or separator on the toolbar can be positioned by highlighting the button or separator, and then pressing the **Up** and **Down** buttons.

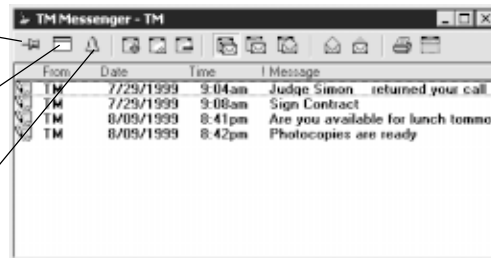
## What is the TM Messenger and how can I use it?

### Using TM Messenger

Pressing the pushpin button will keep TM Messenger on top of any open window.

Pressing this button minimizes the TM Messenger Window.


Press the Do Not Disturb button to keep from being alerted. The button will change. 



Time Matters has an easy to use intra-office instant messaging system that is intended to be used for short messages between users. The messages cannot be saved, so when they are deleted no permanent record of the message is retained.

### Activating TM Messenger

To bring the TM Messenger Window up, do any of the following:

- From the Main menu, select **View ► Messenger Window**
- Press the **Message** button on the Toolbar if it has been added
- Use the keystrokes **CTRL + M**
- Select the Messenger Icon  in the Windows System Tray in the lower right corner of the Windows Taskbar.

### Sending a Message and Responding to it


- 1** Press the **Add New Message** button .



- 2** Type the recipient's name/initials in the **To:** field, or use the **Lookup** button to select the recipient(s).
- 3** Type in your message.
- 4** Press **Send**.

If the **Urgent** button is used, it will override a recipient's activated **Do Not Disturb** button.



In the above screen, RSB has received the message “Ted is in the lobby”. He has responded by pressing the reply button  **Reply** and typing in his message.

## How do I use the Time Matters Phone Message System to notify recipients of telephone calls?

### The Time Matters Phone System

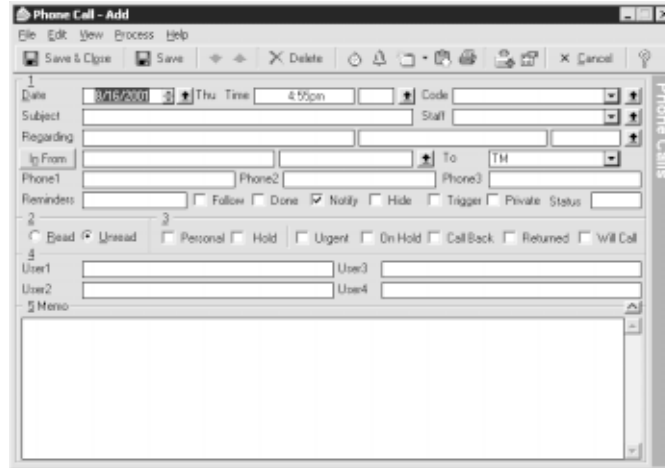
Time Matters includes a complete telephone tracking system. It can track all incoming and outgoing telephone calls and can relate those calls directly to the relevant Case or Contact.

Date	EndTime	Duration	Subject	Pivva MatRef	In/Out	File
8/16/2001	Thu 11:50am	1:70	Work over terms of Bankruptcy filing	N	Brubaker Bankruptcy	In
8/16/2001	Thu 4:55pm	0:42	Follow up on Joe's Proposal	N	Chelsea v City of Hialeah	Out
8/17/2001	Fri 11:45am	1:08	Spoke with Vivian about Brown resp.	N	Brown v Brown	In
8/17/2001	Fri 1:20pm	0:25	Discussion of upcoming case	N	Reed v Automated Machine	Out
8/17/2001	Fri 6:20pm	0:08	Called Teri to go over case	N	Lee v All County Insurance	In


To access the Phone Call list, do any of the following:

- From the Main menu, select **Database ► Phone Call List ► All Phone Calls**
- Press **F8**.
- Modify the Time Matters Main toolbar by adding the **Phone Call** button.

The Phone Call system, in conjunction with TM Messenger, can be used to notify staff of incoming phone calls. A staff member assigned to take and transfer phone messages can do the following when a telephone call is received:



**1** Open a new Phone Call form by doing one of the following:

- Use the keystrokes **CTRL + SHIFT + P**
- On the Phone Call list screen, press the **Add Record** button  or press the **Insert Key** on your keyboard.
- From the main menu, select **Edit ► Add Message**
- Right-click and select **Add Record**

**2** A new Phone Call Record will appear. At a minimum the person answering the phone should fill in the following:

- The **Staff** field (the person who answered the phone and is taking the message);
- The **In From** Field (using the **Lookup** button, if possible, and if the caller is in the Contact database).

If the caller is in the Time Matters Contact List, use the **Quick Pik** feature to locate the caller's name and related information.

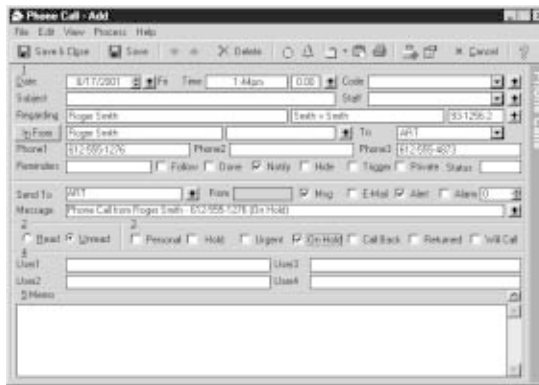
**To use the Quick Pik feature:**

- 1** Insert the cursor in the **In From** field and press **F2**.
- 2** The Contact Lookup screen will appear.
- 3** Begin typing the last name of the caller. For example, type "Smith."

**4** *How do I use the Phone Message System?*



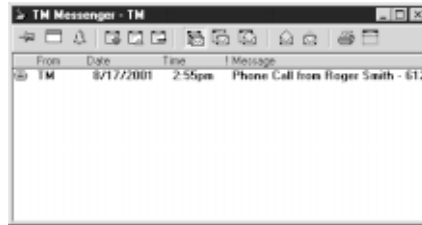
- 4 The **QuickPick** feature will immediately move down the contact list to the name “Smith.” Select the correct contact. If there is no listing for the caller press the **Add** button to add a new contact.
- 5 Press **OK** and the name and all related information will populate the new Phone Call Record form.



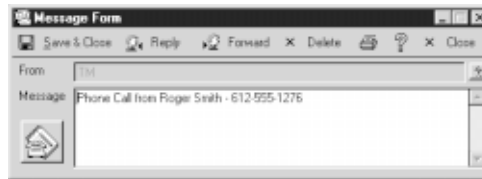
- 6 Specify the user to whom the Call is to be directed in the **To** field.
- 7 The **Notify** area (accessed from the View menu or appears automatically when the **Notify** checkbox is checked) contains the **Message** field which is automatically filled in with the name and phone number of the caller.

The **Send To** field is set automatically to correspond with the user that was designated in **To** field. It can be overridden to a different user.

- 8 Press the **Save & Close** button.  
If the **Notify** and **Msg** boxes are checked, a TM Message will be automatically generated and sent to the recipient of the call. If the **Alert** box is checked, the record of the call will be added to the recipient's Alerts, Reminders, and Watches screen.



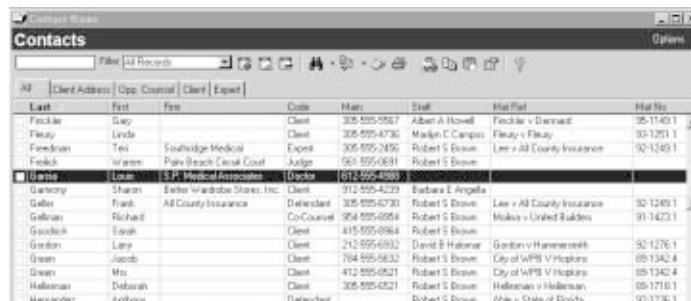
- The recipient of the call (TM) can double click on the new entry to bring up the TM Message.



If the user (TM) then clicks on the icon to the left of the message area, the Phone Record will be displayed. The user (TM) can take the call, or can use the TM Messenger to have the person who took the call take a message so that the call can be returned later.

## How can I adjust and edit columns that appear on the list screens?

You can resize columns, change the order in which they appear on the screen, and determine which fields will appear as columns in each list.



### To resize columns:

- Move the mouse cursor into the header area of the list.
- Position the cursor on a column divider and when "<->" appears, hold down the left mouse button, dragging the column to the desired width.

## 6 How can I adjust and edit columns?

Columns can be easily removed and other columns can be added to any list screen.

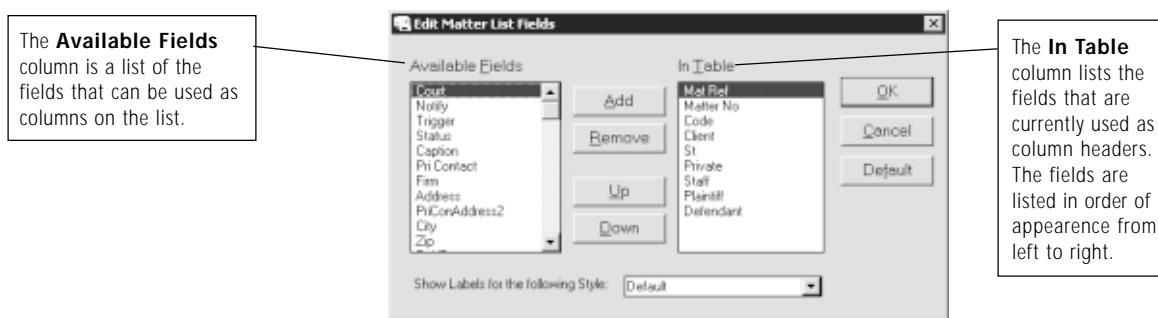
**To edit Columns:**

**1** On a List select **Edit ► Columns**.

**or**

**1** Right-click on any List **Quick Tab** and choose **Edit List Layout**.

The **Edit List Fields** screen will appear.



**2** To add a column to the List, highlight the corresponding field in the **Available Fields** column and press the **Add** button.

**3** To remove a column from the List, highlight the corresponding field in the **In Table** column and press the **Remove** button.

**4** A field that has been added as a column to the List, can be positioned on the list toolbar by highlighting the field, and then using the **Up and Down** buttons.

**5** Press **OK** when finished adding and removing columns from the List.

## **What are Quick Tabs and what are they used for?**

**Quick Tabs** are data filters that will provide selected information in a list format. An unlimited number of **Quick Tabs** can be created and permanently saved for use at any time.

**Quick Tabs can be created for any number of purposes. For example:**

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- On the Matter List, all of an attorney's civil cases to be tried in a particular court.
  - On the Billing List, all of the bills generated by any staff member.
  - On the ToDo List, all Todo's to be completed today or during the current week.
  - On the Contact List, all medical experts retained by the law firm.
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## **Why does Time Matters seem slower when Quick Tabs are used? What can be done about this?**

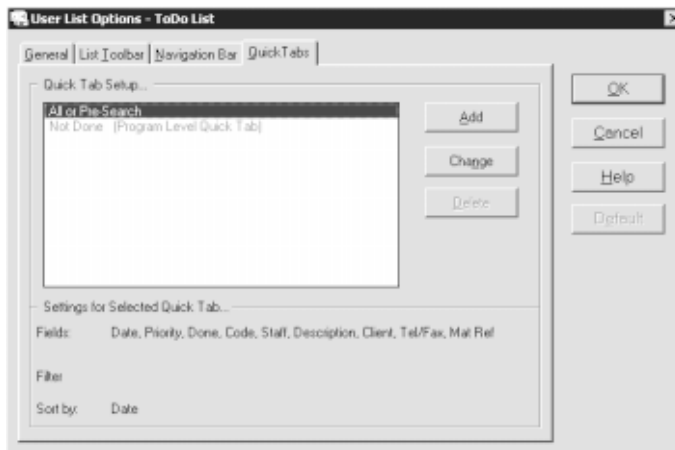
When a user is working in Time Matters with a Quick Tab selected, the program must use more of its resources to continually sort and reorder the records selected in the **Quick Tab** filtering procedure. Because of this, we recommend that **Quick Tabs** be used only for selected activities, such as to view a quick tab list, or to print off selected reports of information.

At all other times, however, the user should use the Time Matters program while the **All** tab is selected in a list screen.

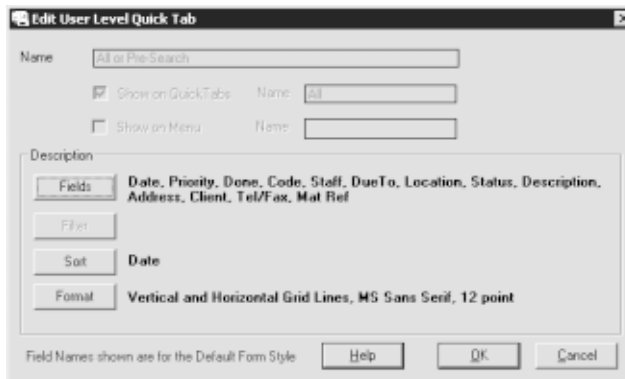
## How can I create a Quick Tab that lists my ToDos for the week?

### To create a Quick Tab that lists my ToDos:

- 1** Since the **Quick Tab** will relate to the **ToDo** List, the first step is to open the **ToDo** List.
- 2** Next, open the **User List Options** screen by:
  - Right-click on the **All** Tab and select **Edit Quick Tabs**
  - Press the **Options** button in the upper right corner of the **ToDo** List and select **Quick Tabs**
  - On the Main menu select **Edit ► Quick Tabs**



- 3** Press the **Add** button.
- 4** The **Edit User Level Quick Tab** screen will appear.



**5** Fill in the appropriate fields:

**Name** - A descriptive name that is used only for identification purposes.

**Show on quick tabs - Name** - The entry here will appear on the Quick Tab and should be short.

**Show on Menu - Name** - The entry here will cause the Quick Tab to be accessible from Time Matters Main Menu.

**6** Select **Fields** to select the columns and the order in which they will appear on the Quick Tab list (See the **FAQ** on adjusting and editing columns.)

**7** In order to retrieve list items that will include only the todos for the week, press **Filter ► Combined Filter**.

**8** The Combined Search screen will appear. On this screen do the following:

Make certain that the **Date From** and **Date To** fields encompass the appropriate seven day time period. (e.g. 08/01/2001 - 08/08/2001)

Check the **Dates are Relative to Today** box. This will cause the **Date From** and **Date To** fields to adjust each day.

In the **Staff** field, enter the initials RSB.

**9** Press **OK** in all screens. The new Quick Tab has been created and will appear on the User's Todo List screen. You can create a Quick Tab for Today, Month, etc.

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## What are the regarding fields, and what do they do?

The screenshot shows the 'Event Form - Add' window with the following fields filled in:

- Date: 8/22/2001
- Wed Time: [empty]
- Code: [empty]
- Description: [empty]
- Staff: [empty]
- Regarding: [empty]
- Reminders: [empty]
- Follow:
- Done:
- Notify:
- Hide:
- Trigger:
- Private:
- Status: [empty]

When you add any of the date dependent records you need to be able to associate them with a Contact or Matter. Client, MatterRef, and Matter No. are collectively referred to as the Regarding Fields. These three fields appear in the above screen shot, immediately to the right of the **Regarding** label.

**To link a record to the appropriate Contact or Matter, fill in one or more of these three fields by:**

- Pressing the **F2** key while in one of the three fields.
- Clicking on the up arrow to the right of the “Regarding line.”

In each instance, a lookup window will appear:

- If selected while in the Client field, the Contact list lookup will appear.
- If selected while in the Matter Reference field, the matter list lookup will appear sorted by Matter Reference.
- If selected while in the Matter No. field, the matter list lookup will appear sorted by matter number.

Related records will not be linked if the information in the regarding fields is manually entered from the computer keyboard.

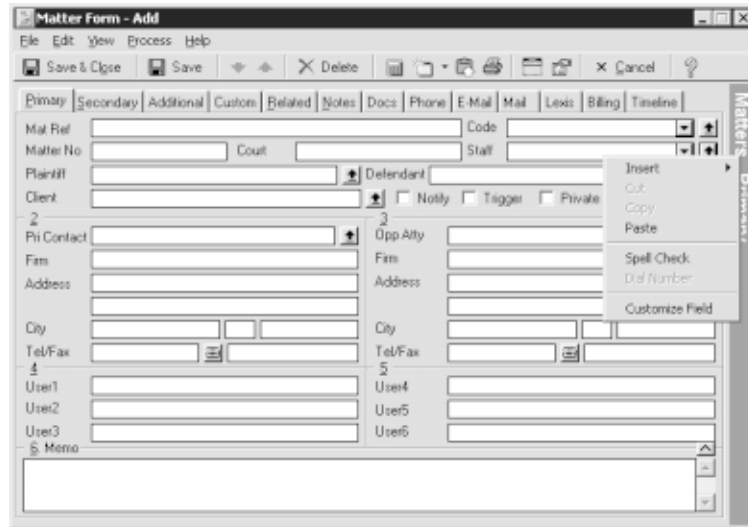
From the Contact or Matter lookup, select the record to which you want to relate the record, and then press **OK**.

In the following, the “Hearing on Motion to Suppress” has been related to the Contact Barry B. Able and the Matter Able v. State of Florida.

The screenshot shows the 'Event Form - Add' window with the following fields filled in:

- Date: 8/22/2001
- Wed Time: 2:00pm-4:00pm
- Code: HRNG:Hearing
- Description: Hearing on Motion to Suppress
- Staff: MBA:Marshall B Addison
- Regarding: Barry B. Able
- Able v State of Florida
- Reminders: 14,7,1
- Follow:
- Done:
- Notify:
- Hide:
- Trigger:
- Private:
- Status: 92-1236.1

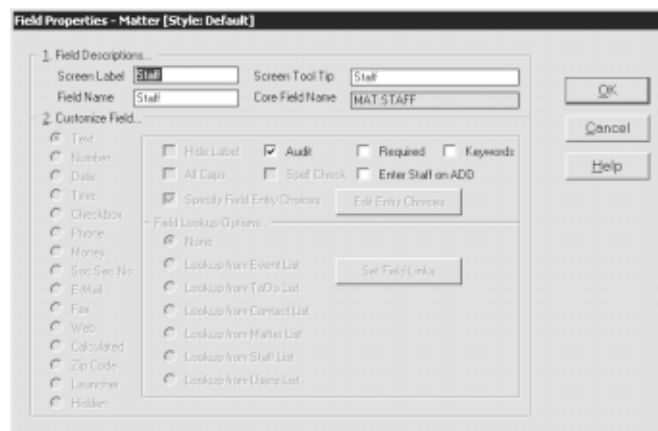
## Can I set TM4 to automatically enter my name in the staff field of a new record?



To set Time Matters to enter the initials and name of the current staff in the Staff Field:

- 1 Open a new record form.
- 2 Right click in the Staff field.
- 3 Select **Customize Field**.
- 4 In the Field Properties screen, check the **Enter Staff on ADD** box.

These steps must be taken for each of the record types.

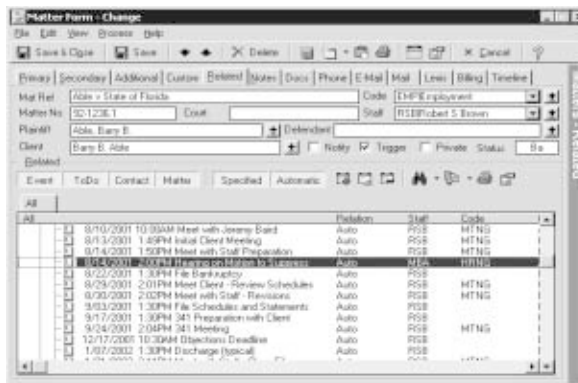


## What are Related Records and how do you show them?

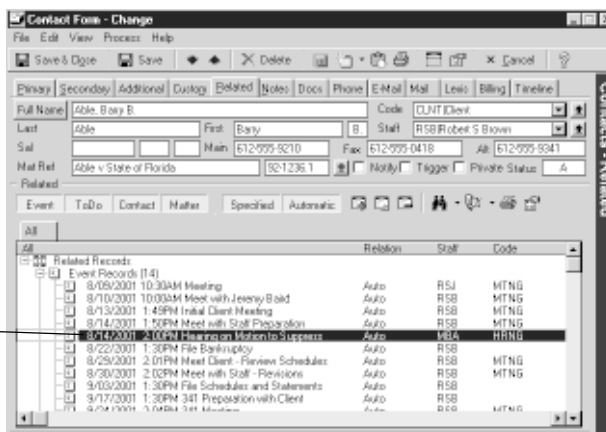
In a previous example, you saw how to fill in the Regarding Fields so a “Hearing on Motion to Suppress” was related to the Matter Able v. State of Florida.

This Event record can be found in the Event List and on the calendar. However, as a Related Record, it also can be accessed from either the Barry B. Able record in the Contact list, or from the Able v. State of Florida record in the Matter list.

- 1 Open the Matter form for Able v. State of Florida and select the **Related** tab. You can then view all of the Events, Todos and Contacts that are related to the Barry Able case.



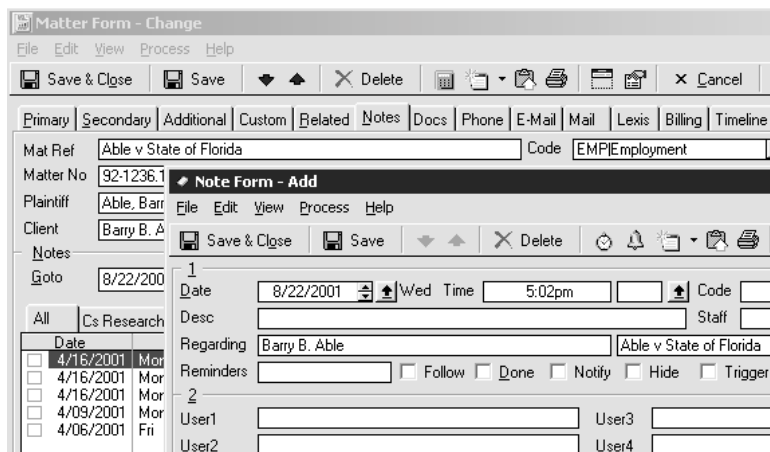
- 2 Likewise, select the **Related** tab on the Contact Form for Barry Able, and you can view all of the Events, Todos, and Matters that are related to Mr. Able.



Note the “Hearing on Motion to Suppress.”

Other records that have been “related” to a Contact or Matter can be accessed by selecting the appropriate “Notes”, “Docs”, “Phone”, etc., tabs on the Matter and Contact forms.

## I want to add a note to a Matter. How do I do that?



### To add a note to a Matter:

- 1** Locate the Matter on the Matter list.
- 2** Double click or press the change record button to open.
- 3** Click on the Notes Tab.
- 4** Select the Add Record button.
- 5** A new note form will open and will contain the appropriate Contact and/or Matter information.

### Another way to create a new Note for a particular Matter is to create it from the Matter List.

- 1** Highlight the Matter to which the Note is to be added.
- 2** Press **CTRL + SHIFT + N**.

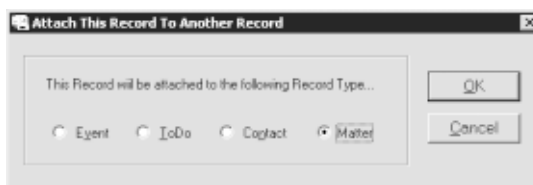
- 3** Right click on the record and select **Create Note**.
- 4** Press the add Note button on the Main Toolbar (if you have added it.)
- 5** From the Main Menu, select **New Record ► Note**.

A Note Form will open that will already contain information in the Regarding fields about the Matter that has been highlighted in the Matter List.

## I want to add a Note and “connect” it to several different Matters. How do I do that?

### To append one Note to several different Matters:

- 1** Bring up a new note form as specified in the previous question. A new Note Form will appear.
- 2** Select **Process ► Attach to Other Records**.



A dialog will open allowing you to indicate what type of record the Note should be attached.

- 3** Select the appropriate record and press **OK**.



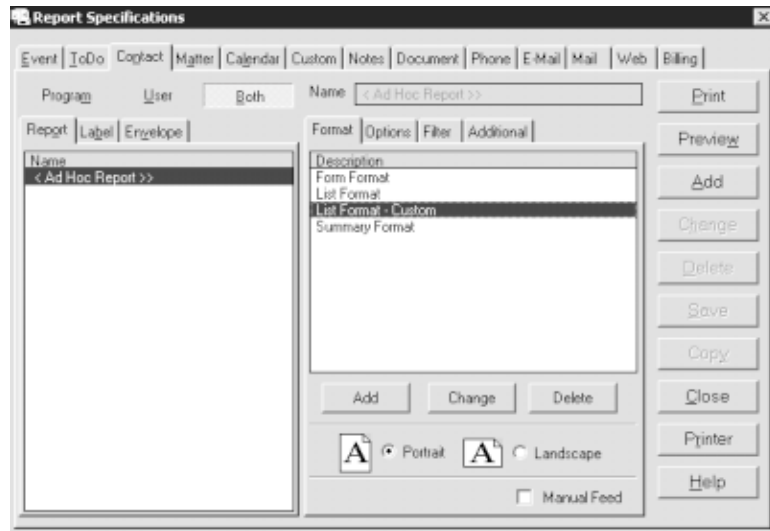
A list will open showing the type of record you selected.

- 4** Tag each of the records to which the **Note** is to be appended. Records are tagged by checking the box to the left of the selected record.

**I seem to set up the same reports over and over again. Is there a way to save them?**

As an example let's create and save a report that lists all of your Contacts.

Make sure that the columns in the **Contact** List are the columns you will want displayed in your report. (To learn more about how to do this, refer to the FAQ on the topic of adjusting and editing columns on a List.) The arrangement (and the width) of the columns in the List will serve as the basis of the columns for the report that is being created.



- 1** With your **Contact** List open, tag the records that you want included in your report.
- 2** The **Contact** tab will be selected and a list of **Saved Reports** will be located in the left column of the Report dialog.
- 3** Highlight **List Format - Custom** so that the new report will reflect exactly what is shown on the **Contact** List.
- 4** Because we tagged records before printing the report, there are no **Filter** options, and we won't need any of the **Options**, or **Additional** features.
- 5** Press the **Add** button in the upper right of the screen.
- 6** Give the Report a name: **Misc Contact List**.
- 7** Press the **Save** button to save the report.

Each time you want to print this report, you simply tag the records you want to print (your experts, your clients, etc.), press the **Print** button, and then highlight the saved report that will appear in the list of reports in the left column. You can then press **Preview** or **Print** to print the report to the screen or the printer.

This method of saving reports is particularly useful when you need to set a variety of **Filter**, **Options** and **Additional** settings. So that you don't have to set the report up each time, simply make sure the settings are correctly set, and then save the report for later use.

### **When adding an Event or ToDo, what does the Staff Button to the left of the Staff Field do?**

When you add an **Event** or a **ToDo**, you will note that the label for the **Staff** field is actually a button. When there is more than one Staff member entered into the **Staff** field, you can press the button to toggle between Staff and Group.

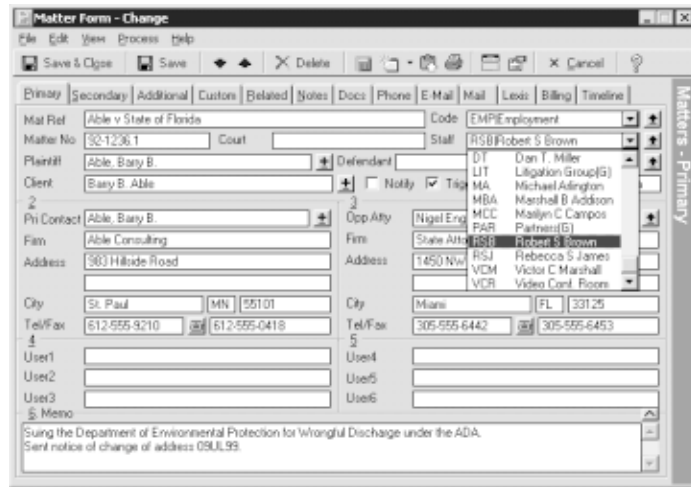
**Staff** - each person who is in the Staff field will have the **Event** or **ToDo** added to their calendar, but the records are not linked to one another. A change on one Staff's record will have no meaning to the others.

**Group** - each person who is in the Staff field will have the **Event** or **ToDo** added to their calendar, but the records are linked to one another. A change on one Staff's record will give you the opportunity to automatically make the same change in the others.

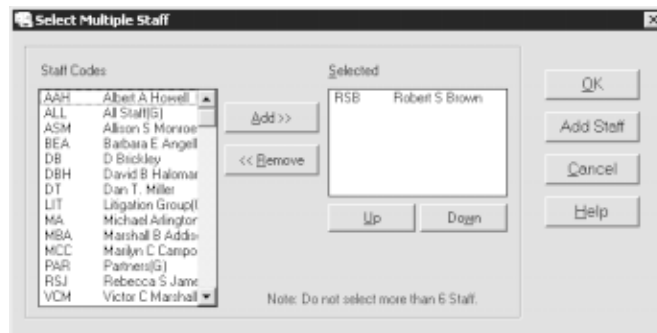
This is particularly useful when changes in date, time and location are made to an **Event** or **ToDo**. If Group has been selected, the you only have to make the change on one Staff members record for the change to be made to all Staff members' records.

You can set Time Matters so that by default when you enter more than one Staff member the button switches to **Group**. **File ► Program Setup ► User Level ► Forms ► Events and ToDos ► Automatically Group Multiple Staff.**

## What are the “up and down arrows” to the right of the Staff field for?



In the above screen shot, the down arrow or dropdown list has been selected, displaying a list of all Staff and Groups. By clicking on any single entry, the selection will appear in the Staff field.



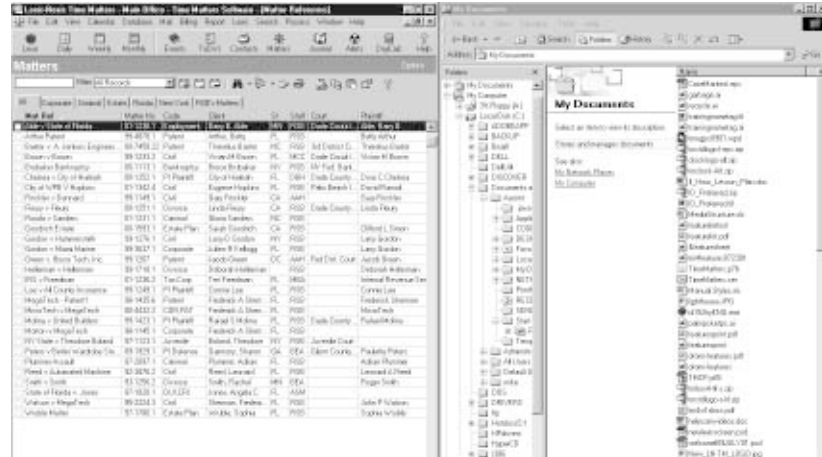
If multiple Staff or Groups are to be included in the staff field, the up arrow (the staff lookup) should be selected. When that is done, the **Select Multiple Staff** screen will display.

This screen will permit the selection of multiple staff members.

- 1** In the left column highlight the staff member to be added.
- 2** Press the **Add** button.
- 3** No more than six staff members may be added to the Staff field, and you can't mix Staff and Group selections.

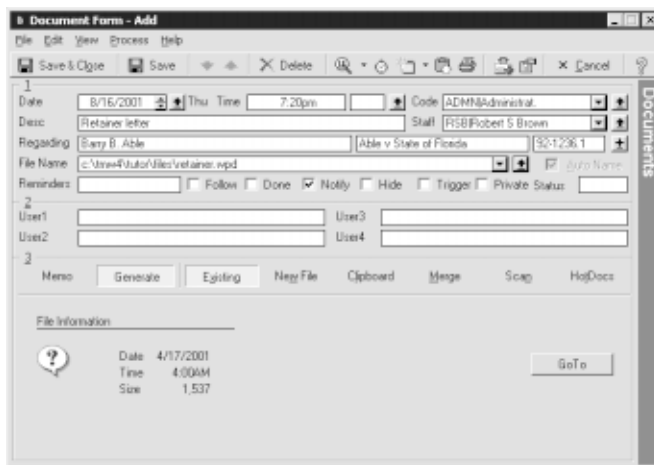
I'd like to link a word processing document with a case in Time Matters. How can I do that?

Open the Matter List and Windows Explorer.



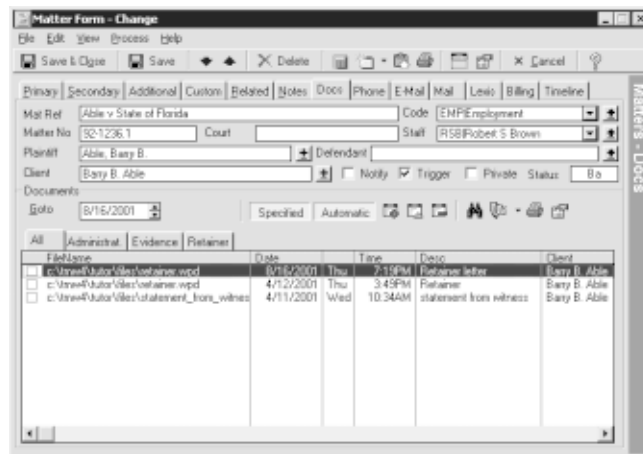
To connect the word processing file to Able V. State of Florida in Time Matters:

- 1 Click on the word processing file in Windows Explorer.
- 2 Hold the left mouse button down.
- 3 Drag the file over to the Time Matters screen.
- 4 Move the mouse pointer so that the point is on the Able Matter entry.
- 5 Release the left mouse button.



I'd like to link a word processing document with a case 19

- 6** A Time Matters new Document form will open, as shown above. Make sure the date is the same as the effective date of the word processing document, and enter information in the Code, Staff and Description fields.



- 7** When the Document Form is saved and closed, the document will then be found both in the Time Matters Document List, and at the Docs tab in the Able Matter form, as shown above.

You can also drag more than one document at a time. This is especially useful if you have a folder full of older documents that you want to relate to a Time Matters Matter. Locate the files you want to drag to Time Matters.

- 8** Press **Ctrl + A** to select them all.
- 9** Left click on the documents and drag them to the appropriate Matter.

When you drop the records on the Matter you will be given a dialog that lets you specify the parameters to be used as each of the files is related to the Matter.

Once you complete the dialog parameters, all the documents you selected will be related to the Matter on which you dropped the documents.

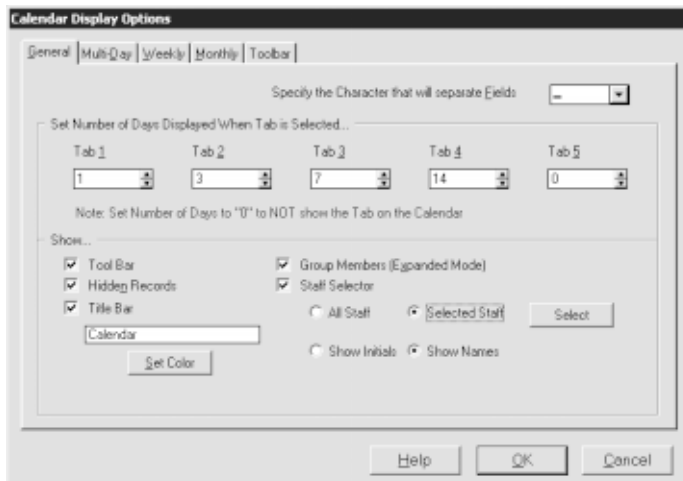
**On the Calendar, how can I edit the Staff Selector to show only those people I work with? Also, can I show either their full names or their initials?**

The staff selector bar runs just below the Calendar toolbar.

**To edit the Staff Selector Bar, do the following:**

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- 1** Right click and select **Display Properties**, or
- or**
- 1** Left click on The **Options** button at the right side of the calendar title bar.
- 2** The Calendar Display Options screen will open.



- 3** Select the **General** Tab.
- 4** Check the **Selected Staff** button.
- 5** Press the **Select** button.



- 6** Check the boxes next to the staff members that you want to include on the Staff Selector Bar.
- 7** Press **OK**.
- 8** If you want the Staff Selector Bar to show either the initials or the full name of the staff member, click the appropriate radio button next to the labels **Show Initials** or **Show Names** at the **General** Tab on the Calendar Display Options screen.

After completing these steps, the Calendar view will display only those chosen staff members on the Staff Selector Bar.

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## **A Staff Member Quit and We are Replacing Her ... How Can We Turn All the Records for the Old Staff Member into Records for the New staff Member?**

There is no easy, universal way to take care of this common issue. You will have to go to each different database (Contacts, Matters, etc.) to replace the initials of the staff member who is leaving.

- 1** Add the new Staff member as a User and a Staff:  
**File ► Security Setup ...** to add the new User.

We recommend that you use the initials of the user, not a full name (TLR instead of THOMAS.)

- 2** **Database ► Staff ...** to add the new staff listing.

Again, we recommend that you use the same initials you used when you set the new Staff member up as a User.

You can also add the Staff member from the Security Setup when you add a User. This is done in Area 2 of the Security Setup - User Form.

**3** Press the Lookup button to the right of the Default Staff/Group field in Area 2. This will enable you to add the Staff member at this point, and the assign the Staff id to the User

**4** **DO NOT DELETE** the old Staff Member, yet. The first thing you need to do is perform a full backup of your data to the server and/or to your local hard drive

**5** **File ► Backup/Restore ► Backup Time Mattes Data**

We suggest that you do two backups ... one to the server and one to your local hard drive. When you are making major and numerous changes to the database, this redundancy in your backup is important should you ever need to recover your previous data.

**6** You now need to start changing records in each database .. and to do this you will use Time Matters' "Search, Tag and Process" procedure.

Search, Tag and Process is what Time Matters calls its process to let you act on multiple records. Examples:

- 
- Merge multiple records to a document
  - Make changes to a number of records (as we are going to do here)
  - Delete multiple records
- 

**7** **Search.** We want to locate all the records in which the initials of the Staff member who is leaving appear.

Go to the **ToDo** list (or any other list where you want to make the change)

**Search ► Staff** ... enter the initials of the departing Staff member

**Note** that you can put a check mark in the field to **Tag All Records found in this Search**. When this checkbox is selected, all records that are found in the search will be tagged.

You will now have a list of all the **ToDo**s (or other record type if you are in a different database) that have the initials of the departing Staff member.

**8** **Tag.** If you did not tag the records using the checkbox in the **Search** dialog, you can do so now using the **Tag** keystrokes.

- 
- **CTRL-T** ... to tag all records
  - **CTRL-U** ... to untag all records
  - **ALT-T** ... to tag the currently highlighted record
  - **ALT-U** ... to untag the currently highlighted record
-

**9 Process.** Now that we have tagged all the records in the particular database for the departing staff member, we want to process them ... in this case "Changing" them.

**Process ► Change Records ► Create a New Template ► Change the Contents of a Field ► Next**

Replace Field = Staff

With Value = the initials of the new staff member

Replace This Text = the initials of the old staff member

Next, Next, Next, check off the backup option ... you will have done a backup previously that will suffice for the entire operation.

You can save the template if you want, but it is not likely that you will be using it again.

Finish

It will take several minutes for the program to go through and change each record.

Repeat this step in any of the 12 databases where the departing Staff member has records.

When you are completed, you can delete the User and Staff record of the departing Staff member.

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