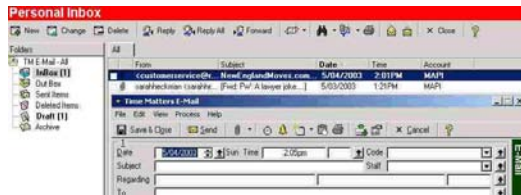


## E-Mail

Time Matters lets you manage the e-mail of your general e-mail program (such as Outlook or GroupWise) or even act as your primary e-mail client. Either way, the main advantage of this is that it enables you to associate all e-mail that anyone in the firm has received concerning a particular matter to that matter, and thus easily to consult all e-mail concerning that matter.

Click on “In-Box” to see your own in-box; Click on the icon with the green “+” to save the e-mail as a Time Matters record:

Select the “regarding” information to save the e-mail to a given matter.



**Important:** There are two check boxes that govern how e-mail is displayed: if “Show on In Box” is checked, you see it in your personal inbox. If “Show on Email List” is checked, everyone sees the email. Be sure “Show on Email List” is checked. When you have finished with it, you may want to uncheck “Show on In Box” to delete it from your In Box.

**Important.** If you use Time Matters to manage your e-mail, you should keep a relatively “clean” inbox. Otherwise you may have significant performance issues when you initially open e-mail.

## Keystroke Shortcuts

Accomplished typists may prefer to use the numerous keystroke shortcuts available in Time Matters (there is a reason why they are termed “shortcuts”). Some of the most common are:

New Contact .....	Ctrl Alt C
New Matter .....	Ctrl Alt A
New Note .....	Ctrl Alt N
New Document .....	Ctrl Alt D
New Phone Message .....	Ctrl Alt P
New Billing Item .....	Ctrl Alt B
Quick Bill List .....	Alt 6
TimeSheet .....	Alt 5
Billing Item List (all items) .....	F12
Appointment (Event) .....	Ctrl Alt V
ToDo .....	Ctrl Alt T
E-Mail .....	Ctrl Alt E
See Messenger Screen .....	Ctrl M

# Time Matters 5 Cheat Sheet

## Basic Operation Screen

Time Matters is highly configurable and your screens may not look exactly like the ones shown in this document. The basic functionality, however, remains the same.

Time Matters has four basic modules or Record Types: Calendar (“Events”), Matters, Contacts and ToDos. In addition, there are eight “Supporting Record” types, including Notes, Documents, Phone Messages, E-Mail, and Time Entries (“Billing”). Your main button bar is likely to look similar to this:



Click on the desired record type (e.g. “Contacts”) to open that portion of Time Matters.

The button bars and other options of every record type in Time Matters are similar. Once you are familiar with them, navigating is easy.

## Main Functions

All main windows have a spreadsheet-type look (the columns can be customized), and a button bar at the top of that window.



**Add, Change or Delete Records.** Use the button with the green “+” to add a record, the one with the green delta (“Δ”) to change a record, and the one with the red “x” to delete a record.



**Search.** To Search for information, click on the binoculars. You can search for different types of information: to make a choice, click the Down Arrow to the right of the binoculars.



**Copy to Clipboard.** To copy various information from the record the cursor is on to the clipboard, so that it can be pasted into your word processor, click the Clipboard icon. A list of choices will appear. Click the format you want to copy to the Clipboard.



To process other types of information click the down arrow on this icon.

## QuickTabs

One of the most powerful features of Time Matters is “Quick Tabs.” You will see a number of tabs across the top of the Contact or other Window:



To see just contacts that are assigned to the “Attorney” code, click “Atty,” to see just contacts assigned to the “Client” code, click “Clients,” and so on. You can have as many QuickTabs as you want.

**To Create a Quick Tab**, right-click on any existing Tab, then select “Edit QuickTabs.” Name the QuickTab as desired (use an abbreviation to save space). Click the “Filter” button and select “Combined Filter.” To set a QuickTab for a particular code (such as Adjuster), click the down arrow next to the “Code” box and select the desired code. You can select up to 5 codes by clicking the up arrow and selecting multiple codes. Click  until you are back in Time Matters. You will see the quick tab. Quick Tabs are also available from the Database | Contact List (or other) menu selection. You can also create QuickTabs on sublists.

## Power Views

Times Matters 5 includes “Power Views” which allow you to view selected information about a record without having to open it. There are several Power Views (*e.g.*, Summary, Notes, Phone Messages) and additional ones can be created. You can associate specific Power Views with Quick Tabs so that *e.g.*, Real Estate information displays when the Real Estate Quick Tab is selected. Ask for help if you need to view specific information on a Power View.

## Finding Information

In addition to using the QuickTabs or Power Views, there are several other ways to find information. Information can be sorted by any column. Thus if it is sorted by last name and you wish to sort by Company Name, simply click on the “Company” column header.

You can find any Contact (or Matter, etc.) simply by starting to type the last name (or company name if the list is currently sorted by Company Name). A “Quick Pik” window appears and the cursor goes to the name beginning with the letters you type. Thus if you type “hec”, it goes to all names beginning with “hec.” Typing three or four characters is usually enough to find the name you are looking for.

You can also type into the entry box just underneath the Window title (“Contacts”) and

This will be sufficient to find most of the information you need. To perform more advanced searches click the down arrow to the right of the binoculars and enter your search type.

**Important:** Note that throughout Time Matters, if you Right Click, you see a menu of options. If you Left Click it performs some operation.

## Journal

The Time Matters “Journal” gives you an overall view of your events for the day, similar but more complete than the one offered in Outlook. It shows your calendar, email, notes, messages and phone calls To open the Journal, either click on the icon, or select Calendar | Personal Journal (or  ).

## Archiving

In order to keep the Time Matters database “clean” and its performance optimized, it is advisable to archive old ToDos, closed Matters, etc. at regular intervals. Archived material is still available if you do a Global Search (when conflict checking, for example) and archived records can easily be consulted.

To archive material, tag the records to be archived by clicking in the little square box to the left of the item. Then click the “Process Records” icon and select “Archive Records.” If you look for an old ToDo or appointment and it “isn’t there,” check the archived records.

To view archived records, select File | Archive and the type of record you wish to view. Close the Archive window to return to the regular screen.

To un-archive records; from the Archive view, tag the records to be un-archived. Then click the “Process Records” icon and select “Retrieve Records” (when you are the normal screen, that item says “Archive” when you are in the archive screen it says “Retrieve”).

## Customizing

Most customization of Time Matters will be done at the firm-wide, or program, level. However, there are some important customization options that may make life simpler.

**Color Alternating Lines.** You can now color alternating lines to make the screen more readable (like the green lines on accounting paper). This is done under the QuickTab menu. Click on “Options”, select the desired QuickTab and click on “Change.” Click the check box next to “Show Color Lines” and then select the desired color. You may want to have different colors for different QuickTabs to differentiate them visually.

**Color Required Fields.** Fields that are required to be filled in before a record can be saved (such as Classification Code or Statute of Limitations) can be assigned a color to give you a visual reminder that the field must be filled in. To implement this feature, select File | Setup | General | User Level Setup | Forms and check the “color required fields” box. Click the “Select Color” box to select the desired color. The color should be visible but not so dark that it obscures your text.

**Screen Picture.** You can now select the picture that appears when Time Matters opens. Go to File | Setup | General | Workstation Level and click the “Graphics” tab. You can select a pre-defined option or click “Browse” to select a personal graphic of your choosing.

## Documents

Firms differ widely in how much use they make of Time Matters' document management functionality. However, some basic concepts apply almost everywhere.

### Getting Information into the Word Processor

Everyone has to type letters. With Time Matters, there is no reason ever to re-type addresses after they have been entered once. You can easily insert addresses or form letters from Time Matters to your word processor.

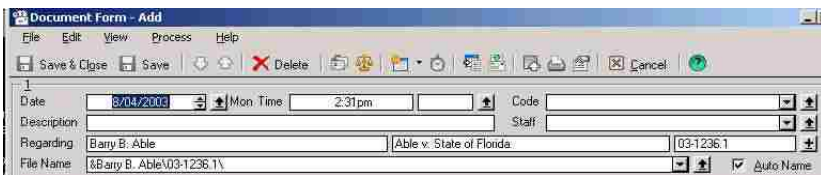
**Starting from the Word Processor**, click on the "Time Matters Insider" button. Time Matters will open and you will be asked to choose the contact to whom the letter is to be written and the format to be used (e.g., letter, label only, one of a selection of form letters). This will then be pasted into the word processor. To select from a Matter, click the "Matter" icon on the toolbar.

**Starting from Time Matters**, tag the desired contact or matter by clicking the check box to the left of the item, then click the clipboard icon (the same as the one that appears in the word processor). Again, you will be given a choice of formats. Select the format. Then switch over to your word processor and paste the address in using the paste button or **Ctrl V**.

### Referencing Documents in Time Matters.

The firm may also wish to use Time Matters to track documents, instead of your word processor/Windows Explorer.

The easiest way to save a document to Time Matters is to click the "TM Save" icon in your word processor. You will see the following screen:

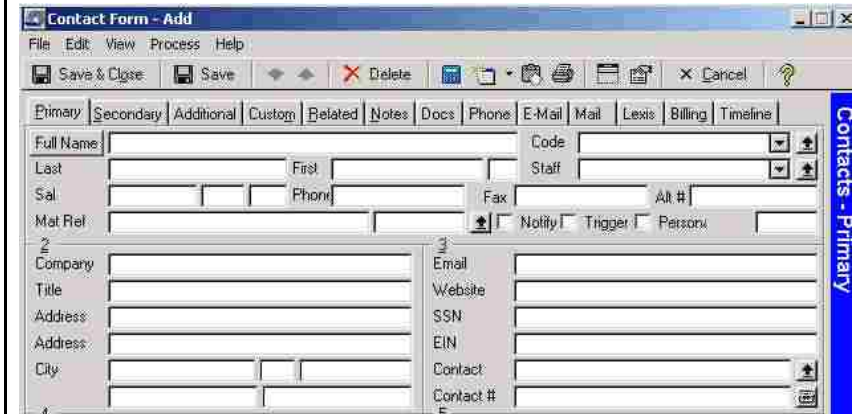


Fill in the document code (e.g., brief, contract, letter, etc.), the Staff member who drafted the document (usually the attorney, not the typist), and a description of the document. It is advisable to use a description with some content rather than, e.g., "Memo." This makes it easier to identify the document in the future.

Lastly, fill in the location of the document. The default root of your files should be indicated by an ampersand (&). Thus if all your files are stored under f:\data\wpdocs and then practice areas, or "clients" and the client name and type of document, enter "&clients\jones\memos\docname.doc" as your name (do not put a "\" after the &). Depending on the firm, some of this information may be filled in automatically.

## Contacts



When you add a new contact, you see the following screen (due to customization, your screen may not be precisely like this one):



For all new records, note that there are a number of tabs across the top that indicate all information about or related/linked to that particular Contact (or Matter, ToDo, etc.).

**Data Entry.** Data Entry is pretty straightforward. You look at the label at the left of any given entry box, and enter that information.

### Lookup Buttons.

  Any Time Matters field that has a down or down and up arrows to the right of it is a Lookup Field. This means that you enter data from a lookup table. *Clicking on the down arrow lets you make a single selection, clicking on the up arrow lets you make multiple selections (up to 5).*

**Full Name / Org Name.** If you enter a person's name under "Full Name," it is automatically split out into First, Middle Initial and Last. Prefixes and Suffixes are also put into the Prefix and Suffix fields.

Clicking on the "Full Name" button changes it to "Org Name." If you enter an Org Name, it will be put into the "Company Name" field and not split out into First, Last, etc. However, in this case, all the companies will sort before all the individuals in your list. There are two options here:

- Also enter the company name as the last name. This makes it easier to find things, but has some drawbacks in terms of document assembly.
- Leave the last name blank, and have a "two part" listing.

The main issue here is to decide which way you wish to do it and be systematic about it.

**Codes.** Assigning one or more Codes to an entry, makes it much easier to find either by using QuickTabs or other search mechanisms.

## Contacts (cont.)

The next line starts with Sal(utation) on the left. This is a frequent format in TM, in which the three fields are actually Salutation, Prefix and Suffix. The Salutation is what goes after “Dear” in the letter; the Prefix is what precedes the name in the address (Mr. John Jones). If you click in the middle field, a “tip” will pop up saying what the function of the field is.

Similarly, the lookup field on the next line that says “Mat Ref” will change depending on whether you click in the first entry box or the second. In addition, the function of the lookup also changes. If you start typing the name of the matter, the box will auto-fill until you get the right name. If you click on the lookup when the focus is on “Mat Ref” you will see a list of Matter References. If you click on the lookup when the focus is on Matter No., you will see a list of Matter Numbers. This makes it easy to find information based on which piece of it you know.

See under “Matters” for the function of the Notify, Trigger and Private boxes.

## Matters

One of the most important ways in which Time Matters can be customized is on the Matter screen. Normally, you will want to have different types of information available for different types of matters: accident information for P.I. or workers comp matters; purchase and seller information for real estate matters; family information for divorce, and so on. The generic Matter screen might look like this (although the “User” fields may well be customized for your firm’s use):

## Time Entry (cont.)

There are two other ways to enter time. By far the easiest is using the Timesheet (**Alt F6**) or click the icon on the button bar).

To make a new entry, simply click on the desired day and type the amount of time (e.g. .5 hours). An Entry screen pops up (right). Fill in the information as desired. *Note:* You may have to make adjustments later.

**Quick Item.** If you prefer to enter time in a spreadsheet view, use

Bill Date	Start	Matter	Billing Code	Desc	Billable	HourB	Total	Status
10/16/2003								
1/23/2003	8:00AM	Plummer Assault	CLOSING	Perital preparation	5.00	2.00	7.00	Billable
2/24/2003	7:43AM	Plummer Assault	OS COPES	Outside Photographs - Copies of Police Reports	4.00		4.00	Billable
2/11/2003	11:20AM	Law v. All County Insurance	PLRNG FEE	Filing Fee	1.00		1.00	Billable
2/20/2003	3:19PM	Matter v. Head Tech	COPR FEE	Corporate Kit to Incorporation	1.00		1.00	Billable

**Quick Item.** Click the button on the button bar, or **Alt F5**. Enter the data by tabbing across from field to field. If you click on the up arrow in a field, a selection box appears (double click for the selection box if there is no up arrow).

## Phone Messages

Phone messages can be taken and associated with matters in Time Matters. When you click on phone messages, you see this screen:

Completing the information is similar to other Time Matters screens. Note that In From/Out To button changes from one to the other when you click on it. The “Staff” box should be filled in with the person for whom the message is intended, the “To” box is the person who took the message.

When you take an incoming message, a message is sent to the intended recipient via TM Messenger, which pops up on the person’s desktop:

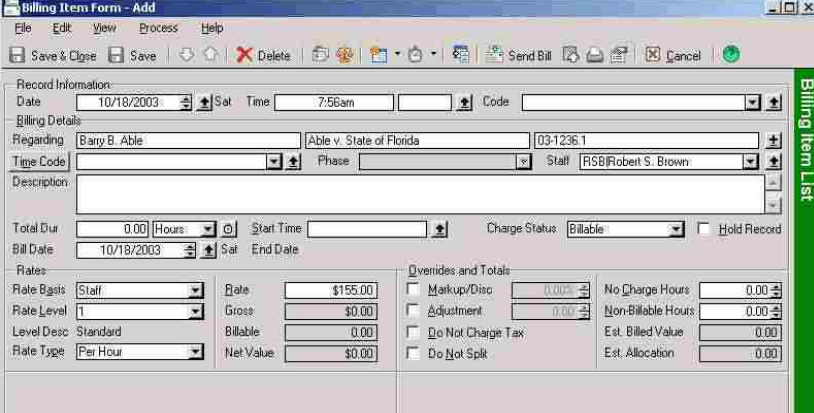
This enables the intended recipient to see the message and deal with it appropriately.

## Time Entry (Billing Matters)

If you are not also using Billing Matters, disregard this section.

There are several ways to enter time in Billing Matters. While some users may prefer some of the simpler ways, be aware that these may need to be edited before they can be billed correctly.

**Standard Time Entry.** To make a standard time entry, first select the matter for which you wish to enter time (you do not need to open the matter). Then press **Ctrl Alt B** for a new time entry. As in the screen below, note that the matter information has already been completed, as well as the person entering time:



To complete the form, fill in the following fields:

**Time.** This is the amount of time spent.

**Code.** This is the code for the activity.

**Time/Expense Code.** This field is a toggle. To enter an expense, click the button, which will change to “Expense Code.” Click again to change back to “Time Code.” Note that some other fields will change accordingly.

**Description.** Enter the description of the activity that you want to appear on the bill. *Important:* Depending on how your system is set up, the contents of the “Memo” field (not shown above) may appear on the bill. If so, type the information to appear on the bill in the “Memo” field.

**Rate Information.** Generally speaking, the rate information will be pre-configured by the system administrator. If you need to make any changes, do so in the appropriate field. When you are done, click Save & Close.

**Hold Record.** To keep this entry from being included on a bill, click here.

**Automatic Data Entry.** In some cases, standard entries or expenses (photocopies, courier, postage) may be configured so that as soon as the Code is entered in the top right field, the remainder of the form is filled out and all you have to do is enter the amount (postage) or the Quantity (photocopies).

## Matters (cont)

The top section of the screen (Section 1) will stay relatively constant even for different types of matters.

**Matter Reference** This is the main name of the matter/case. This is how information will be alphabetized by default on the Matter list, so you want to put in something that will alphabetize correctly (use last name, not first name for example).

**Code** This refers to the practice area: Personal Injury, Divorce, etc. When you fill in this area and tab to the next area, the screen will adjust to reflect the way in which you have customized TM for that practice area.

**Matter No.** This is the matter number. If you are linking with other programs (PC Law, Worldox, TimeSlips, etc.) it should be the same as the number for those programs.

**Staff.** This is the attorney(s) in charge of or working on the case. Remember that clicking on the down arrow lets you select one attorney; clicking on the up arrow lets you select up to five. If you leave this blank, everyone will see the Matter.

**Client.** This is a lookup screen. When you select the client, normally all the information for “Primary Contact” (area 2) is also filled in.

**Check Boxes.** There are also three additional check boxes which may or may not be relevant to your situation.

**Notify.** This could be used, for example, to notify a given user that a matter has been created.

**Trigger.** This lets you “trigger” other events, such as changing a field, sending a message to a particular user, etc.

**Review.** If you use the electronic review process for new matters, click this box. The matter must then be reviewed by designated people (for example, for conflicts).

**Private.** This makes the matter private to you (or to the staff listed under “staff” if there is more than one).

**Status.** This box is useful to categorize matters as, e.g., Closed, Pending, Referral, Active, etc.

The other areas will be filled in depending on the type of case it is. Fields may be available for Opposing Attorney, Statute of Limitations, Accident information, and so on.

## Additional Tabs

Additional tabs are available that offer added functionality for both Matters and Contacts. Similar tabs for “Supporting Records” offer added functionality in other areas. These include:

**Secondary, Additional and Custom.** These tabs provide screens that can include additional information concerning the matter or contact in question.

Other tabs will be dealt with in separate sections.

## Calendar

Time Matters refers to Appointments and To Dos as “Events.” You can select a Day, Week or Month view of your Events, and if you select days, you can see a customizable number of

days: by default 1, 3, 7 and 14. To view the calendar of another person (or group of people) simply click on the name of one or more persons (or groups) displayed across the top of the screen. If you display a multi-day screen (as above), you can drag and drop an appointment from one day to another (but not to a day listed on the calendar that appears at the right of the window).

Two new ways to view the calendar are available in Time Matters 5. The Parallel View lets you see each user’s calendar in its own column, which can make the information much easier to read.

The “Scheduling” View shows the various users time displayed horizontally, so that gaps in time available for scheduling meetings are immediately apparent. Double-clicking on the user shows the detail of their time.



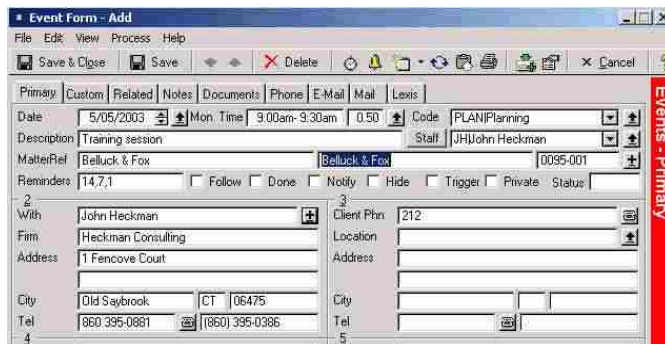
## Creating Events

As with other Time Matters functions, you create a new Event by clicking on the button with the green “+.”

By default, the date and time are the ones selected when you clicked the “new” button. You can change them manually or by selecting the drop-downs. If you type in the length of the appointment, the time will adjust automatically.

Enter the **Code**, **Description**, **Staff** and **Matter** information the same as you would in other Time Matters functions. Note that as you start typing the name, the Matter is automatically filled in. For an Appointment to link to the Matter, you *must* enter Matter information.

**Reminders** You can be reminded of a given appointment a number of days in advance. To be reminded 2 weeks, 1 week, and 1 day before the appointment, type in “14, 7, 1” in the reminder field. Clear the field to cancel reminders.



## Calendar (continued)

**Check Boxes.** Events have a number of check boxes which you may or may not wish to use in different situations.

**Follow.** If you check “Follow”, the appointment will continue to appear on your list until you mark it “Done.” Normally, this is more useful for ToDos than Appointments.

**Notify.** Checking “Notify” places a reminder on the “Alerts, Reminders and Watches” screen. This is another way of giving the event greater prominence.

**Hide/Private.** Checking “Hide” prevents the appointment from being displayed on the calendar, and checking “Private” makes it private so that others cannot see it (assuming the appropriate security has been set up)

**Trigger.** Certain types of events may have “triggers” attached to them that cause another action to take place. If so, clicking this box activates the trigger.

**Status.** Your firm may have implemented Status notations to determine, e.g., how important an event is. If so, you could for example, select all your most important events.

**Other Information.** The minimum amount of information you need to create an appointment is the amount of time it will take, a description and the relevant Matter information (if you don’t include the Matter, the appointment will go off into limbo and not be retrievable). However, the more information you enter, the more useful it will be. For example, entering an appropriate code will enable you to display all Court Appearances/ Depositions; all Real Estate Closings, etc. Similarly, entering information about who you are meeting with may make it easier to make confirmation calls, etc.

## Creating ToDos

ToDos are very similar to Appointments except that they do not have a scheduled time. Instead, they have a Priority and a Duration. The Priority makes it easy to sort your ToDos by how important they are.

ToDos are set to “follow” by default, so that they will appear on your ToDo list until you mark them “Done.”

## Notes

Notes can be used either for minor observations about a matter or contact or as the equivalent of a “Memo to File.” Since Notes are attached to a particular matter, it is easy to review the progress of a case.

In addition, you can use the “Status” field to further sort types of notes.

The text of a note can be emailed using TimeMatters or Outlook. To put the text of a note into Outlook, open the note, then click on File | Send To | Outlook recipient. The text of the note will be placed in an email message.

