

# Install Guide

for Time Matters® and Billing Matters® 11.0

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# Installing the Software

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Before you begin installing Time Matters, complete the steps in the following sections.

## 1. Determine who should install the software

The installation procedure for Time Matters is simple, but it is advisable that you choose a person familiar with your firm's computer systems, such as:

- An Information Technology professional
- A LexisNexis Certified Independent Consultant (CIC)  
To locate a CIC near you, see <http://law.lexisnexis.com/spn/findcic>
- A sole practitioner, or the person with primary responsibility for your firm's computers

## 2. Choose where to install the Time Matters database

Your first installation of Time Matters should be on the server computer that will host the application's database. Use the following checklist to select a computer.

- The computer must meet the [Time Matters system requirements](#).
- The computer must be connected to your firm's network so that all Time Matters users have access to the shared database. (If you are the only user of Time Matters in your firm, you can install the application's database on your primary work computer, even if it lacks a network connection.)
- If your firm requires a large database (4GB or more), the computer should be running Microsoft SQL Server database software. If you do not already have SQL Server, a free version (Microsoft SQL Server 2005 Express Edition) will be installed with Time Matters. This free version of the software supports a maximum database size of 4GB.

## 3. Gather needed materials and information

Have the following information on hand for your first installation of Time Matters:

- A copy of the Product Key email containing your product key and the software download link
- A user login with administrator rights on the computer where you will install the software
- The SQL Server administrator password (if SQL Server is already installed on the computer)
- (New installations only) A list of people in your firm who will be using Time Matters 11.0. Include each person's email address. This list will help you during post-installation setup when you create user accounts.

## Downloading the Software

Follow these steps to download the Time Matters installation program.

1. After purchasing Time Matters 11.0, you will receive an email with your product key and a link to download the software. Click the link to open the Product Entitlements page in your web browser.
2. Click the **New installation** link if your firm is installing Time Matters for the first time, or click the **Upgrade installation** link if you are upgrading from a previous version.
3. A web page with download and installation instructions opens.
4. After reviewing the information on the web page, click the **Download** button at the bottom of the page. Save the file to your computer, making a note of the file's location.
5. If necessary, transfer the downloaded file to the server computer where you want to install the Time Matters database.

When you are ready to begin the installation, follow the steps in the procedure "Installing the Database on Your Server" on page 7.

# Installing the Database on Your Server

After you complete all the pre-installation steps, you are ready to begin installing Time Matters. First, you must install the application and its database on your server computer.

## To Install Time Matters on the Server Computer

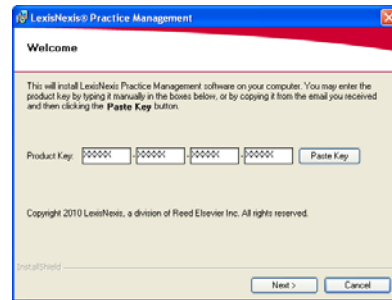
1. Close all open applications on the computer and then double-click the Time Matters installer file that you downloaded, `setupe.exe`. The installation wizard opens.
 

**Note:** If the .NET 4.0 Framework is not on your computer, it will be installed at this point. This may take several minutes to complete, during which the installation will not proceed.

### 2. Welcome Screen

Complete the **Product Key** fields. You can copy the product key in your Product Key email and then click the **Paste Key** button, or you can type the product key into the fields manually.

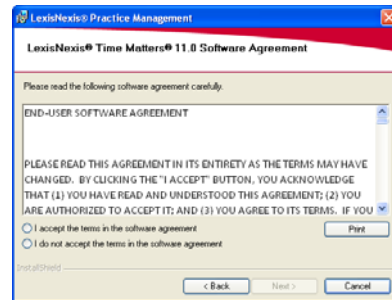
Click **Next** to continue.



### 3. Software Agreement

Review the software agreement. When you are finished, select **I accept the terms in the software agreement**.

Click **Next** to continue.

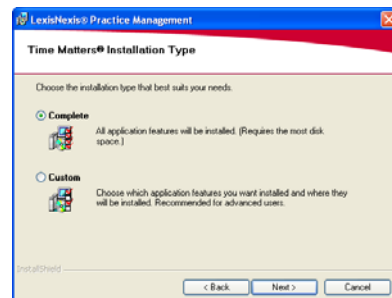


### 4. Installation Type

Select **Complete** if you want to install all program features, or select **Custom** if you want to choose the features that are installed.

Click **Next** to continue.

- If you selected **Custom**, perform the optional steps in the shaded section below.
- If you selected **Complete**, skip to step 5.

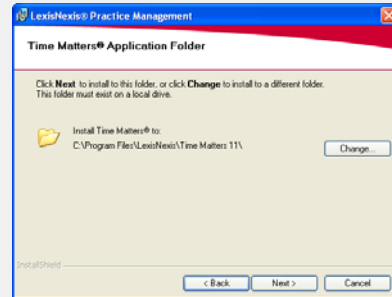


## Optional Steps: Custom Installation



### Application Folder

Specify the folder in which the Time Matters application files will be installed. To select a folder, click **Change** and browse to the desired folder, then click **OK**.

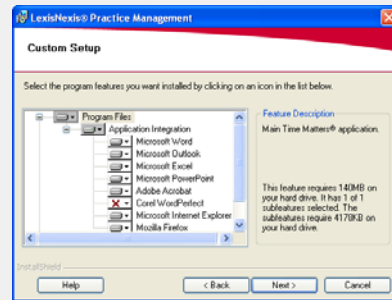
Click **Next** to continue.



### Custom Setup

Choose the program features you want to install. To change the status of a feature, click the icon beside that feature and select either the option to install the feature (  ) or the option to not install the feature (  ).

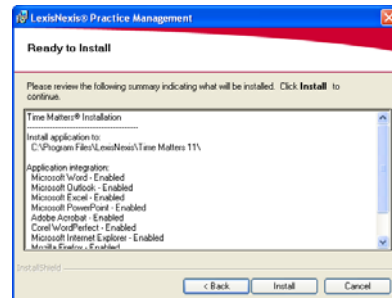
Click **Next** to continue.



## 5. Ready to Install

Review the installation settings. Click **Install** to begin the installation.

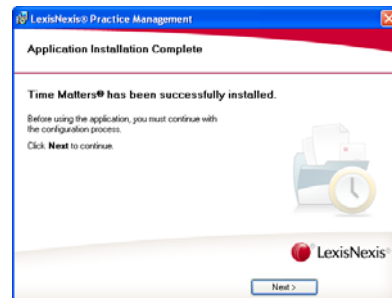
Wait for the installation process to complete.



## 6. Installation Complete

The Time Matters client application has been installed. Next, you must install the Time Matters 11.0 database (if installing on the server computer) or configure the client application to connect to the database if it has already been installed.

Click **Next** to begin the next part of the process. The Installation wizard closes and the Database Creation wizard opens.



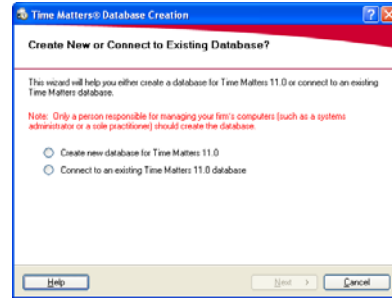
## 8 Installing the Database on Your Server



## 7. Create New or Connect to Existing Database

Select **Create new database for Time Matters 11.0** and click **Next**.

**Note:** If the database has already been installed and you are only installing the Time Matters application, *you must configure Time Matters to connect to the existing database*. To continue, go to the procedure “To Install the Time Matters Client Application” on page 14, and complete the steps in the shaded section “Setting Up the Database Connection”.

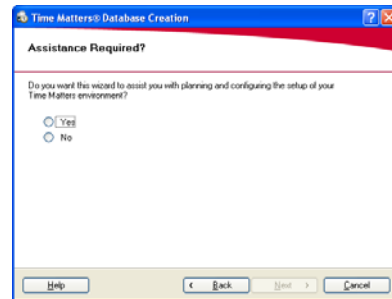


## 8. Assistance Required?

The wizard can help determine if the computer you are currently using is a good place to install the primary database. If you want the wizard to help you decide, select **Yes**. To proceed without assistance, click **No**.

Click **Next** to continue.

- If you selected **Yes**, perform the optional steps in the shaded section below.
- If you selected **No**, skip to step 9.

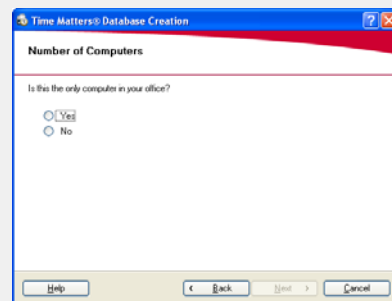


### Optional Steps: Determining Whether to Install the Database on the Current Computer

Answer the questions on each of the next screens by selecting **Yes** or **No** and clicking **Next**.

#### Number of Computers

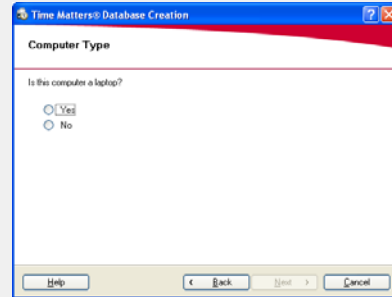
Select **Yes** if the computer you are currently using is the only one in your office, or select **No** if there are other computers in your office. Click **Next**.



### Computer Type

Select **Yes** or **No** based on the computer type. Click **Next**.

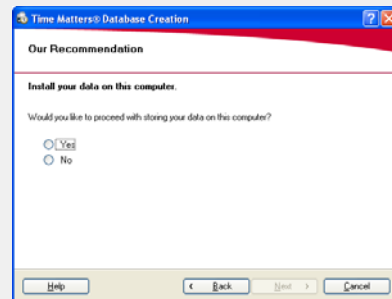
The wizard will make a recommendation based on your selection.



### Our Recommendation

Choose whether or not to proceed with the the installation by selecting **Yes** or **No** and clicking **Next**.

**Note:** If you selected **No**, the database installation will not continue. Go to the computer where you want to install the database and begin the installation procedure again.

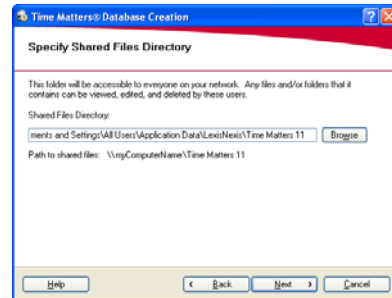


### 9. Shared Files Directory

Specify a shared folder on your network in which to store shared document files.

Click **Next** to continue.

**Note:** If you are upgrading from a previous version of Time Matters, the **Save files to** field is pre-filled with your existing shared files folder. If you specify a different folder, you must copy all the files from your previous shared files folder to the new folder so that those files will be available in Time Matters 11.0.



10. The wizard detects whether Microsoft SQL Server is already installed anywhere on your network.

- If SQL Server is not detected on your network, a free version of SQL Server will be installed. Skip to step 11.
- If SQL Server is detected, you will be asked to provide login information for the existing SQL Server installation. Complete the steps in the shaded "SQL Server Setup" section below.

## 10 Installing the Database on Your Server

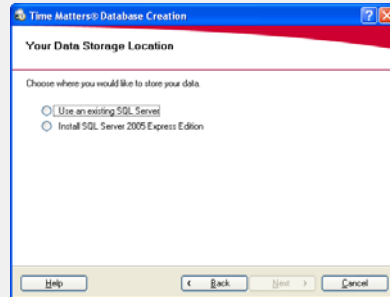
## SQL Server Setup

### Your Data Storage Location

Select **Use an existing location** and click **Next** to use an existing installation of SQL Server to create the Time Matters database.

Complete the steps in the shaded “SQL Server Setup” section below.

**Note:** Optionally, you can install SQL Server 2005 Express Edition and use it to create the Time Matters database even if you already have an existing SQL Server installation. To do so, select **Install SQL Server 2005 Express Edition** and click **Next**. Review the administrative login information and click **Next** again. Skip the remainder of this section and go to step 11.

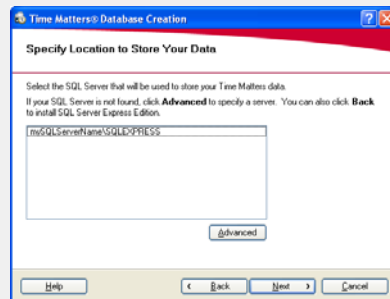


### Specify Location to Store Your Data

Select the SQL Server to use to create the Time Matters database.

If the desired SQL Server does not appear, click the **Advanced** button. Type the name of the computer running SQL Server and click **OK**. (If you have SQL Server Express Edition, type \SQLEXPRESS after the computer name.) The name you typed appears in the list of SQL Servers and can now be selected.

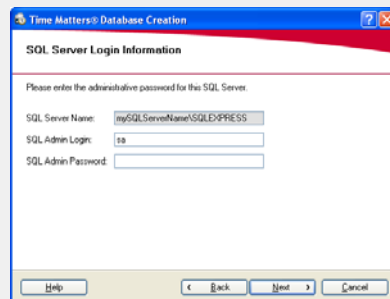
Click **Next**.



### SQL Server Login Information

Type the password of the SQL Server admin account in the **SQL Admin Password** field.

Click **Next** to continue.

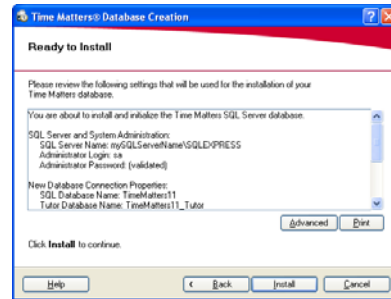


### 11. Ready to Install

Review the settings that will be used to create the Time Matters 11.0 database. If you need to modify advanced settings that control database size and growth, click **Advanced**.

When you are ready to create the database, click **Install**.

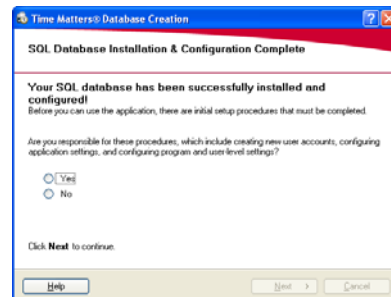
Wait for the database creation process to complete.



### 12. SQL Database Installation & Configuration Complete

Select **Yes** if you are responsible for setting up Time Matters 11.0, or select **No** if someone else will set up Time Matters 11.0.

Click **Next** to continue.

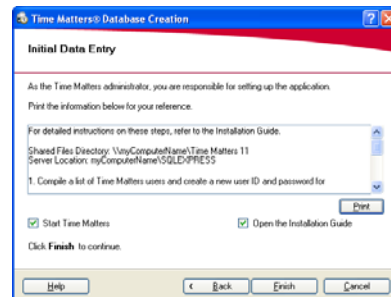


### 13. Initial Data Entry

Review the final information.

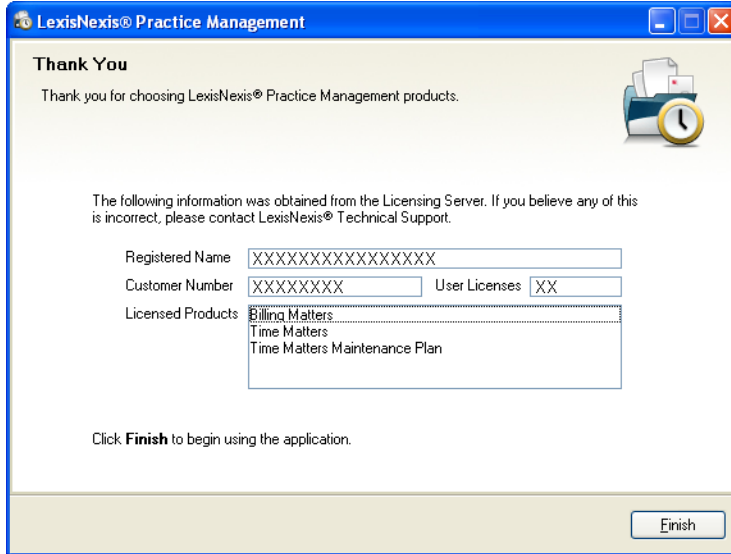
- If someone else will set up Time Matters, the wizard displays information for you to copy and send to the person who will set up Time Matters.
- If you will set up Time Matters, the wizard displays information and instructions that you should print for your reference.

Click **Finish** to close the wizard. Next, go to *Registering the Software* on page 13.



# Registering the Software

The first time you start Time Matters 11.0, the application will automatically attempt to connect to the LexisNexis licensing server so that your database can be registered.



When the registration is complete, click **Finish**. The application will start. (If you are an upgrade customer, you will be prompted to import data from your previous version of Time Matters. Instructions are available later in this guide.)

The next step is to set up Time Matters. The remainder of this guide provides instructions on how to set up the application depending on whether your firm is new to Time Matters or whether you are upgrading from a previous version.

# Installing the Client Application for Users



Before you begin installing the client application on the computers of individual users, it is recommended that you perform the setup tasks described in the section “Setting up the Software” on page 19.

There are two ways to install the Time Matters application on a user’s computer:

- **The recommended method** is to run the setup program that was created when the Time Matters 11.0 database was installed. This setup program is preconfigured with your product key and the location of the Time Matters database and shared files, so you will not have to enter that information during installation. The setup program is located in a subfolder inside your Time Matters shared files folder:

```
<sharedFilesFolder>/Setup/setupe.exe
```

- Alternatively, you can run the same setup program that was originally downloaded and used to install Time Matters on the server computer. In this case, you will be required to specify your product key, database location, and shared files folder during the installation.

In either case, use the following installation instructions.

## To Install the Time Matters Client Application

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1. Run the setup program `setupe.exe` in the `/Setup` subfolder of your Time Matters shared files folder. Your systems administrator can provide the location if needed.

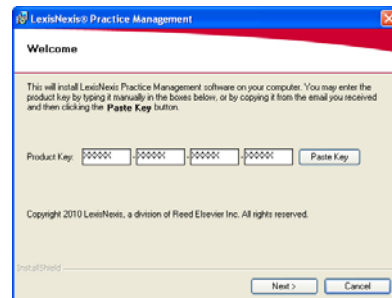
Alternatively, run the setup program that was originally downloaded and used to install Time Matters on your server.

The installation wizard opens.

2. **Welcome Screen**

If the **Product Key** fields are not already completed, type your product key in the fields.

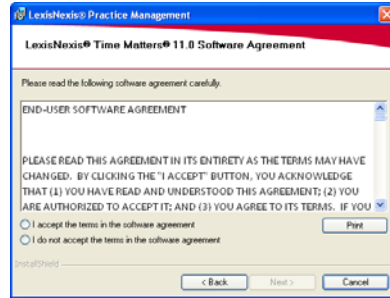
Click **Next** to continue.



### 3. Software Agreement

Review the software agreement. When you are finished, select **I accept the terms in the software agreement**.

Click **Next** to continue.

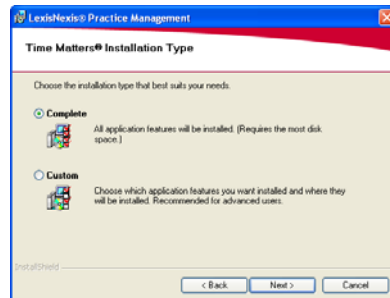


### 4. Installation Type

Select **Complete** if you want to install all program features, or select **Custom** if you want to choose the features that are installed.

Click **Next** to continue.

- If you selected **Custom**, perform the optional steps in the shaded section below.
- If you selected **Complete**, skip to step 5.

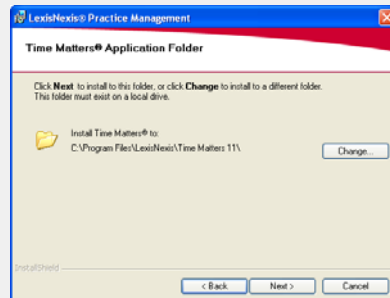


## Optional Steps: Custom Installation



### Application Folder

Specify the folder in which the Time Matters application files will be installed. To select a folder, click **Change** and browse to the desired folder, then click **OK**.

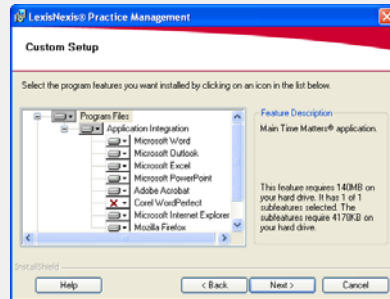
Click **Next** to continue.



### Custom Setup

Choose the program features you want to install. To change the status of a feature, click the icon beside that feature and select either the option to install the feature (  ) or the option to not install the feature (  ).

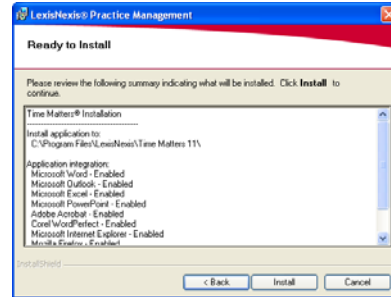
Click **Next** to continue.



### 5. Ready to Install

Review the installation settings. Click **Install** to begin the installation.

Wait for the installation process to complete.



### 6. Installation Complete

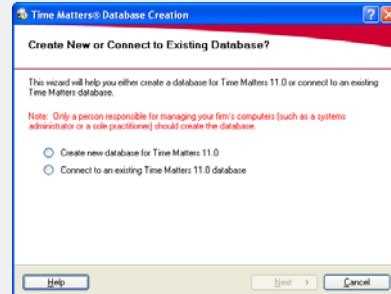
The Time Matters client application has been installed.

- **If you used the recommended setup program, you are finished.** Click **Finish** to close the installation wizard. You can start Time Matters 11.0, log in with your user ID and password, and begin using the application.
- If you used the setup program that was originally downloaded and used to install Time Matters on your server, there are additional configuration steps that you must complete. Click **Next** and complete the steps in the shaded section “Setting Up the Database Connection” below.

### Setting Up the Database Connection

#### Create New or Connect to Existing Database

Select **Connect to an existing Time Matters 11.0 database** and click **Next**.



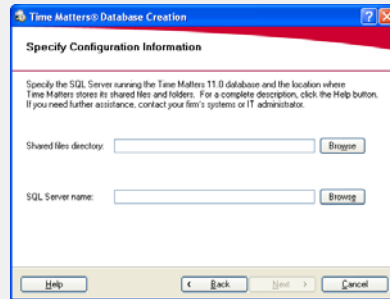


### Specify Configuration Information

Enter the Shared Files directory, or use the **Browse** button to identify the computer and folder location that is shared by all Time Matters users.

Enter the SQL Server name, or use the **Browse** button to select the SQL Server name which is used for the Time Matters database. Click **Next**.

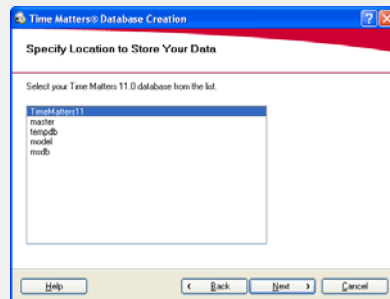
**Note:** If you see the desired SQL Server appear on the list before the search is complete, click the **Cancel** button to select from the SQL Servers discovered so far.



### Specify Location to Store Your Data

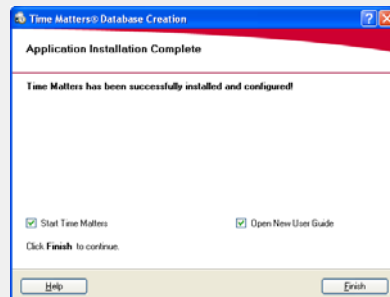
Select your Time Matters 11.0 database from the list.

Click **Next**. The Application Installation Complete screen is displayed.



### Application Installation Complete

Click **Finish** to close the wizard.



# Uninstalling the Software

## Warning!

If you currently have both Time Matters 11.0 and Billing Matters 11.0 and you only want to uninstall one of the applications, you must contact Customer Support to assist you. Do not use the following instructions for uninstalling, or it could result in loss of data.

Time Matters cannot be uninstalled without uninstalling Billing Matters, nor can Billing Matters be uninstalled without uninstalling Time Matters.

### To Uninstall the Time Matters Application

---

1. In Windows, go to **Start > Control Panel > Add or Remove Programs**.
  2. In the list of installed programs, select **Time Matters 11.0**.
  3. Click the **Remove** button.
- 

At your option, you can manually delete the folder containing Time Matters configuration files. If you plan to reinstall Time Matters with a different configuration (such as installing the database on a different SQL Server), it is a good idea to delete this folder.

The folder's default location depends on your version of Microsoft Windows:

- Windows XP:  
`C:\Documents and Settings\All Users\Application Data\LexisNexis\Time Matters`
- Windows Vista and Windows 7:  
`C:\ProgramData\LexisNexis\Time Matters`

# Setting up the Software

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After you have installed Time Matters and registered the software, you must set up the application. You should do this before other users install the application on their computers.

Initial setup steps for firms upgrading from a previous version of Time Matters are different than the steps for firms installing Time Matters for the first time. Refer to the section below (“Upgrades” or “New Installations”) that is relevant to your firm. The procedures for each task are available later in this guide.

## Setup Tasks for Upgrades

To set up an upgrade of Time Matters, perform the following tasks in order:

---

1. Ensure that PDAs and third-party applications are synchronized with your previous (pre-11.0) version of the software. For instructions, see “Setting up Handheld & Application Sync” on page 25.
  2. Import data from your previous version of Time Matters. (You will be prompted to do this automatically the first time you start the application after completing registration.) For instructions, see “Importing Data From a Previous Installation” on page 42.
  3. Send installation instructions to the Time Matters users in your firm. The information to send users is available in the last step of the import procedure. See “Importing Data From a Previous Installation” on page 42.
  4. Make an initial backup of your database and set up ongoing backups. For instructions, see “Backing Up Data” on page 21.
  5. Set up synchronization of PDAs and third-party software with Time Matters 11.0. For instructions, see “Setting up Handheld & Application Sync” on page 25.
  6. Ensure that customizations such as Lookup from File lists are copied to Time Matters 11.0. For instructions, see “Copying Your Customized Features to Time Matters 11.0” on page 47.
-

## **Setup Tasks for New Installations**

To set up a new installation of Time Matters, perform the following tasks in order:

1. Enter initial user and application settings. For instructions, refer to “Entering Initial User Information” on page 48.
  2. Create user accounts for the Time Matters users in your firm. For instructions, see “Adding New Users” on page 51.
  3. Send installation instructions to the Time Matters users in your firm. The information to send users is available in the last step of the user creation procedure. See “Adding New Users” on page 51.
  4. Set up ongoing backups of your Time Matters database. For instructions, see “Backing Up Data” on page 21.
- 

## **Additional Setup and Initial Data Entry**

There are other initial tasks that can be performed at a later time. These include:

- Entering Classification Codes
- Entering Contacts and Matters
- Entering Events and ToDo’s
- Setting up work-saving features such as AutoEntry forms, Timetables, Chain Templates, Special Dates, and Group Scheduling.

For information on how to perform these tasks, refer to the Time Matters Help file.

# Backing Up Data

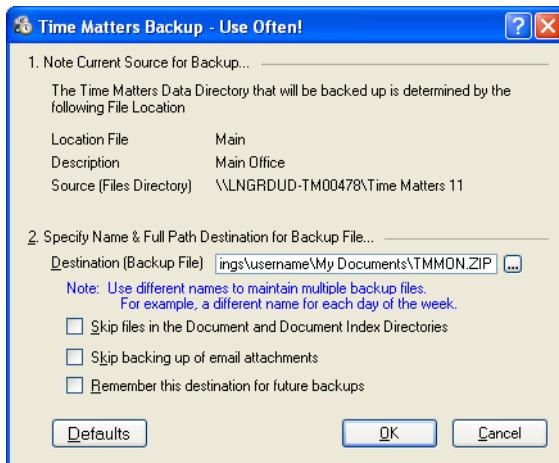
**Who should do this:** Everyone – firms upgrading from a previous version as well as firms new to Time Matters.

It is imperative that you regularly back up your Time Matters data. An incremental backup scheme, which saves only the changes made since the last backup, is not recommended.

You can back up data manually from within Time Matters. You can also schedule backups to run from the command line. The procedure for performing a backup using each of these methods is described in this section.

## To Perform a Backup From Within the Application

1. Ensure that all users have exited the Time Matters.
2. In Time Matters, click the **File** menu and then click **Back up Time Matters Data**. If any windows are open within Time Matters, an advisory screen opens to notify you that the windows will be closed.
3. The Backup screen opens and displays the data directory to be backed up.



The Location File, Description, and Data Directory information is pre-filled. The Destination (Backup File) identifies the path where documents and email attachments will be stored on your local drive. For example:

C:\Documents and Settings\*(User Name)*\My Documents\TMMON.ZIP

where *TM* indicates the product, and *MON* indicates the day the backup was performed. In this example the backup was performed on a Monday.

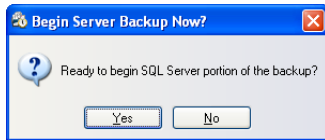
4. Do one of the following:

Leave all check boxes unchecked if you want to back up documents, document index directories, and/or email attachments.

-or-

Select the appropriate check box(es) if you do not want to back up documents, document index directories, and/or email attachments.

5. Click **OK**. The Begin Server Backup Now screen is displayed.



6. Click **Yes** to continue. The Server Backup screen opens.
  7. Click **OK** after the server database backup is complete. The Begin Backup Now screen opens.
  8. Click **Yes** to perform the backup.
- 

Use the following procedure to run command line-based backups on a routine basis using the Windows Task Scheduler.

### To Perform a Backup Using Windows Task Scheduler

---

1. Go to **Start > Control Panel > Scheduled Tasks > Add Scheduled Task**. The Scheduled Task Wizard opens.
2. Click **Next**. A list of programs is displayed.
3. Click **Browse**. The Select Program to Schedule screen opens.
4. Go to **Program Files > LexisNexis > Time Matters > TMWE.exe**. Click **Open**.
5. Select **Daily** and click **Next**.
6. Enter a time and date that the backup processes will begin. Click **Next**.  
**Note:** It is recommended that the backup process be performed when users are not actively using the application (e.g., 3:00 AM).
7. Enter your user name and password. Click **Next** to continue.  
**Note:** If a password is not entered, scheduled tasks may not run.
8. Select the **Open advanced properties for this task when I click Finish** check box.

9. Click **Finish**. The TMWE screen displays.

This screen can be used to add additional information/criteria in the **Run** field for what will be backed up.

10. Modify the **Run** field to add the `/backup` parameter:

```
"C:\Program Files\LexisNexis\Time Matters\tmwe.exe" /backup
```

**Note:** Be sure to add the `/backup` parameter *outside* the quotation marks.

Optionally, you can add other parameters to the command. A table of available command line parameters is provided at the end of this section.

11. Click **OK**.

**Note:** Please ensure that all applications are closed prior to this scheduled task being executed. The backup will not run with the application open.

---

### To Perform a Backup Using Windows Task Scheduler (Windows Vista)

---

1. Go to **Start > Control Panel > System and Maintenance > Administrative Tools > Task Scheduler**. The Task Scheduler opens.
  2. On the main menu, click **Action > Create Basic Task**.
  3. Enter a task name and a brief description. Click **Next**. The Task Trigger screen opens.
  4. Select **Daily** and click **Next**. The Daily task screen opens.
  5. Select the date and time to begin the backups. Click **Next**. The Action screen opens.
  6. Select **Start a program** under the "What action do you want to take?" heading. Click **Next**. The Start a Program screen opens.
  7. Click **Browse**. the Open Dialog screen opens.
  8. Go to **Program Files > LexisNexis > Time Matters > TMWE.exe**.
  9. Enter `/backup` in the **Add Arguments** field.  
Optionally, you can add other parameters to the command. A table of available command line parameters is provided at the end of this section.
  10. Enter the path to the program files in the **Start in** field.  
For example, `C:\Program Files\LexisNexis\Time Matters`  
Click **Next**.
  11. Click **Finish**.
-

## Install Guide - Time Matters 11.0

---

The following table shows parameters that you can add to the command line to control what information is backed up.

Command Line Parameters	Action Performed
.../tmwe.exe /backup	Full backup including emails, attachments, and documents
.../tmwe.exe /backup /noemail	Backup does not include email attachments
.../tmwe.exe /backup /nodocs	Backup does not include documents and files
.../tmwe.exe /backup /nosql	A full backup is performed, but does not include SQL backup activities
.../tmwe.exe /backup /noemail /nodocs	Database backup only (no email or document files)
.../tmwe.exe /backup /ZipDest=xxxx	Allows you to specify the destination file name, where xxxx equals the name of the file. (Can be used to prevent files with the same name from being overwritten.)
.../tmwe.exe /backup /U=xxxx	Allows you to identify which database/files directory is backed up, where xxxx equals the file name. See <i>File Locations</i> and other associated Help topics for additional information

Other argument/modifiers as shown in the Settings Selection table above can also be added (e.g., .../tmwe.exe /backup /U=xxxx /noemail /nodocs).

### Notes:

- If the **Skip files in Document and Document Index Directories** and **Skip backing up of email attachments** check boxes on the Time Matters Backup screen are checked, then these documents and/or attachments are not backed up.
- By default, a backup file is named for the day of the week on which the backup was performed. This means that each week, the previous week's backup files are overwritten by new files using the same file name (such as TMMON.zip for a backup created on Monday). If you do not want to overwrite previous backup files, you will need to type a different file name in the **Destination** field on the Backup screen.
- Audit log entries are made to indicate that the backup was successful.



# Setting up Handheld & Application Sync

**Who should do this:** Firms upgrading from a previous version of Time Matters.

When you upgrade from a previous version of Time Matters to Time Matters 11.0, you must take several steps to ensure that the handheld devices and third-party applications that you have been synchronizing with Time Matters continue to synchronize correctly. If you do not perform these steps, data might be lost or duplicated on your PDA or in applications such as Microsoft Outlook.

- Handheld devices affected: BlackBerry®, Palm®, Pocket Outlook®
- Third-party applications affected: Microsoft® Exchange, Outlook®

You must complete three tasks to ensure correct synchronization with Time Matters 11.0:

## 1 Before you install Time Matters 11.0 and import your data, synchronize all your handheld devices and third-party applications with your existing Time Matters installation (i.e., Time Matters 10.0 or earlier).

This brings your existing Time Matters database up to date with the latest information on your handheld devices and applications. When the data is imported into Time Matters 11.0, the new database will be up to date.

For instructions, refer to the online Help for your existing Time Matters installation.

## 2 Import your existing data into Time Matters 11.0.

For instructions, see “Importing Data From a Previous Installation” on page 42.

NOTE: If you imported your data into Time Matters 11.0 before performing Task 1, your database will not be up to date with the information on your handheld devices and third-party applications. **You cannot synchronize with Time Matters 11.0 at this point.** Before proceeding, you must enter unsynchronized data into Time Matters manually.

## 3 Prepare your handheld device or third-party application to synchronize with Time Matters 11.0.

This task is different for each handheld device or third-party application.

For instructions, refer to the section of this document pertaining to your specific device or application.

The following sections provide instructions on how to complete Task 3 for individual handheld devices and third-party applications. **To avoid loss or duplication of data, please make sure that you have completed the first two tasks before you proceed.**

## BlackBerry

*Before you perform the procedures in this section*, make sure that you have performed the first two tasks described under “Setting up Handheld & Application Sync” on page 25.

This section provides instructions for synchronizing BlackBerry handheld devices after upgrading to Time Matters 11.0.

In the overall process, this is Task 3: preparing the BlackBerry for synchronization with Time Matters 11.0. This task consists of two parts:

- a. Removing all Time Matters data from your BlackBerry
- b. Setting up synchronization between Time Matters 11.0 and your BlackBerry

### Removing Time Matters Data from Your BlackBerry

Use the following procedure to remove the Time Matters data and applications from your BlackBerry handheld device.

#### To remove Time Matters data and applications from your BlackBerry

---

1. Go to **Start > All Programs > BlackBerry > BlackBerry Desktop Manager** and open the BlackBerry Desktop Manager.
  2. Ensure that the BlackBerry is connected.
  3. Open the Application Loader. Click **Next** to continue.
  4. Remove the check mark from all the Time Matters applications listed.
  5. Click **Next**. The Application Loader wizard displays a list of applications to be erased from your BlackBerry.
  6. Click **Finish**. The Application Loader wizard indicates that modules/applications are being deleted.  
**Note:** Once all modules/applications are deleted, the BlackBerry device will perform a soft reboot. No user intervention is required.
  7. Click **Close** to close the BlackBerry Desktop Manager.
- 

Check to ensure that removing the Time Matters applications from your BlackBerry has also removed the data. If Time Matters data is still on your BlackBerry, perform the following additional procedure.

1. Go to **Start > All Programs > BlackBerry > BlackBerry Desktop Manager** and open the BlackBerry Desktop Manager.
  2. Go to **Backup/Restore > Advanced**. The applications that are currently installed on your BlackBerry are listed.
  3. Select all Time Matters applications in the list (i.e., Events, ToDo's). Select **Clear**.
  4. Click **OK** to remove the Time Matters data.
  5. Click **Close** to close the BlackBerry Desktop Manager.
- 

## Setting up Synchronization between Time Matters 11.0 and Your BlackBerry

Use the following procedure to set up and perform an initial wire-connected synchronization between Time Matters 11.0 and your BlackBerry handheld device. Instructions for setting up over-the-air (OTA) synchronization are available later in this section.

### To set up a connected synchronization between Time Matters 11.0 and your BlackBerry

---

1. In Time Matters, go to **File > Synchronize > BlackBerry**. The Time Matters Setup for BlackBerry screen opens.
2. Click **Yes** to install the latest files. The API Loader Wizard screen opens.
3. Select the Handheld Applications to install the BlackBerry Wireless Handheld. Click **Next**.
4. Select any additional applications to be installed on your handheld device. When complete, click **Finish**.
5. Configure Time Matters users. Highlight the user and click **Options**.
6. On the User Setup tab, enter the BlackBerry Pin and Email address. Click **OK**.  
If you click **Clear**, all settings configured for this user will be removed. Clear does not remove the data from the handheld unless you are using the Over-the-Air (OTA) method.
7. Select record types to synchronize from Time Matters to BlackBerry on the Record Type tab. Selection options are similar for each record type as detailed.

#### Events: General Tab

8. Select the **Event Record** check box. Click **Options**. The Synchronization Options for Event Records screen opens, on which you set the scope of synchronization and match fields for Event records.

The General tab lets you set several options that limit the scope of the Event synchronization.

Record options available on the General tab are:

- **Skip Time Matters Records Marked “Private”:** Records marked “Private” in Time Matters are not synchronized.
- **Synchronization can delete records in Time Matters:** If selected, Time Matters records can be deleted by the synchronization process. This normally happens when a previously synchronized record no longer exists on the BlackBerry.
- **Synchronization can delete records on the BlackBerry:** If selected, this option allows records to be deleted. When not selected, this option prevents BlackBerry records from being deleted by the synchronization process.
- **Include Events with no entry in Time Matters Staff field:** Time Matters records that have no staff in the **Staff** field, but are otherwise within the scope of the synchronization, will be synchronized.
- **Set Matching Field:** Use this button to specify which Time Matters fields correspond to the different BlackBerry fields.

### Events: Scope Tab

The Scope tab allows you to select additional settings such as Staff, Date Ranges for the records, and a customized filter based on a search.

The tabs associated with the Scope tab are as described below.

**Staff:** This option set the scope of the Event database synchronization to include All or Only the selected Staff member(s). You may select from six Staff members to include in the scope. If All Staff is selected, then there is no limit to the number of Staff members in the scope of the Event synchronization; therefore all Staff members are processed.

If one or more Staff members are selected, the scope of the Event synchronization is limited to the selected Staff member(s) only.

**Date - Synchronize Database for all Dates:** Does not limit the date scope of the Event Synchronization. All dates are considered.

**Date - Synchronize on the following Date Ranges:** Limits the scope of Events synchronization to include only Time Matters records within the defined date range.

**Filter:** Use a filter to further define what records you want to synchronize for this user.

When you are finished configuring Event options, click **OK** to return to the previous screen.

9. Synchronize other desired record types (ToDo's, Contacts, Matters, or Notes) by selecting the corresponding check box and clicking the **Options** button to define the scope of synchronization for that record type. The options are the same as those described for Events.
10. Click **OK**.
11. Open the BlackBerry Desktop Manager and click **Synchronize**. The Synchronize menu screen opens.

12. Select the **Run add-in actions** check box. The Add-in Module Configuration screen opens.
  13. Select the module(s) to be activated during the synchronization process.
  14. On the BlackBerry device, go to **Utilities > Time Matters Sync Options**. The list of Time Matters synchronization options are displayed.
  15. Turn each record type (e.g., Synchronize Contacts) on that will be synchronized.
  16. Run the BlackBerry Synchronization.
- 

Use the following procedure to set up and perform an initial over-the-air (OTA) synchronization between Time Matters 11.0 and your BlackBerry handheld device.

### **To set up over-the-air synchronization between Time Matters 11.0 and your BlackBerry**

---

1. Run `tmbbcfig11e.exe` from the Time Matters installation directory.
  2. The Synchronization for BlackBerry screen opens. Click **Next**.
  3. Select **BlackBerry Enterprise Server** as your over-the-air (OTA) Sync Method. Click **Next**.
  4. On the Server Information screen, enter server addresses for the BlackBerry Enterprise Server and the Time Matters Server. Click **Next**.
  5. On the Configure User screen, highlight a user and click **Options**. The Synchronization Options for BlackBerry User screen opens.
    - a. On the User Setup tab, enter the user's BlackBerry PIN and email address.
    - b. On the Record Types tab, select a record type and click **Options** to specify criteria for records to synchronize and rules for handling particular cases such as private records and record deletion.
    - c. When you are finished setting up options for this user, click **OK**.
  6. Repeat the previous step to configure other users. When you are finished, click **Next**.
  7. On the Setup Complete screen, click **Finish** to close the wizard.
-

## Palm Handheld

**Before you perform the procedures in this section**, make sure that you have performed the first two tasks described under “Setting up Handheld & Application Sync” on page 25.

This section provides instructions for synchronizing Palm Handhelds after upgrading to Time Matters 11.0.

In the overall process, this is Task 3: preparing the Palm handheld device for synchronization with Time Matters 11.0. This task consists of two parts:

- a. Setting up synchronization between Time Matters 11.0 and your Palm
- b. Removing all Time Matters data from your Palm handheld device

### Important Notes:

- You must synchronize twice before the Matter and the Billing applications on your Palm Handheld are accessible.
- When you synchronize, all Billing records added to the Palm Handheld are transferred to Time Matters and are cleared from the Palm Handheld device. As with synchronization, the Sync Rule applies to PDAs. You can only synchronize your Palm with one Time Matters database. Many Palms, however, may synchronize with the same Time Matters database. Do not try to synchronize your PDA with your office and home computers. Failure to follow this rule will lead to lost or duplicated data.

### Requirements

- Palm OS 4.0 or 5.0
- HotSync Manager 4.0 or 6.0

## Setting up Synchronization between Time Matters 11.0 and Your Palm Handheld

Before you can run a Palm Handheld synchronization, you must first complete the Palm Handheld Synchronization Setup.

### To set up synchronization between Time Matters 11.0 and your Palm Handheld

---

#### 1. Palm Handheld Synchronization Setup:

- a. Before proceeding with the setup, it is strongly recommended that you run a backup of the Time Matters database. Refer to *Backing Up Data* on page 21 of this manual for instructions.
- b. After running the backup, make sure Time Matters is running from its Server Database.

Ensure the HotSync Manager is closed. Check in the lower right hand corner of the screen for a circle comprising two arrows, one red one blue. Right click and Exit.

- c. Inside Time Matters, start the Palm Handheld Synchronization Setup. On the main menu bar click **File > Synchronization > Palm Handheld**. The Palm/Visor Synchronization Setup screen displays. Click **Next**.

## 2. HotSync Conduits to Install:

- a. A Conduit is a connection between the Time Matters and Palm Handheld databases, based on the record type that will be synchronized. The following Conduits connect well between Time Matters and the Palm Handheld:

Event Records, ToDo Records, Contact Records, Note Records, Email Records, Matter Records, and Billing Records

- b. Specify which Conduits you want to install between Time Matters and the Palm Handheld. In most situations, you will want to select all Time Matters Conduits.
- c. Note that setting up a conduit here will override any other conduits you have setup with databases in other programs. For example, if you have previously been synchronizing your Palm Handheld Contact list with your Outlook Contact list, setting up the conduit here for Contacts will take control of that conduit, breaking the connection between your Palm Handheld and Outlook.

- d. Click **Next**.

## 3. Specify Record Types to Synchronize:

- a. Select the record types you wish to synchronize. This is a refinement of the conduit selections. *You must have installed the HotSync Conduit for each record type you select.*
- b. To set up filters for the records that will be synchronizing, click **Options** and proceed to the next step.

To synchronize all Time Matters records regardless of Staff, Private, Done etc., click **Next** and proceed to *Six - Both Sides Changed*.

## 4. Options:

- a. Click the **Options** button for a conduit to customize the synchronization procedure for that conduit, further refining the information to be synchronized. For each of the five record types, these options fit the fact that more information is available in Time Matters than is available in the Palm Handheld. Time Matters records contain Staff, Matter Reference, and more Classification Code/Category information than the Palm Handheld.
- b. You can have the Time Matters Primary Staff Initials added to the Palm Description field (the only field available) for Events and ToDo's, added to a field of your choice in Palm Contacts, and added to the Subject field in Palm Mail.

- c. Also, you can have Time Matters add data from a Regarding Field to the Palm Handheld Notes for all record types. These Time Matters fields will appear in the Palm Handheld in square brackets (for example, [RSB] or [Brown & Brown]). If you want to add a Regarding Field reference in a Palm Handheld record, make the entry in square brackets.
  - d. You can match the Time Matters Classification Codes to Palm Handheld Categories for each record type, enhancing the organization of your Palm Handheld data. The Palm Handheld is limited to 15 Categories.
  - e. Matching can be done for Contact records, allowing you to choose which Contact record field will send data to the various Palm Handheld Phone fields.
  - f. On the Scope tab, setup allows you to select the Staff person whose records you will synchronize. The Staff setting here will override any settings made on the Filter tab. For example, if you select Synchronize Only the following Staff, and select only your own records to be synchronized, you can not then set up Filters that apply to the records of other Staff members.
  - g. Click **OK**, and **Next**.
5. **Clear Palm Data Records:**

Since the Link can transfer the entire set of Event, Contact, ToDo's, Notes and Email records from Time Matters, you might want to clear out your Palm Handheld records and start fresh with Time Matters records.

**Warning:** Do not use this if you have information in the Palm Handheld database not in your Time Matters database.

Using Time Matters to clear any database on the Palm Handheld will permanently delete any information currently stored there; if you have important information in the Palm Handheld, a backup of that information should be made.

If important information is in the Palm Handheld, make sure all the settings here read Do Not Clear Palm Records. Click **Next**.

6. **Both Sides Changed:**

- a. In the event that the same record was changed in the Time Matters and Palm Handheld databases, this screen sets how that will be handled. Three options display – to use the Time Matters record, to use the Palm Handheld record, or to use Both records. This option will result in two records in each database, allowing manual reconciliation of changes.
  - b. Click **Next**.
  - c. Setup Complete – Restart HotSync.
  - d. Click **OK**.
- 

For additional information regarding Palm Handhelds, refer to the Time Matters online Help files.



## Microsoft Pocket Outlook Synchronization Setup

**Before you perform the procedures in this section**, make sure that you have performed the first two tasks described under “Setting up Handheld & Application Sync” on page 25.

This section provides instructions for synchronizing Pocket Outlook after upgrading to Time Matters 11.0.

In the overall process, this is Task 3: preparing Pocket Outlook for synchronization with Time Matters 11.0. This task consists of two parts:

- a. Setting up and performing an initial synchronization with Pocket Outlook
- b. Setting up Time Matters for ongoing synchronization with Pocket Outlook

### Requirements

- Windows Mobile® 4.0 or 5.0
- Windows Mobile Smartphone 2003
- Microsoft Pocket Outlook running Windows CE 2.01
- Microsoft® ActiveSync®

Make sure that the Pocket Outlook device is properly connected and the supporting software is installed on your computer.

### Setting up and Performing an Initial Synchronization

#### To set up and perform an initial synchronization with Pocket Outlook

---

1. In Time Matters, click the **File** menu, point to **Synchronize**, and click **Pocket Outlook**. The Pocket Outlook Synchronization screen opens.
2. Click the **Test Link** button to confirm that Time Matters can communicate with the device.  
(If the test fails, a message appears with instructions on how to correct the problem. Click **OK** to continue.)
3. Select **Set up the Pocket Outlook Synchronization** and click **Next**. The Pocket Outlook Synchronization Setup screen appears.
4. Click **Next**. The Configuration File Location screen appears.
5. Specify a folder on your local computer in which to store configuration files for the Pocket Outlook synchronization. These files store your synchronization settings and lists of records that have been synchronized. You can type the path to the folder or click the **Lookup** button to browse to a folder.

6. Click **Next**. The Specify Record Types to Synchronize screen appears.
7. For each record type, **carefully follow the steps below** to ensure that duplicate data is not created when you synchronize.
  - a. Select the check mark beside a record type that you want to synchronize and click the **Options** button. The Options screen for that record type opens.
  - b. On the General tab, select the option to **Clear Pocket Outlook (Calendar/Tasks/Contacts) Before Synchronizing**.



This option deletes all records of this type from Pocket Outlook before you synchronize, so duplicate records are not created in Pocket Outlook or in Time Matters.

After the initial synchronization with Time Matters 11.0, return to this screen and remove the check mark from this option so that it is not used for future synchronizations.

- c. Make any additional setting choices you want on all three screen tabs. When you are finished, click **OK**.

Repeat steps a - c for each record type you want to synchronize.
  8. Click **Next**. The Synchronize Deletes screen appears.
  9. Select or clear the check boxes to enable or disable, respectively, the deletion of records in each application. If a record is deleted in one application, the synchronization process can delete that record in the other application if it is permitted to do so.
  10. Click **Next**. The Confirm Before Making Changes screen appears.
  11. Select either the option to confirm all actions before making changes to records or the option to make changes automatically. If you select the latter option, you can make additional selections to define conditions in which the synchronization process asks for confirmation before proceeding.

Click **Next**. The Outlook Sync - Setup Complete screen appears.
  12. Click **Sync Now** to perform an initial synchronization.

Follow the prompts and instructions on the screen as needed. When the synchronization is complete, click **OK**.
-

## Setting up Ongoing Synchronization

### To set up Time Matters for ongoing synchronization with Pocket Outlook

---

1. In Time Matters, click the **File** menu, point to **Synchronize**, and click **Pocket Outlook**. The Pocket Outlook Synchronization screen opens.
  2. Select **Set up the Pocket Outlook Synchronization** and click **Next**. The Pocket Outlook Synchronization Setup screen appears.
  3. Click **Next** until you see the Specify Record Types to Synchronize screen.
  4. For each record type, follow the steps below.
    - a. Select the check mark beside a record type that you want to synchronize and click the **Options** button. The Options screen for that record type opens.
    - b. On the General tab, remove the check mark from the option to **Clear Pocket Outlook (Calendar/Tasks/Contacts) Before Synchronizing**. Click **OK**.Repeat steps a - b for each record type.
  5. Click **Next** until you see the final screen of the wizard, and then click **OK**.
-

## Microsoft Outlook Synchronization Setup

**Before you perform the procedures in this section**, make sure that you have performed the first two tasks described under “Setting up Handheld & Application Sync” on page 25.

This section provides instructions for synchronizing Microsoft Outlook after upgrading to Time Matters 11.0.

In the overall process, this is Task 3: preparing Outlook for synchronization with Time Matters 11.0. This task consists of two parts:

- a. Setting up synchronization with Microsoft Outlook
- b. Performing an initial synchronization with Microsoft Outlook

### Setting up Synchronization with Microsoft Outlook

Before setting up Outlook synchronization, make sure that Microsoft Outlook is properly installed on your workstation.

#### To set up synchronization with Microsoft Outlook

---

1. In Time Matters, click the **File** menu, point to **Synchronize**, and click **Outlook**.
2. Click the **Test Outlook Link** button to confirm that the appropriate version of Outlook is installed and is communicating properly.  
(If the link fails, a message is displayed indicating that Outlook software was not found. Follow the instructions on the screen display to correct the failure. Click **OK** to continue.)
3. Select **Set up the Outlook Synchronization** and click **Next**. The Configuration File Location screen displays.
4. Specify a folder on your local computer in which to store configuration files for the Outlook synchronization. These files store your synchronization settings and lists of records that have been synchronized. You can type the path to the folder or click the **Lookup** button to browse to a folder.
5. Click **Next**. The Specify Record Types to Synchronize screen opens.
6. Select each record type as required. Click the **Options** button for each applicable record type and Staff, and select the options under each tab (General, Date Range, Outlook Folders, Codes). Click **OK** to close the Outlook Link Options screen.
7. Click **Next** to continue. The Synchronize Deletes screen opens. Use the default selections, or select each option as applicable. Click **Next**.
8. The Confirm Before Making Changes screen opens.

9. Select either the option to confirm all actions before making changes to records or the option to make changes automatically. If you select the latter option, you can make additional selections to define conditions in which the synchronization process asks for confirmation before proceeding.

Click **Next**. The Outlook Sync - Setup Complete screen appears.

10. Perform one of the following:

Click **Sync Now** to initiate the synchronization process now.

-or-

Click **OK** to complete the Outlook Synchronization Setup process at a later time.

**Note:** If you did not initiate the synchronization process in *Step 9*, then you must synchronize Outlook and Time Matters databases at a later time. See *Performing an Initial Synchronization with Microsoft Outlook* below for instructions.

---

## Performing an Initial Synchronization with Microsoft Outlook

Complete this procedure only if the Outlook and Time Matters databases were not synchronized when the Outlook Synchronization process was initially set up.

### To Initiate Microsoft Outlook and Time Matters Synchronization

---

1. Inside Time Matters go to **File > Synchronize > Outlook**.
2. Select **Run the Outlook Synchronization Now**.

**Note:** This check box will be selected by default if Outlook Synchronization was previously set up, but not synchronized.

3. Click **Begin Sync**.
-

## Microsoft Exchange Synchronization Setup

**Before you perform the procedures in this section**, make sure that you have performed the first two tasks described under “Setting up Handheld & Application Sync” on page 25.

This section provides instructions for synchronizing Microsoft Exchange after upgrading to Time Matters 11.0.

In the overall process, this is Task 3: preparing Microsoft Exchange for synchronization with Time Matters 11.0. This task consists of the following parts:

- a. Downloading and installing the Exchange Synchronization Server
- b. Setting up synchronization with Microsoft Exchange

### To download and install the Exchange Synchronization Server

---

1. Go to the Time Matters download page linked to in your product entitlement email. At the bottom of the download page, click the link to download the Exchange Synchronization Server setup program (`setupex.exe`). Save the program to your computer.
2. Run `setupex.exe`. The installation wizard opens.
3. Click **Next** to continue past the welcome screen of the wizard.
4. Review the license agreement. Select **I accept the terms in the license agreement**. Click **Next**.
5. If you want to choose a destination folder for the installation other than the default folder, click **Change**. Browse to the desired folder and click **OK**.

**Note:** The destination folder cannot be on a network drive, and cannot be the same folder in which Time Matters is installed.

Click **Next**.

6. Enter information about the Time Matters SQL Database to which Microsoft Exchange data will be synchronized.
  - a. Type the name of the server running the database, or click **Browse** and browse to the server computer.
  - b. Type the name of the database, or click **Browse** and browse to the database.

Click **Next** when you are finished entering Time Matters SQL Database information. The setup program will verify that it can access the database using the information you entered.

7. Click **Install** to begin the installation.
  8. Click **Finish**.
-

### To set up synchronization with Microsoft Exchange

---

1. On the Windows **Start** menu, point to **All Programs**, then point to **LexisNexis**, then point to **Time Matters - Exchange Synchronization Configuration**. The Exchange Synchronization Setup Configuration screen is displayed.
2. Optional step. If you do not want to import Exchange Sync data from a previous installation, proceed to the next step.  
To import Exchange Sync data:
  - a Click **Import Exchange Sync Data**. The Time Matters Exchange Synchronization Import screen is displayed.
  - b Enter the SQL Server name, Database name, User ID and password.
  - c Click **Test**. A Test Succeeded message is displayed. Click **OK**.
  - d Click **OK** on the Time Matters Exchange Synchronization Import screen to complete the import process.
3. Click **Next** on the Time Matters Exchange Synchronization Setup Configuration screen. The Contact Synchronization Options screen is displayed.
4. Set up options for Contact synchronization:
  - a. Select **Synchronize Contact Records** to enable Contact synchronization.
  - b. Determine whether Time Matters and Exchange are permitted to add, change, or delete Contacts in each other's databases, and select the corresponding check boxes to permit those actions.  
**Caution:** Most organizations should NOT change the default settings that allow both applications to make additions, changes, and deletions.
  - c. For the *initial* synchronization, select the option to synchronize no Contacts or all Contacts.
  - d. Click **Contact Field Matching** to open a new window in which you can select fields on the Time Matters Contact form and match them to fields in Exchange Contacts.
  - e. Click the **Filter** tab to define search criteria for Contacts using an Advanced Search. Only Contacts that match these search criteria will be synchronized.
5. When you are finished setting up Contact synchronization, click **Next**.
6. Set up options for Event synchronization:
  - a. Select **Synchronize Event Records** to enable Event synchronization.
  - b. Determine whether Time Matters and Exchange are permitted to add, change, or delete Events in each other's databases, and select the corresponding check boxes to permit those actions.

**Caution:** Most organizations should NOT change the default settings that allow both applications to make additions, changes, and deletions.

- c. Click **Event Field Matching** to open a new window in which you can select fields on the Time Matters Event form and match them to fields in Exchange Events.
  - d. Click the **Filter** tab to define search criteria for Events using an Advanced Search. Only Events that match these search criteria will be synchronized.
7. When you are finished setting up Event synchronization, click **Next**.
8. Set up options for ToDo synchronization:
- a. Select **Synchronize ToDo Records** to enable ToDo synchronization.
  - b. Determine whether Time Matters and Exchange are permitted to add, change, or delete ToDo's in each other's databases, and select the corresponding check boxes to permit those actions.

**Caution:** Most organizations should NOT change the default settings that allow both applications to make additions, changes, and deletions.

- c. Click **ToDo Field Matching** to open a new window in which you can select fields on the Time Matters ToDo form and match them to fields in Exchange ToDo's.
  - d. Click the **Filter** tab to define search criteria for ToDo's using an Advanced Search. Only ToDo's that match these search criteria will be synchronized.
9. When you are finished setting up ToDo synchronization, click **Next**.
10. Set up synchronization options for each Time Matters user:
- a. Click the **Add** button. The User Sync Form window appears.
  - b. Select a user from the drop-down list in the **User name** field.

**Note:** Each Time Matters user can only be linked to one Exchange mailbox.

- c. Enter the user's Exchange account information in the corresponding fields: **Username, Password, Domain, Mailbox URL** and **Email**.

**Tip:** If you leave the **Password** field empty, Time Matters prompts the user for the password the next time Time Matters attempts to connect to Exchange.

**Note:** The setup form remembers the Domain, Mailbox URL and Email of the first user you enter, and automatically completes the first part of those fields for users you enter subsequently. For this reason, it is best if the first user you enter shares the same Domain, Mailbox URL and Email format as most other users.

- d. Click **Test Connection** to ensure that Time Matters can access the user's Exchange account.



- e. Select the types of records you want to synchronize for this user, and clear the record types you do not want to synchronize. You can opt to mark as "Private" the records that are added to Time Matters.
  - f. Click **OK** to save the synchronization settings for this user.
11. When you are finished setting up synchronization settings for all users, click **Next**.
  12. Determine how to resolve conflicts between data entered in Time Matters and data entered in Exchange, such as when different phone numbers are entered for the same Contact record.
    - a. Select the option to use the most recent version of the record regardless of the application, to use the Time Matters record always, or to use the Exchange record always.
    - b. Click **Next** to continue.
  13. If you want to run an initial synchronization for the newly added user accounts displayed in the list as soon as you close the configuration program, select **Run initial sync for the new users**.
  14. Click **Finish** to close the configuration program.
  15. Click **OK**.
  16. If your Time Matters Exchange Synchronization service has been stopped, click **Yes** to start it. Otherwise click **No**.
-

# Importing Data From a Previous Installation

**Who should do this:** Firms upgrading from a previous version of Time Matters.

If you are upgrading from an earlier version of Time Matters or Billing Matters, after the new application is fully installed, you will be prompted to import and/or convert your existing data.



**Important:** Be sure you have an up-to-date backup of your previous version of Time Matters **before** importing data into Time Matters 11.0.

When you start Time Matters 11.0 for the first time, the import wizard will open automatically if a previous version of the product is detected. If you are not ready to import your data and settings at that time, you can cancel the import procedure. When you are ready to perform the import procedure, open Time Matters and go to **File > Import/Export > Import Records > Time Matters**, where **x.x** equals the Time Matters version number from which you are importing.

**Note:** The following procedure describes importing from Time Matters 10.0. Importing from earlier versions may involve different steps. Follow the instructions given by the import wizard.

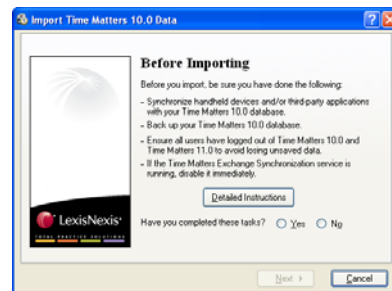
## To Import Data from Time Matters 10.0

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1. Perform the import on a computer where Time Matters 10.0 is currently installed and connected to the 10.0 database. If necessary, install Time Matters 11.0 on the computer now. When both versions are installed on the computer, open Time Matters 11.0.
2. In Time Matters, click the **File** menu, point to **Import/Export**, then point to **Import Records**, and click **Time Matters 10.0 Data**.
3. Click **Next** until you see the screen with the heading **Before Importing**.
4. Before you import Time Matters data, you should make sure that users have synchronized their handheld devices with your earlier Time Matters version, and that third-party applications such as Microsoft Outlook and Exchange have also been synchronized with the previous database. When this has been done, back up the database.

Additionally, make sure that all users have logged out of Time Matters and that the Microsoft Exchange Synchronization service is not running on the computer.

If all of these tasks are complete, select **Yes** and click **Next** to proceed with the import.



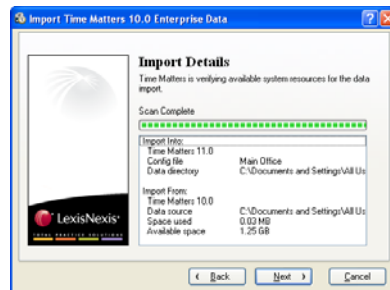
5. Select the Time Matters configuration file associated with the data you want to import.

Click **Next** to continue.



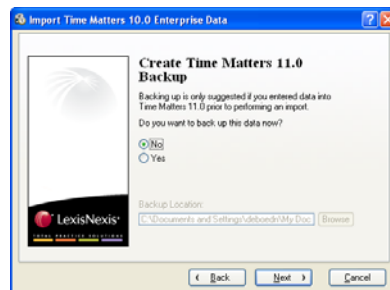
6. Time Matters scans your computer to verify that there is sufficient hard drive space to import the data.

Click **Next** to continue.



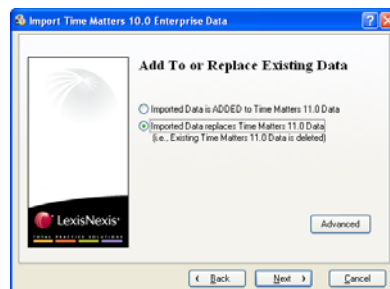
7. Because you are importing data into an empty Time Matters 11.0 database, you do not need to back up the database before proceeding. Select **No** and click **Next**.

**Caution:** If you opened Time Matters 11.0 and entered any new data before this import procedure, you should select **Yes** to create a backup of your Time Matters 11.0 database.



8. Because the Time Matters 11.0 database is empty, it is safe to overwrite it with the imported data. Select **Imported Data replaces Time Matters 11.0 Data** and click **Next**.

**Caution:** If you opened Time Matters 11.0 and entered any new data before this import procedure, you should select **Imported Data is ADDED to Time Matters 11.0 Data** instead.



9. Review the import settings. Click **Next** when you are ready to begin importing.

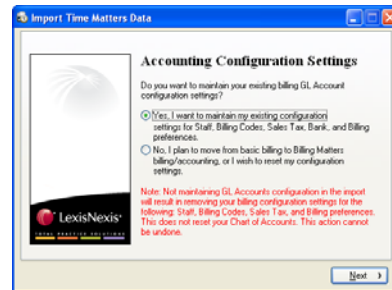
Wait until the import process is complete.



10. If you have Billing Matters, you must choose whether to maintain your existing accounting settings (if any) or to start with default accounting settings.

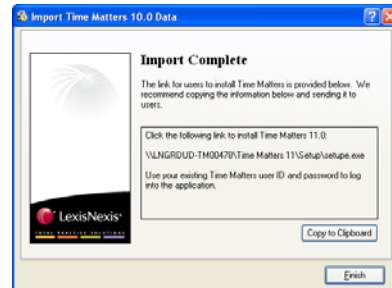
- If you used Billing Matters in your previous version of the product, you should select **Yes** to maintain your existing settings.
- If you are new to Billing Matters, you should select **No** to start with new default settings.

Click **Next** to continue.



11. The final screen of the wizard provides the location of the installation program that users in your firm should run to install Time Matters 11.0 on their computers.

When this installation program is used to install Time Matters, the program will be pre-configured to connect to your version 11.0 database. Copy the information on this screen and send it to each Time Matters user in your firm.



12. After completing the Import procedure, exit and restart the Time Matters 11.0 application.
-

## Converting Billing Data

If you were using Time Matters and entering Billing records and/or creating Invoices in Time Matters, there is some information on the Program Level specific to billing that you had set up.

The conversion process brings information such as Bill Codes, Rate Tables, Sales Tax Rates and Groups, next Invoice Number, Invoice Layouts, Payment Terms and Messages into Billing Matters 11.0. This can be done using options on the Billing Setup navigator.

### Before You Start Converting Billing Data

Before you import or convert your data from an existing version of Time Matters, or Billing Matters without Accounting installation into Billing Matters 11.0 with Accounting, use the Billing Matters Setup wizard to set up billing and accounting features such as the Chart of Accounts. This is important because the Accounts are assigned in many areas within the Program Level settings in addition to Bill Codes, Staff, Sales Tax, Client Billing Preferences and Bank, Fund, or Credit Card Accounts.

### Converting Billing Data Imported from Time Matters 9.0 or Earlier to Billing Matters 11.0

Billing records and invoices previously created using Time Matters will be converted to Billing Matters 11.0. Billing records that were on an invoice will be marked as “Billed”, and any invoice will be marked as “Posted and Paid”. Although the invoices are brought forward into Billing Matters, payments are not tracked by Time Matters, and therefore they must be marked “Paid”. Client balances will not come forward to Billing Matters 11.0. You will need to enter balances brought forward in Billing Matters. You can enter Opening Balances as a total or by invoice using the option **Enter Opening Balances** on the Billing Setup navigator.

**Note:** You must post invoices after entering opening balances.

Any unbilled billing records will be reflected at the value they had in Time Matters and will be available for billing.

### Converting Billing Data Imported from Billing Matter 10.0 or Earlier to Billing Matters 11.0

All Billing Matters 10.0 data and settings are converted to Billing Matters 11.0 without user intervention.

## Converting to Billing Matters 11.0 With Accounting

When converting from previous versions of Billing Matters to Billing Matters 11.0 with Accounting, you will need to:

- reset your Assurance Levels and reassign your Default General Ledger Accounts on the Program Level
- assign General Ledger Accounts to the appropriate records, e.g. Bill Codes, Staff, Sales Tax, Client Billing Preferences, and Bank, Fund, or Credit Card Accounts.

If you were posting transactions to a text file or to QuickBooks, anything that was posted in Billing Matters 10.0 or earlier will be converted as posted. Any transactions such as Payments, Refunds, Credits, Write-Offs and other Fund Activity, Open Invoices and Unbilled Billing records will remain intact as expected.



If you already have Billing Matters with Accounting implemented, then all Billing Matters with Accounting data and settings are converted to Billing Matters 11.0 With Accounting without user intervention.

Billing Matters 11.0 ships with a default Chart of Accounts included for your convenience. If you choose not to use the default Chart of Accounts, you can set up your own Chart of Accounts from within Program Level Setup. Click the **Billing** tab and the **GL Accounts** subtab. Click the **Setup Chart of Accounts** button. As an alternative, you can set up the Chart of Accounts when you run the Billing Matters Setup wizard (also accessible from the Billing tab of Program Level Setup).

You can import a Chart of Accounts by:

- using the Generic CSV file format
- importing your Chart of Accounts from QuickBooks

Once you have set up your Chart of Accounts, back up Billing Matters 11.0 and run Database Utilities on the source data before you import your Time Matters or Billing Matters data.

## Copying Your Customized Features to Time Matters 11.0

Some user-customizable features are based on files external to Time Matters. These files must be manually copied to the correct locations in order for the customizations to be available in Time Matters 11.0.

### Custom Power Views

Time Matters lets you create customized Power Views to display on record lists. The files for custom Power Views are stored in your Time Matters `\data\template\powerview` folder.

You will need to manually copy the files for custom Power Views to your installation of Time Matters 11.0.

Locate the `\data\template\powerview` folder in your previous installation of Time Matters. Copy the subfolders containing custom Power Views and then paste them into the equivalent folder for Time Matters 11.0:

Windows XP: `C:\Documents and Settings\All Users\Shared Documents\LexisNexis\Time Matters\template\powerview`

Windows Vista and Windows 7: `C:\ProgramData\LexisNexis\Time Matters\template\powerview`

### Custom Drop-Down Field Values

Time Matters lets you create a custom list of values to use as the selectable values in drop-down record fields. (This is the “Lookup from File” option you see when customizing a record field as a Lookup field.) These custom values are stored in text files (with the file extension `.csv`, `.dbf`, or `.txt`) located in the Time Matters `\files\lookup` folder.

If you are using custom drop-down field values in your previous version of Time Matters, you will need to manually copy the text files in which those values are defined to your installation of Time Matters 11.0.

Locate the `\files\lookup` folder in your previous installation of Time Matters. Copy the files in it and then paste them into the equivalent folder for Time Matters 11.0:

Windows XP: `C:\Documents and Settings\All Users\Shared Documents\LexisNexis\Time Matters\lookup`

Windows Vista and Windows 7: `C:\ProgramData\LexisNexis\Time Matters\lookup`

# Entering Initial User Information

**Who should do this:** Firms installing Time Matters for the first time.

After the application has been installed, some initial set up and data entry tasks must be performed before it can be used by others. These initial setup and data entry tasks are normally performed by the product administrator using the administrator's account that is created once the application is opened for the first time.

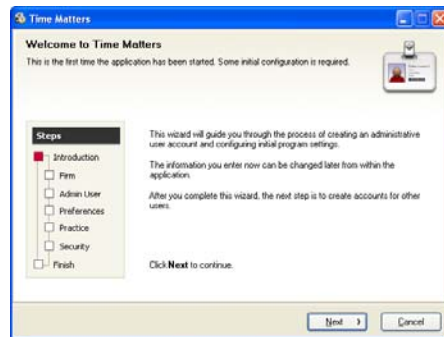
By default, the Initial User Account is given privileges and access rights to create other user accounts, perform initial setup and data entry tasks, and the ability to perform other administrative tasks not able to be performed by other general users.



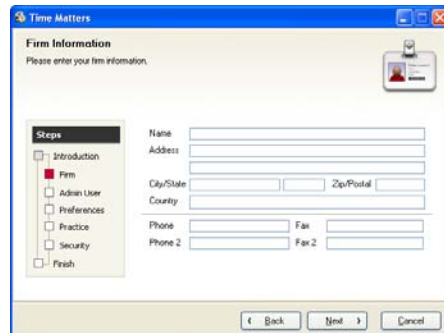
If you are required to import data from an existing version of Time Matters after installing Time Matters 11.0, then the Initial User wizard will not open if an administrative account previously existed.

## To Add the Initial User Information

1. Click **Next** to continue past the Welcome screen.



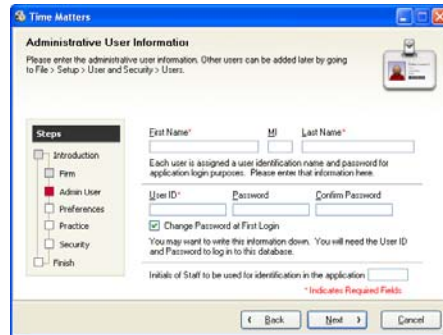
2. Review the software agreement. Select **I Accept** and click **Next**.
3. Enter the name, address, and phone/fax numbers of your firm.  
Click **Next**.





- Enter the name of the initial user, a User ID, and a password. You will use the User ID and password to access the application. A Staff member will also be created for this user account. The Staff initials are based on the initials of the names you enter. You can change the Staff initials at your option.

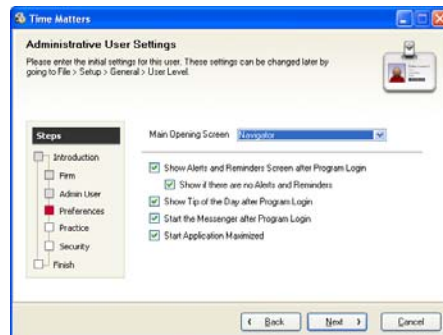
Click **Next**.



- Select the options you want in effect when you log in. These options are specific to your User ID, and can be changed later.

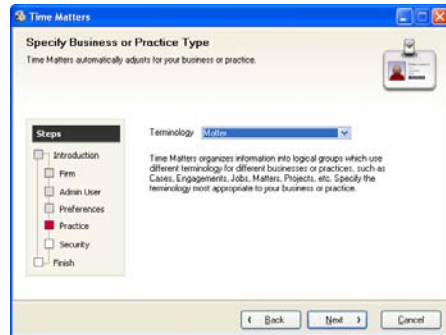
- Main Opening Screen:** Select the program screen you want to open automatically. If you do not want a screen to open, select "Main Menu".
- Show Alerts and Reminders Screen after Program Login:** If selected, the Alerts, Reminders and Watches screen opens automatically.
- Show if there are no Alerts and Reminders:** If selected, the Alerts, Reminders and Watches screen opens even if there are no Alerts or Reminders to display for the current day.
- Show Tip of the Day after Program Login:** If selected, the Tip of the Day screen opens automatically.
- Start the Messenger after Program Login:** If selected, the Messenger opens automatically. The Messenger runs in a separate window from the main application.
- Start Application Maximized:** If selected, the application opens in a maximized window.

Click **Next**.



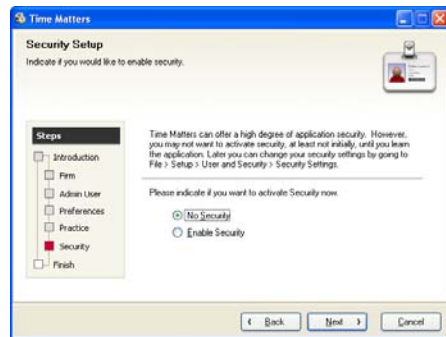
6. Select the Terminology type applicable to your business or practice.

Click **Next**.



7. Determine whether to activate Security now. To activate Security at a later time, select **No Security**. If you want to activate Security now, select **Enable Security**.

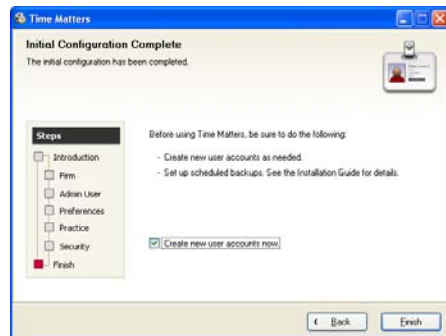
Click **Next**.



8. You have finished entering initial user information and application settings. Click **Finish** to close the Initial User wizard and start Time Matters.

Next, you must create new user accounts to allow other users to use the application. See *Adding New Users* on page 51.

You should also set up scheduled backups. See "Backing Up Data" on page 21.



# Adding New Users

**Who should do this:** Primarily, firms installing Time Matters for the first time. All firms require this procedure to create new Time Matters user accounts.

A user is anyone who can log in to Time Matters and view, change, or enter data. Everyone who uses the application needs a user account.

## To Add a New User

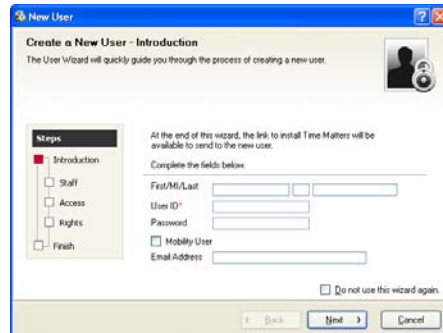
1. Open the New User wizard:
  - a. In Time Matters, click the **File** menu, point to **Setup**, then point to **User and Security**, and then click **Users**. The List of Users opens.
  - b. Click the **Add** button. The New User wizard opens.

**Note:** If the New User wizard is disabled, the User Form will open instead. Close the User Form and the List of Users, and enable the New User wizard by opening User Level Setup (**File > Setup > General > User Level**) and selecting the **Security** check box below the heading Other Wizards.

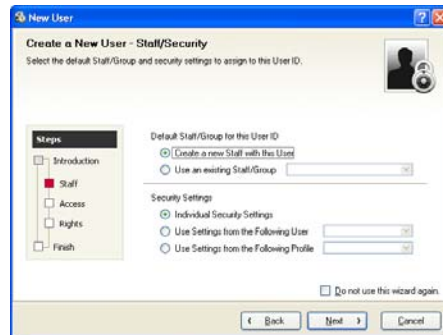
2. Click the **Add** button. The New User wizard opens.

Enter the First Name, Middle Initial, Last Name, and a unique User ID for this user. A password is optional, but recommended.

Click **Next** to continue.



3. Use the default selections on this screen to create a new Staff for this user.



4. Select the applicable security settings for this user.

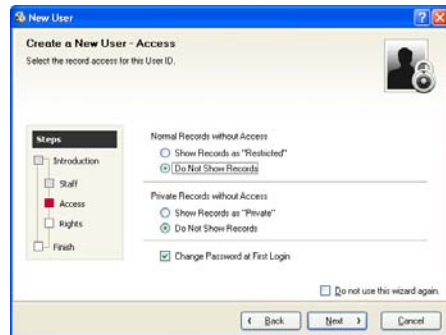
If this user will have the same or similar security settings as other users, then you can select **Use Settings from the Following User** or **Use Settings from the Following Profile** to copy settings from an existing user or from a security profile, respectively.

Click **Next** to continue.

5. Select the user's access privileges for normal (non-private) and private records.

If you select **Show Records as "Restricted"** or **Show Records as "Private"**, the user will be able to see that the records exist, but will not be able to view or open the records.

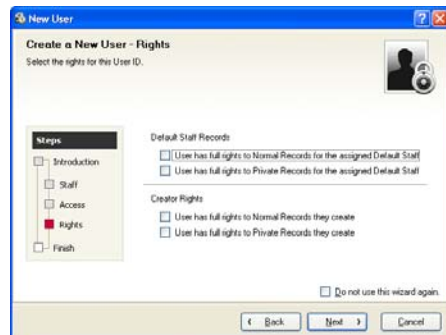
Click **Next** to continue.



6. Set special security exceptions for records the user cannot normally access. You can allow the user to access records assigned to that user's default Staff and/or to records that the user created, even if other security settings would normally deny the user access to those records.

Select the check box beside each type of record to which you want to grant the user access.

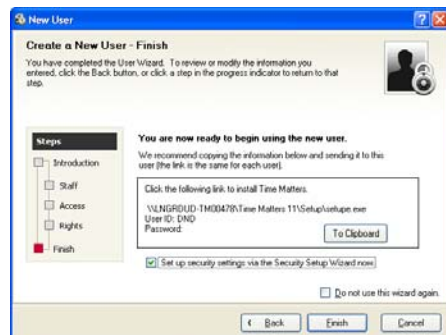
Click **Next** to continue.



7. The text box on this screen contains the user name and password of the new user account, and a link to the installation program that users should run to install Time Matters.

Click the **To Clipboard** button to copy the information in the text box. Then create an email addressed to the new user and paste the information into the body of the email.

Click **Finish**. If you are creating a new Staff for the user, see *Adding Staff* on page 53.



# Adding Staff

**Who should do this:** Primarily, firms installing Time Matters for the first time, as a follow-up step to the creation of new user accounts. All firms require this procedure to create new Time Matters Staff.

Whereas a user is anyone who uses the application, a Staff is a person (or resource) for whom a calendar is maintained and to whom records are assigned. Although there is often a one-to-one relationship between Users and Staff, not all users require their own Staff entries, and a Staff might not be associated with any user, such as a Staff that represents a conference room or other resource whose availability can be tracked on a calendar.

Like many wizards, the New Staff wizard can be enabled or disabled on the User Level Setup screen, but is on by default.

## To Add New Staff Using the New Staff Wizard

1. Perform one of the following:

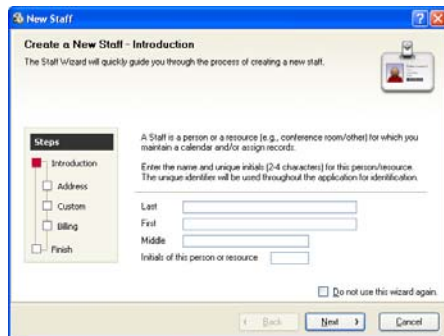
If the New Staff wizard is displayed based on adding a new user, then proceed to Step 2.

-or-

To open the New Staff Wizard, go to **Database > Staff**. Click **Add** from the Staff Resource List screen.

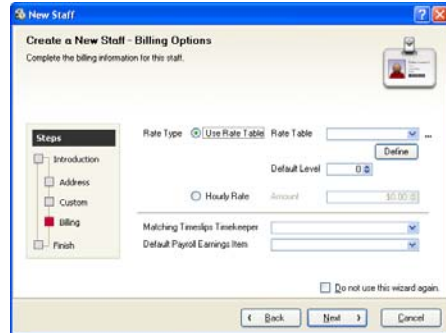
2. The Create a New Staff - Introduction screen opens.

**Note:** If the New Staff wizard is accessed based on adding a new user, the Create a New Staff - Introduction screen fields are already populated. Click **Next**.



3. Complete the Address, Home, and other fields as applicable. Click **Next**.
4. Complete the Create a New Staff - Custom screen as applicable. Click **Next**.
5. Click the **Color** button to designate a color for the records assigned to this Staff. The Select Color screen is displayed.
6. Select the color designated for this Staff. Click **OK**. The Create a New Staff - Custom screen opens displaying the color selected for this Staff. Click **Next** to continue.

7. Complete the Create a New Staff - Billing Options screen for this Staff as applicable. Click **Next**.



8. The Create a New Staff - Finish screen displays. Click **Finish**.  
**Note:** If the *Set up security settings via the Security Setting wizard now* check box is selected, then security for this user will be set up at this time.
  9. The Security Setup Wizard opens. See *Security Setup Wizard* on page 55 for instructions.
-

# Security Setup Wizard

**Who should do this:** Primarily, firms installing Time Matters for the first time, as a follow-up step to the creation of new user accounts. All firms require this procedure to manage user access to Time Matters and its data and features.

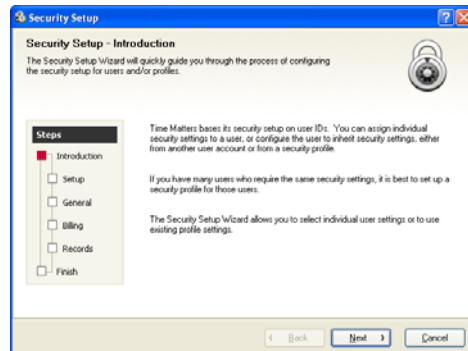
Time Matters security controls access to the program as a whole, to individual program features, and to program data. Use Time Matters security features to control how users can access records and features from within the application.

**Note:** Time Matters security is not a replacement for your firm's network security system. You are responsible to secure your network's computers and data.

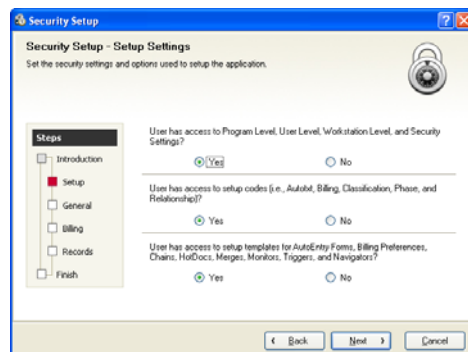
To set up security/security profiles, you must be logged in with a user ID that has access to security (typically an administrative user account). This safety measure prevents a user from permanently locking the security options for all users. If security is active, then at least one user must have the access rights to change the security settings.

## To Set Up a User's Security Profile

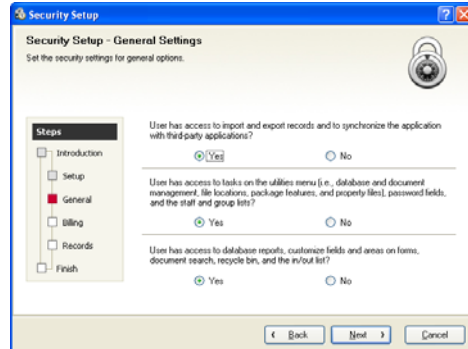
1. Review the Security Setup - Introduction screen.  
Click **Next** to continue.



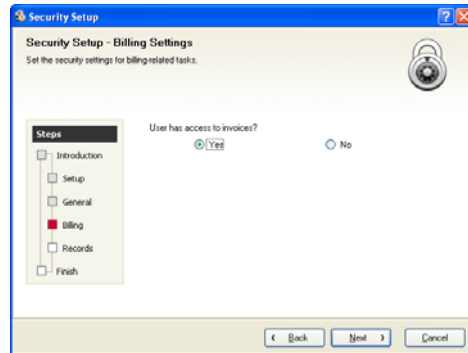
2. Select the applicable Security Setup Settings for this user on the Security Setup - Setup Settings screen.



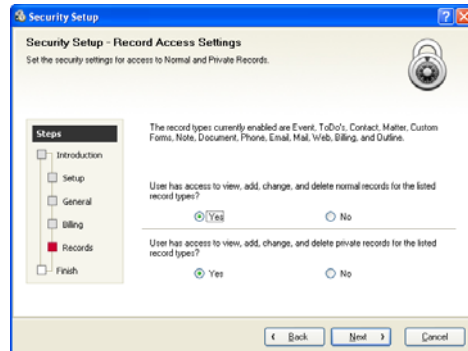
3. Click **Next**. The Security Setup - General Settings screen displays.



4. Select the Security General Settings options for this user. Click **Next** to continue. The Security Setup - Billing Settings screen opens.



5. Select the Security Setup Billing options for this user. Click **Next** to continue. The Security Setup - Record Access Settings screen opens.



6. Select access rights for the record types that this user may access. Click **Next**. The Security Setup - Finish screen displays.
7. Click **Finish**. The Time Matters application opens.



## Setting up Time Matters Mobility

Setting up Time Matters Mobility requires you to do the following:

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1. Ensure that your firm has an active Annual Maintenance Plan (AMP).
  2. Download and install the Mobility Access Manager.
  3. Ensure that **Enable Web Access** is selected on the General tab of Program Level Setup in Time Matters (the option is selected by default).
  4. Ensure the following for each Time Matters user who will use Mobility:
    - The **Mobility User** check box is selected on the User Form. (This check box is also present on the New User wizard when you create new Time Matters user accounts.)
    - An email address is entered on the User Form. This will be entered as the User ID when logging in to the Mobility web site.
    - The user's password meets the strong password requirements described in the Time Matters Help file. (Users without a strong password will be prompted to change their password the first time they attempt to log in to the Mobility web site.)
  5. Provide users with the Mobility URL: <https://tmmobility.lexisnexis.com>
- 

The following section provides instructions on installing the Mobility Access Manager. For additional details on setting up and using Time Matters Mobility, please refer to the Help file.

### Installing the Mobility Access Manager

In order to take advantage of the Time Matters Mobility feature, you must install the Mobility Access Manager. This component is installed separately from the main Time Matters installer.

**Note:** Be sure to install Time Matters 11.0 before you install the Mobility Access Manager.

You can download the Mobility Access Manager installation file (`setup.exe`) on the same Product Entitlement web page where you downloaded the main Time Matters installer. Click the link to download the Mobility installation file. You can run the file immediately after downloading, or save the file and run it manually. If you save the file, note the file name and location.

#### To install the Mobility Access Manager:

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1. Double-click the Mobility Access Manager installation file (`setup.exe`) to open the installation wizard.
2. Wait for the wizard to complete preparations for the installation. When the Welcome screen appears, you are ready to begin the installation.

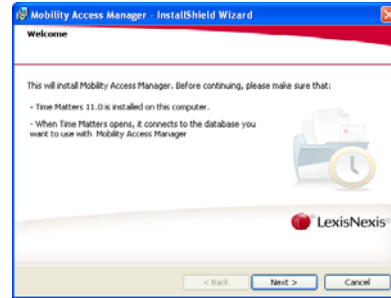
## Install Guide - Time Matters 11.0

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3. Review the checklist on the Welcome screen.

The computer you are currently using should have Time Matters installed. Time Matters should be configured so that when the application opens, it connects to the database you want to use with Mobility.

Click **Next** to continue.

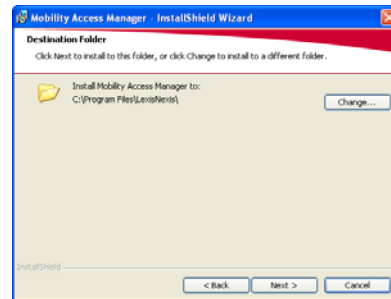


4. Review the license agreement.

Select **I accept the terms in the license agreement** and then click **Next**.

5. To accept the default folder where the Mobility Access Manager will be installed, click **Next**.

If you want to specify a different folder, click **Change** and browse to the desired folder, then click **OK**.

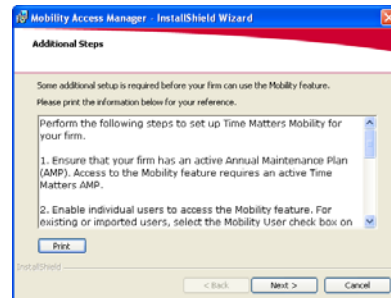


6. Review the installation settings. When you are ready to install, click **Next**.

Wait for the installation to complete.

7. Review the post-installation steps that are required to set up Time Matters Mobility for your firm. Click the **Print** button to print a copy of the instructions for your reference.

Click **Next** to continue.



8. Click **Finish** to close the wizard.
-

# Appendix: Troubleshooting SQL Database Connectivity Issues

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If users are unable to connect to the Time Matters database, you might need to modify Windows Firewall settings so that it does not block SQL Server services.

**Symptom:** When users attempt to connect to the Time Matters database, an error message states that the database cannot be found. The Advanced section of the message window states that the program could not log in to SQL Server using the `1ntmuser` account.

## To modify Windows Firewall settings

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1. Click the Windows **Start** button and then click **Run**. The Run window opens.
  2. Type `firewall.cpl` and press ENTER. The Windows Firewall window opens.
  3. On the **Exceptions** tab, click the **Add Program** button. The Add a Program window opens.
  4. Click the **Browse** button. The Browse window opens.
  5. Browse to the following program and double-click it:  
`C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn\sqlservr.exe`
  6. Click **OK**.
  7. Repeat steps 3-6 to add the following program:  
`C:\Program Files\Microsoft SQL Server\90\Shared\sqlbrowser.exe`
  8. Click **OK** to close the Windows Firewall window.
- 

After modifying the Windows Firewall settings, you should restart the SQL Server services.

## To restart SQL Server services

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1. Click the Windows **Start** button and then click **Run**. The Run window opens.
  2. Type `services.msc` and press ENTER. The Services window opens.
  3. For each of the following services, right-click the service and select **Restart**:
    - SQL Server (this might say SQLEXPRESS if you are using SQL Server Express Edition)
    - SQL Server Browser
- 

**Note:** If modifying Windows Firewall settings does not resolve the issue, you might need to add exceptions to specific ports used by SQL Server. Contact your IT staff for assistance with this.

