

Time Matters Tips and Tricks

While the major features of Time Matters – Form Styles, E-Mail, Time & Billing conduits, etc. – tend to get most of the attention from users and reviewers alike, more subtle features are what make it the powerful and flexible program that it is. Mastering these tips will help increase your overall use and mastery of Time Matters.

Help

Time Matters has three ways to provide Help to the user



Manual - When you press the **Manual** button, a full PDF version of the Time Matters manual is loaded into Adobe Acrobat (which has to already be installed on the computer). If you have Acrobat version 4 or higher, the manual is context-sensitive and will automatically jump to the section of the manual that corresponds to where the user was in the program when they pressed **Help**.

Video - If you press the **Video** button, the HelpCam video for the section where the button is pushed is loaded.

Help - If you press the **Help** button the standard Windows help for Time Matters will be launched.

Recycle Bin

Time Matters has a built-in Recycle Bin. When records of all type are deleted, they are stored in the Recycle Bin until it is emptied. This is an internal feature that is separate and distinct from the Windows Recycle Bin.

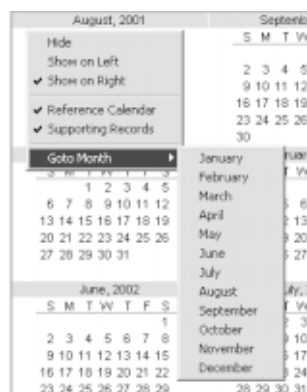
Calendar

Scroll Bar

Use standard Windows scroll bar techniques with the Calendar scroll bar.



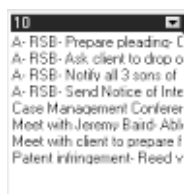
Reference Calendar



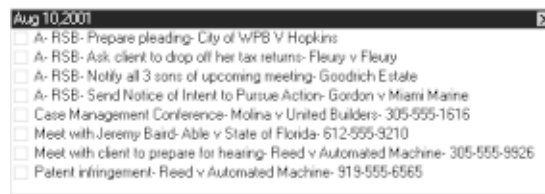
In addition to using the Reference Calendar to navigate around the calendars, you can right-click anywhere on the Reference Calendar and you will be given the option of going to any month in the year currently in focus.

Monthly Zoom Window

It is difficult to see any detail on the Monthly calendar. Use the Zoom feature to see all the detail you need:



Non-Zoomed



Zoomed

The Zoom Window can be sized by dragging the edges and will maintain that size until otherwise changed.

Calendar Fields

Notice in the Zoom Window screen shot above that the Events' description consists of the records' **Description, Matter Ref,** and **Tel** fields. You can customize what shows up as an Event's description.

- We recommend listing information like phone numbers so you don't have to bring up the entire Event record if you want to quickly make a call or take some action regarding the Event.
- Right click anywhere on the Calendar and select **Display ► Display Properties ► Monthly ► Select Fields** (the one in the upper right hand corner) and select the fields you want to show on the monthly calendar.

Tips on what fields to include:

- Don't include **Staff** as a field, but make sure that the **Show Atty/Staff Initials when more than one are displayed** checkbox is checked.
- The different calendars handle times differently. Use the following fields for optimal results:

Monthly - Time/Dur and End Time

Weekly - End Time, but not Time/Dur

Daily - only put Time/Dur or End Time if you have a hard time figuring out when your daily appointments end.

- For all records, add **Description**, **Matter Ref**, and **Tel** at a minimum.
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Staff Selector

Lets you quickly select staff members without having to use the drop down lists or staff lookup.



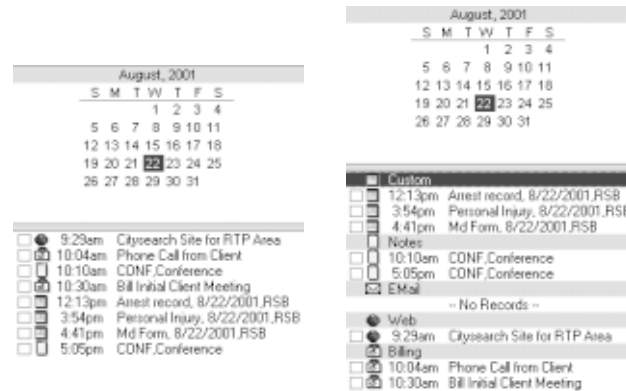
- Right click anywhere on the Calendar and select **Display Properties ►General**.
-



- Smaller firms can use **Show Names**, others will need to use **Show Initials**.
 - The **Selected Staff** choice lets you determine which staff members show up on the Staff Selector. This is good for firms that have workgroups where most people only work with a small select group of people in the firm.
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Supporting Records

You can show the supporting records for a particular day, along with the Reference Calendar:



- Right click on the Reference Calendar and select **Supporting Records**, or right click anywhere on the Calendar and select **Display Properties ► Supporting Records**.
- Right click in the Supporting Records area and select **Sort By Time** or **By Type**
- Control what Record Types are displayed in the Supporting Records area using the Record Type Selector at the top of the Reference Calendar.

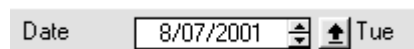


Changing the Date to Today

When you are adding a record that has a system date field (in other words, not a user defined date field), press the “T” key to change the date to Today.

Advancing the Date Field with the Keyboard

You will find that you will often need to move a date dependent record (ToDo, Event, etc.) forward a few days. You can use the mouse to click on the very small arrows, or use the up and down arrows on your keyboard to move forward or backward a few days.



Time Entry Shortcuts

When entering time, the following shortcuts will speed up entry:

- 9-5 will give you **9:00am- 5:00pm**
- 9.3 will give you **9:30am**, 10.45 will give you **10:45am**.
- Use the dot key instead of the colon as it does not require the use of the Shift key, and is also located on the number keypad.
- Don't use the lookup button for entering time unless you are absolutely and totally keyboard dysfunctional.

Time and Duration

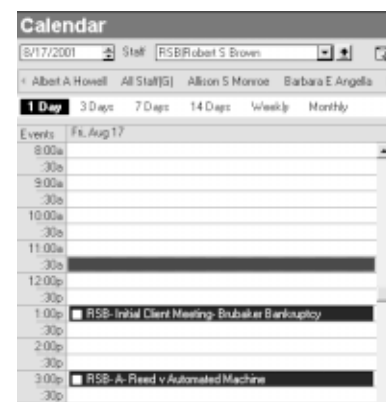
Time and Duration are actually three values ... start time, end time and duration. Give Time Matters any two and the third is calculated.

- Start Time and End Time gives you Duration.
- Start Time and Duration gives you the End Time.

Daily Calendar Description

You have the option of showing a description of an Event on the daily calendars.

- In the left screen shot below, note the white area below the 1:00pm and 3:00pm Events, showing the Event's description.



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- By default, the Event's description is the **Memo** field. But, you can adjust this to show any Event fields. Right click anywhere on the Calendar and select **Display Options ► Multi-Day ► Show Description ► Never, Always, If Selected**.
 - **BE CAREFUL** if you select **Always**. If the Event description area is large enough, it can cover a subsequent appointment.
 - We recommend that you select **If Selected**.
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Duration Bar

On the Multi-Day calendars, the program marks off the duration of the Event in one of four ways – Lines, Solid, Patterns or None.



Lines

Solid

Pattern

While we tend to like the Solid Duration Bar, our customers are all over the board on this so we can't recommend one look over the others.

Quick Alarm

Set a Quick Alarm when you might want to remind yourself to do something, but there is no need to enter a calendar item.

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- The best examples tend to be personal needs ... get the dry cleaning before it closes, get cash for the nanny before the bank closes, or deposit a check before 2:00pm.
 - **View ► Alarm Status ► Set Alarm ►** then enter the time and a message.
 - The Quick Alarm is only good for the current session of Time Matters. If you close Time Matters, the Quick Alarms for that day do not survive.
 - Make sure to close the Alarm screen when it pops up. The Time Matters Messenger will not deliver messages while the Alarm notification screen is activated.
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Year Calendar

The Daily, Weekly and Monthly calendars are obvious – the year at a glance calendar is not.

- The calendar is used for reference only ... you can not view or access Events and/or ToDos from the Year Calendar.
- **Calendar ▶ Date Calculator ▶ Calendar** or **Shift-F2 ▶ Calendar**

Lists, Forms and Data

Difference between Lists and Forms

While this may seem obvious, it is important to know that Time Matters data is generally viewed as a Lists or a Form.

This Contact List shows many records, but only a few fields for each record.

Contacts									
Filter: All Records									
All	Client Address	Opp. Counsel	Client	Expert					
Last	First	Firm	Code	Main	Staff	Mat Ref	Mat No		
		Alexander Hotel	Client	305-555-9617	Palmer(G)				
		City of Hialeah	Client	305-555-7711	Robert S Brown	Chelsea v City of Hialeah	90-1252.1		
		Tomas Title Insurance Company	Corporation	804-555-9012	Robert S Brown	Green v. Boyce Tech, Inc.	99-1267		
		MegaTech Computers, Inc	Corporation	305-555-4344	Robert S Brown				
		State of Florida	Defendant	850-555-8074	Robert S Brown				
Able	Barry	Able Consulting	Client	612-555-9210	Robert S Brown	Able v State of Florida	92-1236.1		
Abraham	Diane	Davis and Woodbridge	Co-Counsel	305-555-1702	Robert S Brown	Morton v MegaTech	99-1145.1		
Abraons	Saul		Defendant	516-555-0032	Robert S Brown				
Allen	Wayne		Client			Molina v United Builders	91-1423.1		
Alight	William		Expert	801-555-1234	Robert S Brown	Peters v Better Wardrobe Stores, Inc	85-1929.1		
Arthur	Betty		Client	305-555-9033	David H Halonaz	Arthur Patent	99-4076.1		
Augustino	Gino	Martin, Jones, Sawyer, et al	Opp. Counsel	305-555-7309	Albert A Howell	Fleed v Automated Machine	92-3976.2		
Bald	Jeremy	Baird Investigations	Investigator	561-555-3328	Palmer(G)	Smith v Smith	93-1296.2		
Baxter	Theodius	Fuquay/Vaina Contractors	Phil Client	919-555-7495	Albert A Howell	Baxter v. A. Jenkins Engineering LLC	99-7498.22		
Bennett	Catherine	Davis and Woodbridge	Co-Counsel	305-555-1702	Victor C Marshall	Gordon v HammerSmith	92-1276.1		

This Contact Form, on the other hand, shows only one record, but many fields.

Often you will use the Lists to locate the records that you want to view or work with and then open them in a Form to see more detail.

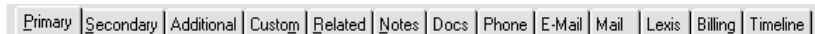
4 Main Record Types and 8 Supporting Record Types

Time Matters has 4 Main Record or Data types ... Events, ToDos, Contacts and Matters/Cases/Projects.

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- These are the records that will appear under the **Related** tab of a Contact or Matter record.
 - These are the record types for which you can create Form Styles.
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The 8 Supporting Record types, as the name implies, support the Main Record types.

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- The Supporting Record types are Custom Forms, Notes, Docs, Phone, E-Mail, Mail, Web, Lexis, and Billing.
 - You can access them in their own Main Lists, or you can access them as they are related to a particular Record using the Tabs across the top of the Form to view a sublist.
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Date Dependent and Non-Date Dependent Records

There are 10 Date Dependent and 2 Non-Date Dependent record types.

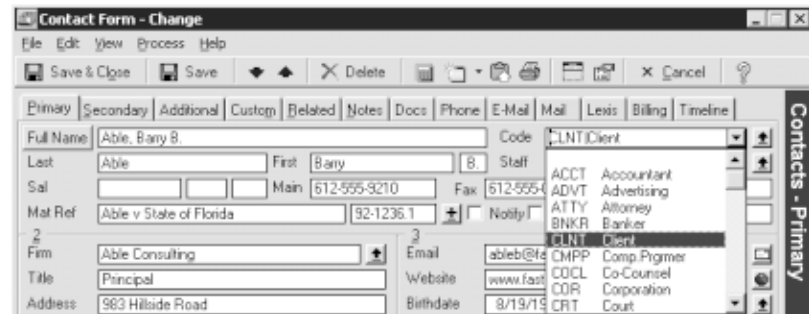
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- The record types that are Non-date Dependent are Contacts and Matters, which makes sense because you wouldn't normally "schedule" Contacts or Matters.
 - This difference is important when it comes to setting up defaults for these records. The Date Dependent records have features like *Follow* and *Done* that are unique to their Date Dependent status.
 - Date Dependent features will be common for all such record types.
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Lookup button v. Drop Down List

Throughout the program you will find two buttons side by side ... the drop down list button, and the **Lookup** button.

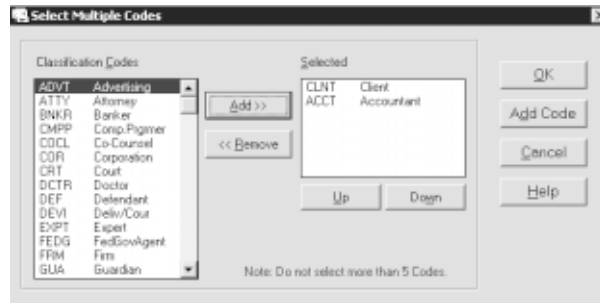


The drop down list button will give you a list of available options from which you can choose **one**. Note the available Classification Codes list appearing to the right in the following screen shot.



The Lookup button will pop up a dialog that will let you select multiple choices.

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- Use the **Add** and **Remove** buttons to move Codes (or Staff) between the two columns
 - Use the **Up** and **Down** buttons to place the selected items in the correct order.
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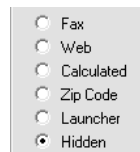
Use the F2 Key

Any time that you want to access a Lookup table by clicking on the Lookup button, press the F2 key instead. F2 is one of the most highly used shortcuts in Time Matters.

Get Rid of Unused User Fields

Unless you use all the fields in the Default Form Style, or any Form Style, you will have a number of fields that have the label UserXX. This can be distracting when entering data.

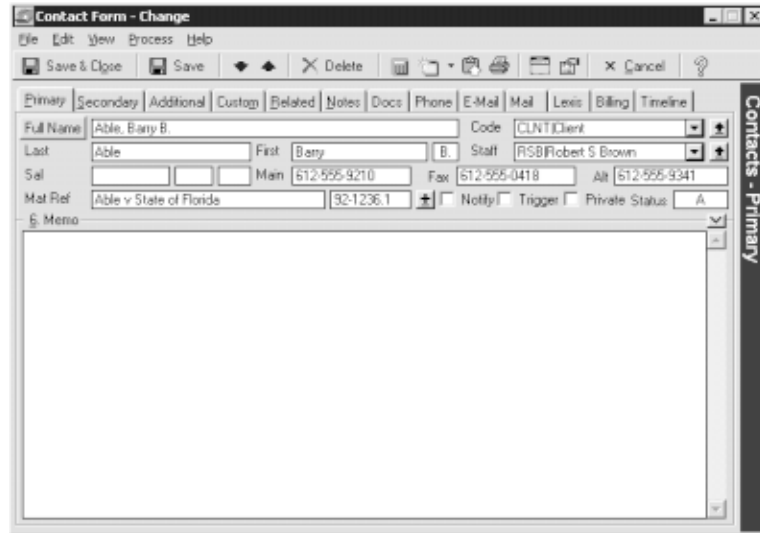
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- Right click on the field you want to hide and select **Customize Field** ► **Hidden**.
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- The screen shot on the right is cleaner without the User3 field.
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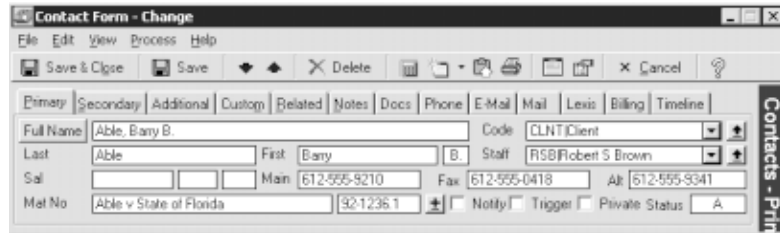
Large and Small Memo Field

If you use the **Memo** field to take extensive notes, you can choose to make it larger by pressing the button to the upper right of the **Memo** field.



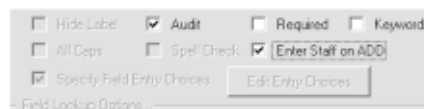
Short Form and Long Form

Similar to the **Large Memo** and **Small Memo** feature, you can also show the Form as a **Short Form** or a **Long Form**. The previous screen shot shows the **Long Form**, while the screen shot below is of the same record shown as a **Short Form**.



Enter Staff on Add

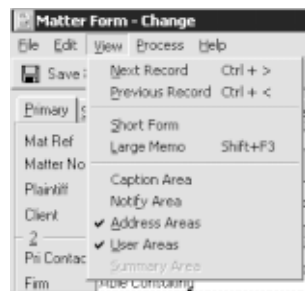
When you add a new record of any type, you can choose to have the **Staff** field auto-filled by Time Matters.



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- If you enter most of your own records, or if you enter records for only one person (a secretary for one lawyer), you should let Time Matters auto-fill the **Staff** name.
 - If most of the records you enter are for several different people, you gain little by having the **Staff** field automatically entered.
 - Right click on the **Staff** field for any and all Forms and select **Customize Field ►** check **Enter Staff on Add**.
 - If you want the **Staff** field to default to someone other than you (the case of a secretary entering items only for one lawyer), you also need to go to **File ► Security Setup ►** select your **UserID ► Change ► Area 2: Assign a Default Staff/Group to this UserID** and select the person whose records you want to create.
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Changing the Look of Forms

You can change the layout of various record Forms using the View menu. Different Forms have different areas available to them:

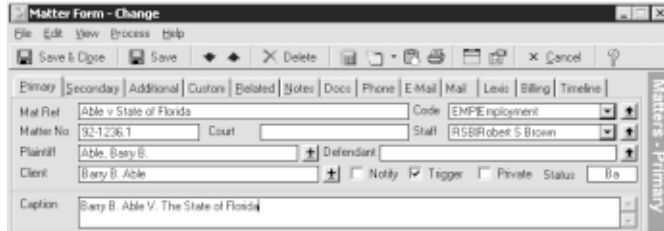


Matter Form View Options

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- By clicking on the various options, you can include or exclude certain areas of a Form.
 - If you aren't going to use certain areas – User areas are often not used – uncheck them so that the Form is less cluttered.
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Caption

In the Matter form, there is a **Caption** field that can be activated using the **View** menu as described above.



- This is a large, multi-line field that can hold case captions or styles of up to 256 characters.
- If you do not need the caption field – perhaps your practice is not a trial practice – this gives you another multi-line field for data storage.
- Once you have entered the caption information, turn the **Caption** field off using the **View** menu. The data is still there for use in documents, but it doesn't take up the valuable screen real estate that the **Caption** field uses.

Stretch Forms

If you have a larger monitor and you have your display set to a high resolution, you can stretch your Forms so that you have more room in which to work. In the example below, we are running at 1024 x 768 on a 15" monitor and we can stretch the Matter Form so that we can easily see the **Notification**, **Caption**, **Address** and **User** areas, along with a larger than normal **Memo** area.



Show Notify only if Checked

All records have a **Notification** feature that lets you set an **Alarm** or **Alert**, or send an **E-Mail** or **Message** when you Save the Form. If you choose to show the **Notification** area all the time you are wasting valuable screen real estate.

Use the option to show the notification area only when the **Notify** checkbox is checked.



From any Form, **Edit ► Options ► Default Settings for Notify Area on Forms ► Automatically if “Notify” is Checked.**

Record count

Ever want to know how many records you have in your Contact database? How many clients do you have?

- 1** Bring up the Main List for the database that you want to count, and select **View ► Record Count**
- 2** If you have filtered the database with a search or a Quick Tab, the Record Count will also tell you how many records are in the current subset of data.

The Contact List Doesn't have to Contain only Contacts

Don't think of a Rolodex when you look at the Contact database. Don't think only of a list of cases when you look at the Case/Matter database. Both of these databases, as well as the others, can be used to hold any type of data.

- We have used the Contact database for all sorts of data. For example, we used the Contact database to hold country information (country, nationality, country code) for an immigration firm.
- You should use the Matter and Contact database as a place to store Firm data.
- Set up administrative matters like **FirmName.Office Supplies**, **Firm Name.Personnel** or **Firm Name.Marketing**.
- Set up personal accounts like **Robert Brown.Subscriptions**, **Robert Brown.CLE** or **Robert Brown.Misc Articles**
- This gives you a place to store Notes, Phone notes, and E-Mail records that do not relate to a specific Client, Contact or Matter.

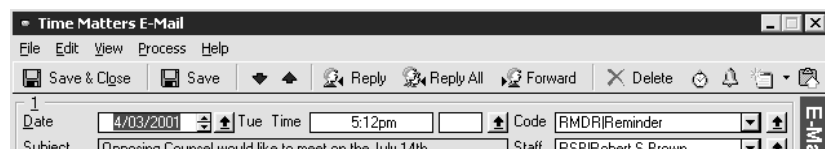
E-Mail Send Button

Most people who have been using an E-Mail client like Outlook and Eudora are used to having the **Send** button as the left most button on the Toolbar. The default setting on the Time Matters E-Mail client is to have the **Save & Close** button as the left most button. This results in some users **Saving and Closing** a newly composed E-Mail, but not actually sending it.

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- 1** **Ctrl-Shift-E** to add a new E-Mail record
 - 2** **Edit ► Edit Toolbar ► Compose Toolbar** and swap the **Save & Close** and **Send** buttons so that the **Send** button is now the leftmost button.
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E-Mail Form Toolbar

- As you use the Time Matters E-Mail client, you will start storing your e-mails on the E-Mail Main List. In this manner, you can relate e-mails to the Matters and/or Contacts to which they belong.
 - Once you have saved an E-Mail as a Time Matters record, and have removed it from your TM Inbox, you may later decide that you want to **Reply** or **Forward** an e-mail. By default, the E-Mail Form does not give you a way to do this.
 - Editing the Toolbar for the E-Mail Form lets you add the **Reply**, **Reply to All** and **Forward** buttons to the E-Mail Form toolbar.
 - **Edit ► Edit Toolbar ► Toolbar ► Add Reply, Reply to All, and Forward**. You will have to remove some other icons in order to have the room to add these new buttons.
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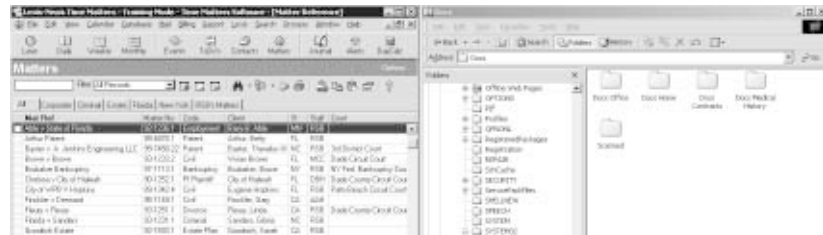


Documents - Using Windows Drag and Drop

You can create a Document record in Time Matters for a document that already exists on your system hard drive. One way to do this is to **Add** a new Document record and then “drill down” into the folder structure of your system looking for the file.

The easier way to accomplish this task is to drag and drop from Windows Explorer.

- 1 Make sure that the only two programs you have running are Time Matters and a Windows Explorer session.
- 2 Right click on the task bar at the bottom of your computer screen (anywhere other than where you have an program icon button showing), and then select **Tile Windows Vertically**. This will tile Windows Explorer and Time Matters as shown below.
- 3 You can now drag and drop files from the Explorer session to the appropriate Matter or Case. Make sure that the point of the cursor is over the Matter to which you want to add the new file before you drop the file. The Matter that is highlighted is not important ... it is where the point of the cursor is located that determines to which record the new document will be added.



- 4 When you drop the file(s), a new Document Form will pop up with the Matter information and the file's path and name already entered. You simply need to fill in the rest of the information that you want in the Document Form. If you drag and drop multiple files, a special dialog lets you handle them all quickly and easily.

If you are really good with a mouse, and know how to **Alt-Tab** between programs, you don't have to Tile the two programs.

- 5 Go to Time Matters and make sure that you have selected the Matter or Contact to which you want to add the document (or that it is at least showing on the list.)
- 6 Go to the Explorer session and find the document(s) you want to add to Time Matters.
- 7 Start to drag the document(s). As soon as the cursor changes to the Copy Cursor, **Alt-Tab** to Time Matters, and then drop the file onto the Matter or Contact to which you want to add the document.

This technique of dragging and dropping works with the PaperPort Desktop.

Messenger

Showing Read or Unread Messages - Potential Confusion

When messages are first received, they are “unread.” When they are opened and the user then presses **Save & Close**, they are “read.” Unread messages are shown with bold type, while read messages are shown in normal type. The TM Messenger has three buttons that let you see both read and unread messages, only read messages, or only unread messages.



As shown to the right, if the **Show Unread Messages Only** button is pressed (oftentimes done inadvertently), and there are only “read” messages, the user can mistakenly think that their messages have been deleted.

Because we discourage saving lots of messages (they are not designed to be saved or related to a Case or Contact), we suggest that users typically use the button that shows Read and Unread messages.

TM Messenger Disappears

The TM Messenger is actually a program separate and distinct from Time Matters. While the two work closely together, they are different programs and from time to time they can seem to stop cooperating. When this happens, pressing the TM Messenger icon in Time Matters doesn't bring the Messenger into focus. If this happens, go to the task bar, locate the program icon for the TM Messenger and click on it to bring the program into focus. You can then press the X button on the upper right hand corner to close it so it will work properly.

Always on Top

Make sure that you have the **Always on Top** stick-pin pressed in. This will make sure that the Messenger Window stays visible after it pops up when a message is received.



This is especially important if you want the Messenger to pop up when you first start Time Matters, and when you have the **Alerts and Reminders** dialog set to come up at startup. If you do not have the **Always on Top** feature selected, the Messenger window will pop up and then drop behind Time Matters when the **Alerts and Reminders** screen comes up. If you don't notice that happen, you will not know that you have any new messages waiting.

Adding, Editing, Changing and Saving Records

Tab & Shift Tab

The **Tab** key is used to move from field to field in Time Matters. **Shift-Tab** is a reverse **Tab** and will move you back to the previous field.

Current State Shown on Title Bar

Forms can be in one of four states – **Add**, **Change**, **Delete**, or **View**. You can always see what state the current record is in by looking at the Form Title Bar. This is important as certain actions only work when you are in a particular state, like **Add** or **Change**.

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- Adding a Group event to the calendar will create records for the individual group members only in **Add** mode. We have had customers wonder why everyone in the Group did not have a Group event added to their calendar. We found it was because the Group Event was added in **Change** Mode, meaning that the Group calendar showed the Event, but the members of the Group did not.
 - Certain Triggers or AutoGen fields are activated only in the **Add** mode.
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Customize the Toolbar

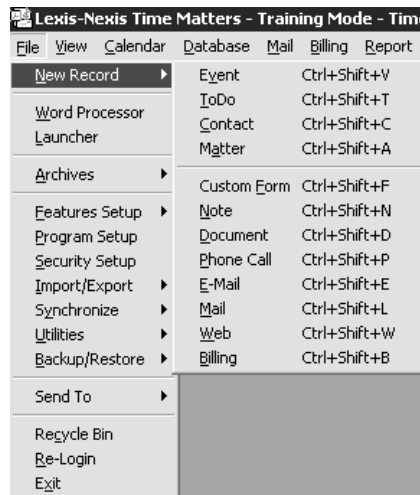
Have it your way ... customize your toolbar to reflect how you use Time Matters.

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- 1** **File ► Program Setup ► User Level ► Toolbar**
 - 2** Interestingly, small icons take more screen space than large icons. We recommend that you turn off Show Icons as Gray giving TM the old TM2 toolbar ... it is easier to see and use.
 - 3** Make sure to use the Add [record type] buttons. These make it easy to add commonly used record types like Events, ToDos, Notes, Phone and E-Mail with a click of the mouse.
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Ctrl-Shift Keys

For users who are keyboard proficient, you can use keyboard shortcuts to add a new records fro anywhere in the program. The keyboard shortcuts are as follows:

Case	Ctrl-Shift A
Contact	Ctrl-Shift C
Event	Ctrl-Shift V
ToDo	Ctrl-Shift T
Notes	Ctrl-Shift N
Custom Forms	Ctrl-Shift F
Phone	Ctrl-Shift P
Doc	Ctrl-Shift D
E-Mail	Ctrl-Shift E
Mail	Ctrl-Shift L
Billing	Ctrl-Shift B
Web	Ctrl-Shift W
TM Messenger	Ctrl-Shift M



On any Form or from the TM Desktop you can go to **File ► New Record** and you will see a list of the keyboard shortcuts for adding a new record.

Inheritance

Some people add new Event and ToDo records from the Calendar. Or, you might go to the Contact list to add a new Contact, and the Matter list to add a new Matter.

With Inheritance, adding all records from the Matter or Contact list is the better way to go as the **Regarding** fields are automatically completed based on the information from the currently selected Matter or Contact.

Multiple Data Entry and Edit Screens

In previous versions of Time Matters, if you were filling in an Event Form and wanted to quickly add a Contact, you had to get out of the Event Form first. You can now have multiple Forms open at the same time. If you are writing a Note and you receive a phone call, you can press **Ctrl-Shift P** to fill in a Phone call record, and then go back to your Note.

Archive Matters Using Timeline

- 1** Open the Matter you want to archive and click on the **Timeline** tab.
- 2** Using the **Record Type Selector** across the top, make sure that you have all the record types selected.
- 3** Press **Ctrl-T** to tag all the records, and then goto the **Process** icon for the Timeline list (don't use the **Process** menu item ... that is for the Matter record itself, not the related records) and then select **Archive**. This will archive all the related and supporting records, except Contacts.
- 4** Goto the **Process** menu item on the Matter record and press **Archive**. This will archive the Matter record itself.

Note that this method does not archive Contacts. This is done on purpose as most people like to keep their contacts after a Matter has concluded because Contacts will often be used in other Matters, or they want to keep the Contact records for marketing purposes.

Save & New, Save & Copy

By default, all Forms have a **Save & Close**, and a **Save** button. The **Save** button saves the records, but leaves it open for additional editing. The **Save & Close** button saves the record and then closes it.

The **Save & New** command (**File ► Save & New ...** or add it to the Form Toolbar) saves the current form and then gives you a new, blank Form in **Add** mode. This is helpful if you are entering a number of the same type of record that having nothing in common. An example would be to load a series of ToDos, use **Save & New** so you don't have to continually close and open new Forms.

The **Save & Close** command (**File ► Save & Close ...** or add it to the Form Toolbar) saves the current form and then gives you a new Form in **Add** mode that keeps the data from the previous Form. This is very helpful if you are entering several records of the same type that have much in

common. An example would be adding ToDos that relate to a particular Matter and the only thing that changes from record to record is the Description. This will keep you from having to enter all the other information over and over.

Keyboard Shortcuts

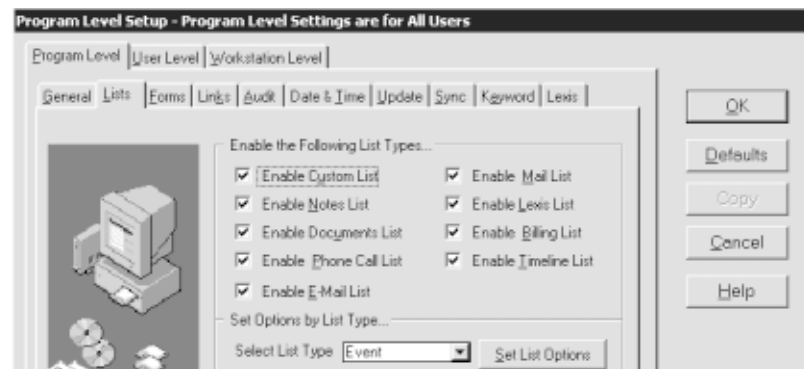
In the Time Matters manual you will find a listing of all the Keyboard Shortcuts that you can copy and distribute to your users.

Program Setup

Limit the program to only those modules you use.

Time Matters lets you activate only the modules that you are going to use. If, for example, you are not going to use the Billing module or the Mail module, avoid confusion by “eliminating” them from the program.

-
- 1 File ► Program Setup ► Program Level ► Lists ►** check or uncheck the **List Types** you want or don't want.
-



This can also be controlled at the User Level. For example, you might activate Billing at the Program Level and then disable it for particular users who don't need that module.

-
- 1 File ► Program Setup ► Program Level ► Lists ►** check or uncheck the List Types you want or don't want.
-

Color Code the Staff for Group Calendaring

Using the multi-day calendars for group scheduling is a powerful Time Matters feature. You can make it even more useful by color coding the Staff entries, and then setting the multi-day calendars to differentiate the Events by Staff Color.

- 1 Database ► Staff ► Change ►** press the **Color** button to set the Staff color.
 - 2 File ► Program Setup ► User Level ► Calendars ► Calendar Options ► Multi-Day ►** set **Header Color to Staff**.
-

This is a User Level setting, so you will have to do this to each User, or you can **Copy** the settings from one user to the others.

Classification Codes and Reminders

By default, the Classification Codes that come with Time Matters have **Reminder** fields that are filled in with entries like *7,3,1* and *3,2,1*. This will result in new users having a tremendous number of **Reminders**, overwhelming their **Alerts** and **Reminders** screen. Once this happens, they will stop using it. Make sure that you adjust the **Reminders** to the minimum you need.

Staff also means Resources

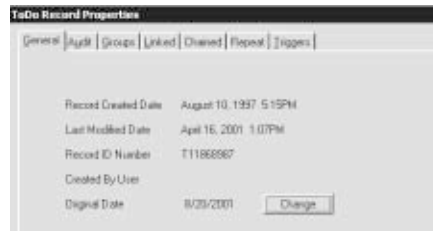
When a new user adds Staff members, they will enter all the “people” in the office. However, the Staff list should also include firm resources that need to be scheduled. For example:

- Conference rooms should be on the Staff list. Then each conference room has its own calendar that can be viewed by the users. When a calendar Event is scheduled, the appropriate conference room should be included in the Staff field.
 - Check-out laptops would be another resource that could be scheduled.
 - If there is a conflict with the “resource” the user adding the Event will be so warned and can schedule a different conference room, or another laptop.
-

Record Properties & Auditing

Record Properties

From time to time, you may want to see basic information about a record. Pressing the **Property** button on any record will let you see all sorts of information about the record, including when it was created, by whom, when it was last modified, audit information (see below), and other important information about the record.



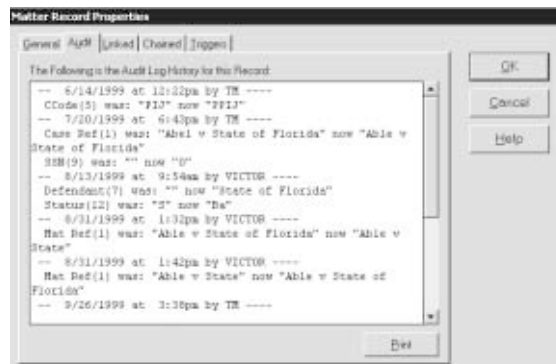
Field Level Auditing

There are many reasons why you would want to be able to track the changes in a field.

- To go back and “audit” an Event or ToDo to see when dates are changed on an Event or a ToDo.
- To see who changed some information that should not have been changed.

While most of the more important and required system fields are audited automatically, the user defined fields can be customized so that they are also audited when a change to them is made.

- 1** Right click on the field you want to audit and select **Customize Field** and check the **Audit** checkbox.
- 2** To view the record audit log, press the **Properties** button and then the **Audit** tab. It can be printed by hitting the **Print** button in the bottom right hand corner.



Program Level Auditing

You can track all additions, deletions and changes made to all record types. This can be a great tool for administrators to see how the staff is using the program.

At least one Time Matters customer has used it to recover from a major hard drive crash. They did not have adequate backups, but were able to reconstruct much of their transactions from the Audit Log.

To turn the Master Audit Log on:

- 1** File ► Program Setup ► Program Level ► Audit
 - 2** Make sure that **Auditing** is activated.
 - 3** You can then activate the various levels of **Auditing**.
-

To print the Master Audit Log:

- 1** Report ► File Reports ► Master Audit Log
 - 2** Select a date range and you can specify that you only want to review activity of a single User or all Users.
-

To view the Master Audit Log:

- 1** Report ► File Reports ► Master Audit Log ► Preview
-



Searching

Use QuikPik, not the GoTo Record Field

If you have a List in focus, you can simply start typing the first few characters of the record you are looking for, and in a matter of seconds you will have located that record.

- There is also, by default, a **GoTo Record** field in the upper left hand corner of the List which lets you enter the word you are looking for and then press Enter to locate it.
 - The **Quik Pik** method is quicker as you don't have to go to a particular field, and you can often get to the record you are looking at by only entering the first few characters.
-

If you choose not to use the **GoTo Record** field, it can be removed from the screen to avoid confusion and save screen space.

From the List that you are working with, press the **Options** button in the upper right hand corner ► **List Toolbar** ► uncheck **Show GoTo field**. If you do not use filters, which is likely, you can also remove that field from the screen.

Use Keywords Whenever Possible

Whenever you search for a particular name or word in the Lists, use the **Ctrl-K, Keyword Search**. It is very much faster.

If you were wanting to locate “Microsoft” in a book, you could find it two ways. You could go through each page of the book, looking for “Microsoft.” This is the equivalent to the **Ctrl-F, Text Search**. As you can imagine, it would take a while. Or, you could go to the books index and there would be a listing of the exact page numbers on which the word “Microsoft” appears. That would be a very quick search and would be the equivalent to the **Ctrl-K, or Keyword Search** in Time Matters.

The results might be a little different. A **Text Search** for “Smith” would return occurrences of “Hammersmith” and “Smithkline” in addition to all occurrences of “Smith.” Only occurrences of “Smith” would be returned in the **Keyword Search**.

To turn Keyword Searching on goto **File ► Program Setup ► Program Level ► Keyword ► Fields with Keyword Property Checkbox Checked**. You will then need to rebuild and reindex your databases under the **Database Maintenance** section of the program to finish the Keyword setup

process. You will also need to go to each of the 12 data forms and for each commonly used field you want included in the keyword index you will right click on the field, then select **Customize Field ► Check Keywords**.

Be careful of selecting all fields on main and supporting record forms as this selection can dramatically slow down your system.

Conflict Search using Keywords

Conflict searches can take a lot of time, especially as your database size grows.

One option is to only search for Keywords. In that you only want “Smith” and not “Hammersmith” when you are searching for conflicts. Using the **Keyword Only** option, you will take 5 minute conflict searches down to a few seconds. Also, because the keyword index may not contain all fields, it is not a total search.

When you enter the search name or text in a Conflict or Global search, press the **Advanced** button to specify you want to use the keyword search.



Set Default Searches to Combined Search

The **Search** button, is really a two part button – the part with the Binocular icon on it, and the part with the “down arrow” on it. Pressing the down arrow gives you a list of the different type of searches that are available for the particular record type you currently have in focus.

Pressing the **Binocular** portion of the button will launch one of the types of searches that you saw on the list when you pressed the down arrow. This is the default search method for this particular record type.

We recommend that you set the default to the **Combined Search** as you can then do any type of search that is otherwise available from the **Search** menu.

- 1** To set the default goto **File ► Program Setup ► User Level ► Lists ► Set List Options (for each List type) ► Search Button Uses Following Search by Default ►** select **Combined Search**.
-

Keyboard Commands for Tagging Records

Tagging records is important for processing groups of records at the List level. When a record is tagged, an “X” will appear in the box to the left of the record in the List.

- **Ctrl-T** and **Ctrl-U** tag and untag all records in the current List, respectively.
 - **Shift-T** and **Shift-U** tag and untag the currently highlighted record record, and then moves down to the next record.
-

Column Sort

By default, date dependent records are sorted by **Date**. Contacts can be sorted by **Last Name**, **Full Name** or **Firm Name**. Matters can be sorted by **Matter Ref** or **Matter No**. These are hard coded indexes, and Lists sorted by these columns can be searched very quickly using the **Quik Pik** method of searching.

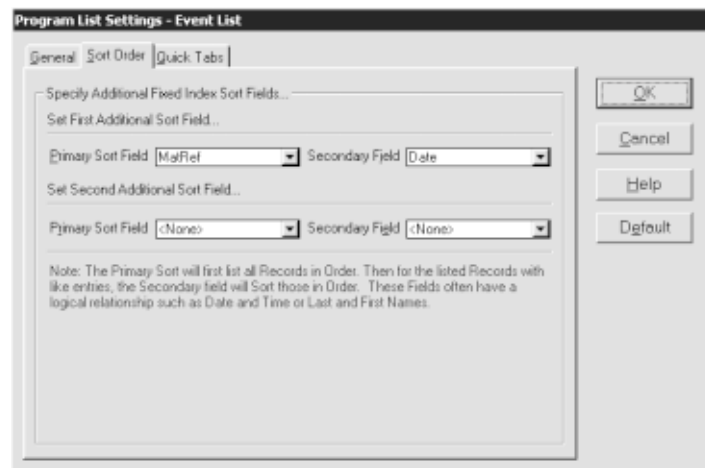
If you want to Sort a List by a different column, simply press the **Column Header** or **Label** and the list will sort by that field. This could take a while, depending on the speed of your system and the number of records that you have in the list.

The **Column Label** for the column you pressed will now be in Bold text. This is the column that is now used for a **Quik Pik** search. For example, if you are in the Event List, you can click on the **Matter Ref** column label. You can then type in “Gord” and you will be taken to the first Event for the “Gordon v. Hammersmith” case.

Additional Fixed Indexes

The Column Sort is a great way to view records in a list in an order other than that which is available by default. However, the sorts can be slow. If you have certain Column Sorts that your firm uses a lot, you can pre-set indexes in addition to those that are hard coded in Time Matters.

-
- 1** **File ► Program Setup ► Program Level ► Lists ► Set Options by List Type ► Set List Options** (for each List type) ► **Sort Order**.
 - 2** For each List Type you can set two additional indexes.
 - 3** For each index, you can set a primary Sort field and a secondary Sort field. For example, if you wanted to be able to quickly sort the Events List by **Matter Ref**, you would set the **Matter Ref** field as the primary Sort field and **Date** as the secondary sort field. In this manner, the list would first be sorted by **Matter Ref**, and then where you have the same **Matter Ref**, the records would be sorted by date in chronological order.
-



- 4** By including one of the default indexes (i.e., Date field for Events) as the Secondary sort field makes the sort perform faster.
 - 5** You will need to do a database rebuild and reindex to build the new fixed indexes.
-

Reports

Report Parameters can be Saved

When printing reports, there are numerous parameters that you can set. For example, you can specify what type of report that you want, what information you want to print, whether you want the memo field to print, whether you want page breaks after each record is printed, date ranges, etc. If you had to do that every time you print a report, it would be too cumbersome. To get around this problem, Time Matters lets you Save reports.

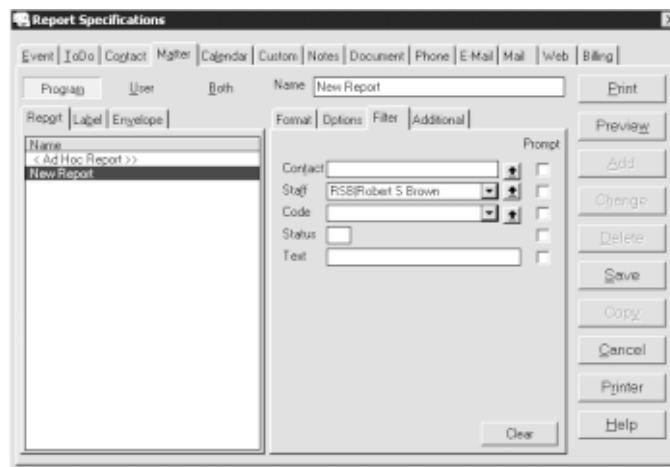
Set up a report the way that you want it to look.

- 1** Press the **Add** button which will activate the **Name** field with a default name of **New Report**.
 - 2** Change the **Report Name** to describe the report that you want to save.
 - 3** Press **Save**.
 - 4** In the future, when you want to print that same report you press the **Print** icon, highlight the saved report and then press **Print**.
-

Feeding data to Reports at Runtime

When you Save a report, you don't always know all the report parameters that you will need when you later run the report. For example, you might have a report that prints a List of Matters, but you might want to print only a certain type of Matter, and only that type of Matter that belongs to a certain Staff member.

- 1** After you pressed **Add**, go back into the **Filter** tab (or any of the other tabs where you can customize a report) and you will now note that there is a series of **Prompt** checkboxes to the right of each filter field.



- 2** Check the checkbox to the right of **Staff** and **Code**.
 - 3** Now name the report and **Save** it.
 - 4** The next time you run it, Time Matters will prompt you for the information needed to complete the report.
-

Quick Tabs

Dates are Relative to Today

When you set up Quick Tabs (or a saved Report), there will be times that you want to limit the records on the list to a specific date or date range. For example, you might want to set a Quick Tab to show the next two weeks' ToDos.

If you set the two weeks range with today's date and a date two weeks from now, do you have to go in and adjust the date every day? No, thanks to the **Dates are Relative to Today** feature.

The screenshot shows a 'Combined Search' dialog box with two main sections: '1 Match Data...' and '2 Match Text...'. In the 'Match Data...' section, the 'Date From' field is set to 10/14/1900 (Sun) and the 'To' field is set to 10/28/2050 (Fri). Below these are fields for 'Matter Ref', 'Matter No.', 'Client', 'Staff' (set to RSB|Robert S Brown), and 'Code' (set to DEPO|Deposition). The 'Status' field is empty, and the 'Dates are Relative to Today' checkbox is checked. At the bottom of this section are radio buttons for 'Done', 'Not Done', and 'Both'. The 'Match Text...' section has a 'Name/Text' field, a 'Specify Search Field' dropdown set to '(none)', and a 'Form Style for Search Field Labels' dropdown set to 'Default'. On the right side of the dialog are buttons for 'OK', 'Cancel', 'Clear', and 'Help'.

When you set the date or date range, put a check in the check the **Dates are Relative to Today** checkbox. This means that the date or dates will move forward each day always remaining current. The example above shows a date range of two weeks that will move forward each day, showing a current two week period of ToDos.

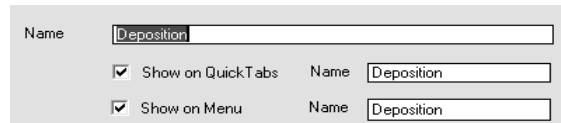
Quick tabs show on the Menu, too

Typically, Quick Tabs are shown as tabs across the top of List for which the were created.

- One limitation to this is that you can only put so many tabs across the top of the list. Depending on the size and resolution of the screen, you might get 10 - 30 tabs. If you need more than that, the tabs will scroll across.
- If a user has a need for that many “memorized searches” then you should consider putting some of the less used Quick Tabs onto the Database or Calendar menu instead of setting them up to show as tabs.

Time Matters Training: **Tips and Tricks**

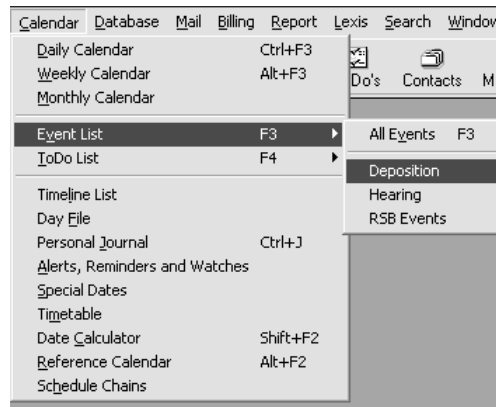
- When you create a Quick Tab, you are given the option to **Show on Quick Tabs** or **Show on Menu**, or both.



Name:

Show on Quick Tabs Name:

Show on Menu Name:



Deposition Quick Tab displaying as an option on the Event List Menu