Time Matters®
and Billing Matters®
User Guide

Version 13

LexisNexis®

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About this guide

The User Guide provides instructions for performing common, daily tasks in LexisNexis Time Matters® and Billing Matters® Practice Management Software. If you need additional information, please refer to the online Support Center.

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Getting Started

Log in

1. Start Time Matters using one of the following methods:
   - Double-click the Time Matters 13.0 icon on your desktop.
   - On the Windows Start menu, click **All Programs**, then click **LexisNexis**, and then click **Time Matters 13.0**.

   The Welcome screen opens.

   Note

   If Time Matters opens without displaying the Welcome screen, the login information of the previous user was saved.

2. Enter your Time Matters user ID and password.
3. Optionally, click the **Options** button to show additional options on the Welcome screen.

Screen element	Description
Staff	Select the Staff you want to use in this session. The selected Staff's records will appear by default on the Calendar and "My [record type]" lists. If a default Staff is assigned to your user ID, you do not need to select a Staff here unless you want to change the Staff whose records appear by default on the Calendar.
Date	The current date. By default, this date is entered on new records and displayed on the Calendar. Normally, there is no reason to specify a different date than the current date.
Save This Login	Saves your user ID and password and uses them automatically the next time you start Time Matters. If a different user needs to log in, click the **File** menu and then click **Re-Login** to display the login window. Time Matters for Microsoft Outlook will use your saved login by default. This check box is automatically cleared if the **Require Program Login Screen** option is selected in Workstation Level Setup.
Show Reminders	Opens the Alerts and Reminders window after you log in.

4. Click **OK**.

Start the application in Training Mode

Training Mode provides sample data that you can use to practice using Time Matters features. This data is separate from your working database, so you can make any changes you like without affecting real data.

Warning

It is advisable not to enter real data while in Training Mode, unless you have also changed the default user ID and password and set up security features to prevent unauthorized users from using Training Mode to view real data.

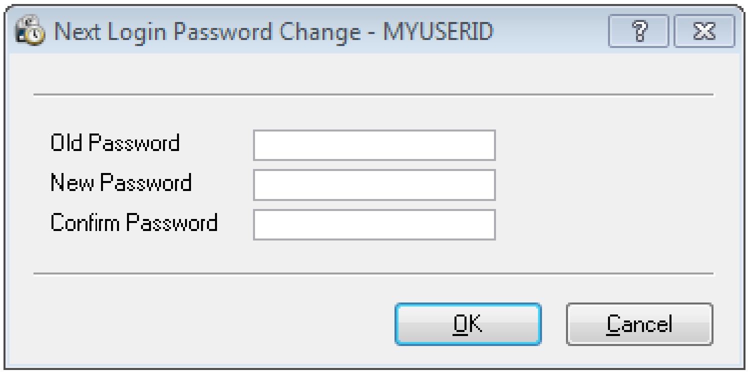
1. Start Time Matters using one of the following methods:
   - Double-click the Training Mode - Time Matters 13.0 icon on your desktop.
   - On the Windows **Star**t menu, click **All Programs**, then click **LexisNexis**, and then click **Training Mode - Time Matters 13.0**.
2. On the Welcome screen, enter `TM` as the user ID and `TM` as the password.
3. Click **OK**.

Change your password

Security settings might require you to change your password the next time you log in, by a particular date, or on a recurring basis.

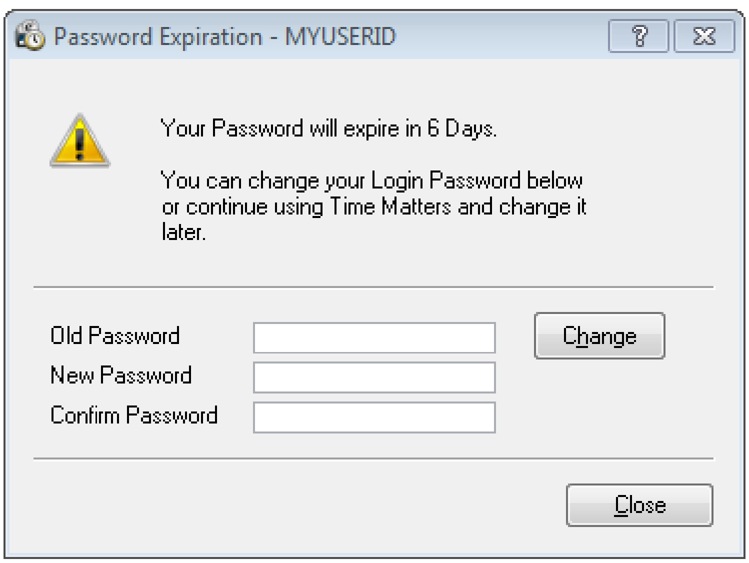
If you need to change your password, a window will open to ask for the new password.

1. Enter your old password and new password in the corresponding boxes. Type your new password a second time in the **Confirm Password** box.
2. On the Next Login Password Change window, click **OK**.



-or-

On the Password Expiration window, click **Change**.



Change your password when not required

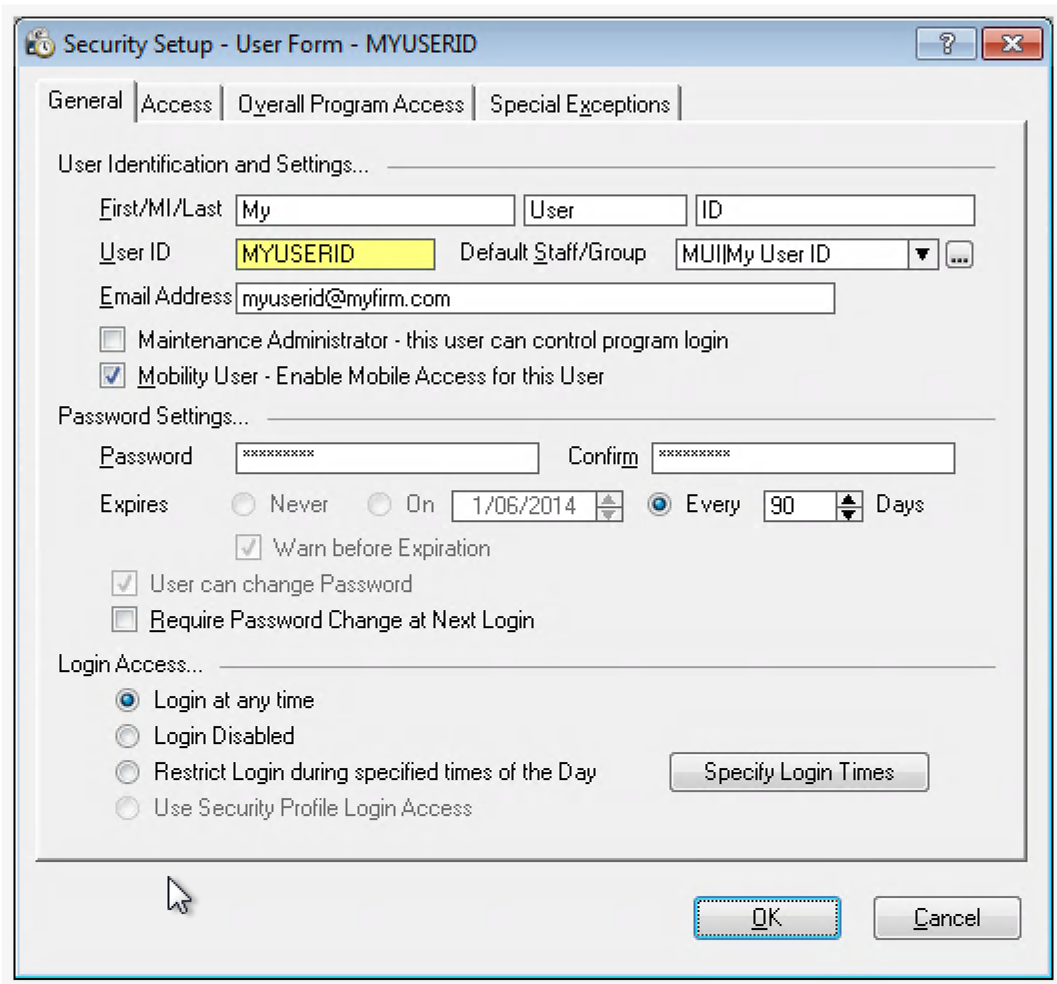
If security settings allow you access to the User Form, you can change your password at any time.

1. Select **File** > **Setup** > **User and Security** > **Users**.

   The Security Setup - List of Users window opens.

2. Double-click your **user ID** on the Security Setup - List of Users window that opens.

   The Security Setup - User Form window opens.



3. In the **Password** box, type your new password.
4. In the **Confirm** box re-type your new password.
5. Click **OK**.

Use the Navigator to open program features

Use the Navigator window to access many application features from one location.

Each tab along the left side of the window provides buttons for a collection of related tasks.

Do one of the following to display the Navigator window:

- On the **View** menu, click **Navigator**
- Press CTRL+N

View a list of records

Each record type (such as Contacts, Matters, and Documents) has a main record list. The list is often the most convenient place to locate specific records and view summary information about them.

Although most types of record lists can be accessed from the Database menu, others are accessed from other menus.

To view a list of...

- **Contacts**: Click the **Database** menu, point to **Contact List**, and click **All Contacts**.
- **Matters**: Click the **Database** menu, point to **Matter List**, and click **All Matters**.
- **Events**: Click the **Calendar** menu, point to **Event List**, and click **All Events**.
- **ToDo's**: Click the **Calendar** menu, point to **ToDo List**, and click **All ToDo's**.
- **Documents**: Click the **Database** menu, point to **Document List**, and click **All Documents**.
- **Notes**: Click the **Database** menu, point to **Note List**, and click **All Notes**.
- **Email**: Click the **Mail** menu, point to **Email List**, and click **All Email**.
- **Mail**: Click the **Mail** menu, point to **Mail List**, and click **All Mail**.
- **Phone Calls**: Click the **Database** menu, point to **Phone Call List**, and click **All Phone Calls**.
- **Billing Items**: Click the **Billing** menu, point to **Billing Item List**, and click **All Billing Items**.
- **Custom Forms**: Click the **Database** menu, point to **Custom Form List**, and click **All Custom Forms**.
- **Lexis Research Records**: Click the **Database** menu, point to **Lexis Research**, and click **All Lexis Research**.
- **Outlines**: Click the **Database** menu, point to **Outline List**, and click **All Outlines**.
- **User Defined Records**: Click the **Database** menu, point to **<user defined name> List**, and click **All <user defined name>Types**.

Locate a record on a list

Time Matters provides several ways to locate a specific entry on a record list. Two simple methods are using QuickPik and the Search box on the list toolbar.

To use QuickPik:

1. Click the header of the column you want to search on.
2. Type the first few characters of the word or number you want to find.

   The record that most closely matches what you are typing will be highlighted in the list.

To use the Search box:

1. Click inside the Search box on the list toolbar.
2. Type a word, name, or number associated with the record you want to find.
3. Press ENTER.

   The list will be filtered to display only records that match the text you typed.

Open a record for viewing or editing

1. Open the list of the record type you want to view.
2. Double-click the record you want to view or edit.

   The record form opens.
3. Click the tab corresponding to the type of information you want to view or edit.

New features

Client Portal online document sharing

A new, integrated client portal, powered by technology from WatchDox™, lets you share your Time Matters documents online with clients, experts, and other third parties. This file-sharing portal helps you control and protect your shared files by allowing you to:

- Define who can access the file—only the contact(s) associated with the matter, anyone with the same email domain as the contact(s) or everyone
- Determine what they can do with the document—view, print or download
- Prevent screen captures of the file by displaying only small areas at a time
- Identify the timeframe that they can access the document
- Track the file's whereabouts at all times and maintain an audit trail for compliance purposes
- Revoke access to files anytime

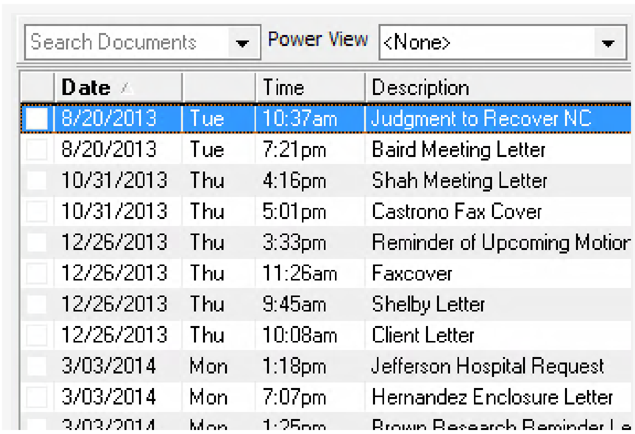
Contacts are notified of shared files by email and can view the files from any Internet-connected computer, smartphone, or tablet. Please see the "Document sharing" section of this guide, and your Time Matters Help or Online Help for more details on sharing files with your clients.

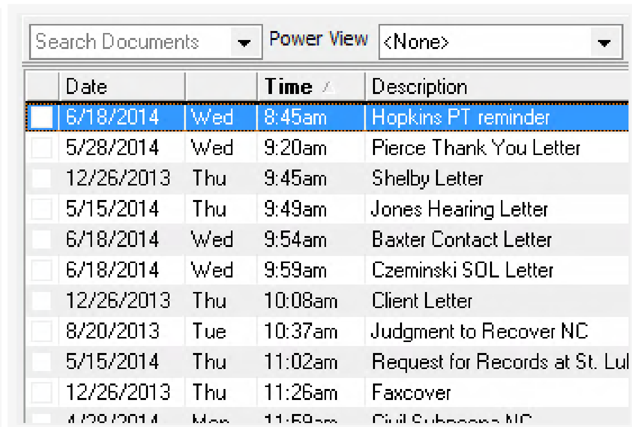
Automatic data backup

Time Matters 13 lets you schedule and automate backups of your Time Matters database and Time Matters shared file directory to help protect you from the unexpected. You can specify a time of day for the backup that's convenient for firm members, and the backup frequency. You can also perform a manual backup at any time. For more information on automating backups please see "Backup Time Matters Data" in the Administration Guide or in this Time Matters Help or Online Help.

Sort records by column headers

A new sort feature has been added to the Contact Timeline, Matter Timeline, and the Attachments List that allows you to sort records by the column headers, in ascending or descending order. By using this sort feature, the information you are looking for can be more readily accessible. Below are example sorts from the Attachments List. The first is an example of the records sorted by Date, the second is an example of those same records sorted by Time.





To sort the records, simply click on the column header of the column you wish to sort by. You can toggle between ascending and descending order by clicking on the header again.

Color-code matters in the calendar

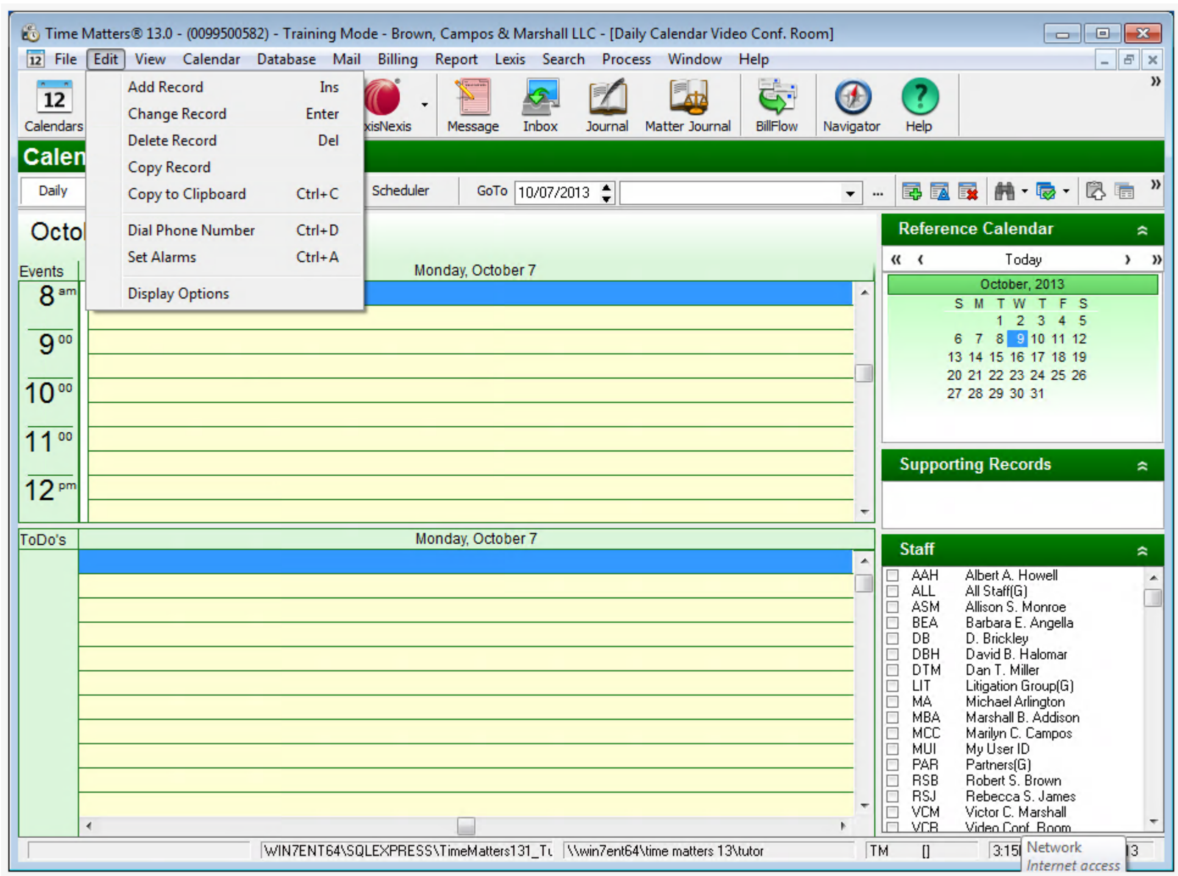
There is a new feature in the calendar that lets you color code matters to easily identify related tasks and events, as well as visually remind you about the billable time you’ve worked throughout the day.

Before you can select colors for matters, you need to change the “Header Color” in the Calendar Display Options window. When that is done, then you can open each matter you want to color code, and select the color for that matter. Once a color is selected the color is displayed on all events and todo's associated with that matter. The color is also applied to all staff members who are selected to show on the calendar.

Set the Header Color option for matters

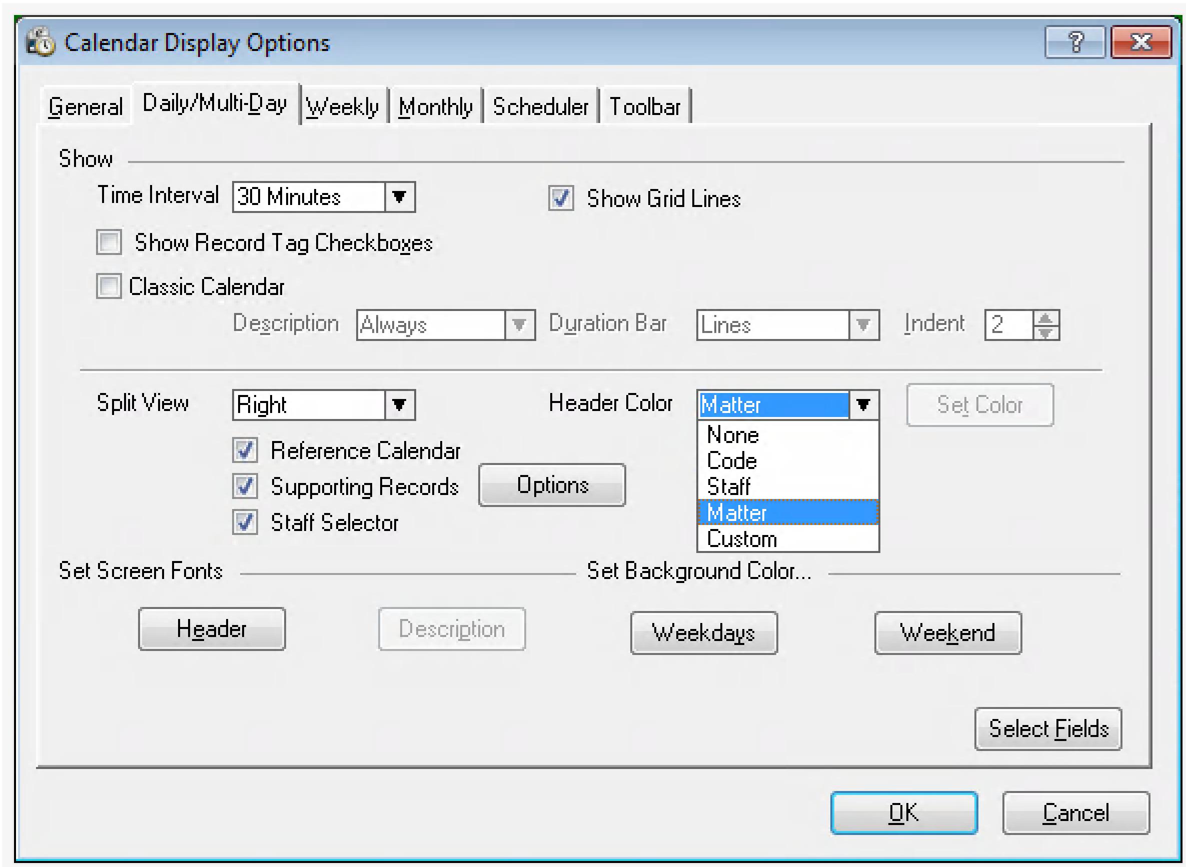
To set the header color option for matters:

1. Click the **Calendars** button on the toolbar, to open the Calendar window.



2. Select **Edit** > **Display Options** from the menu bar.

   The Calendar Display Options window opens.



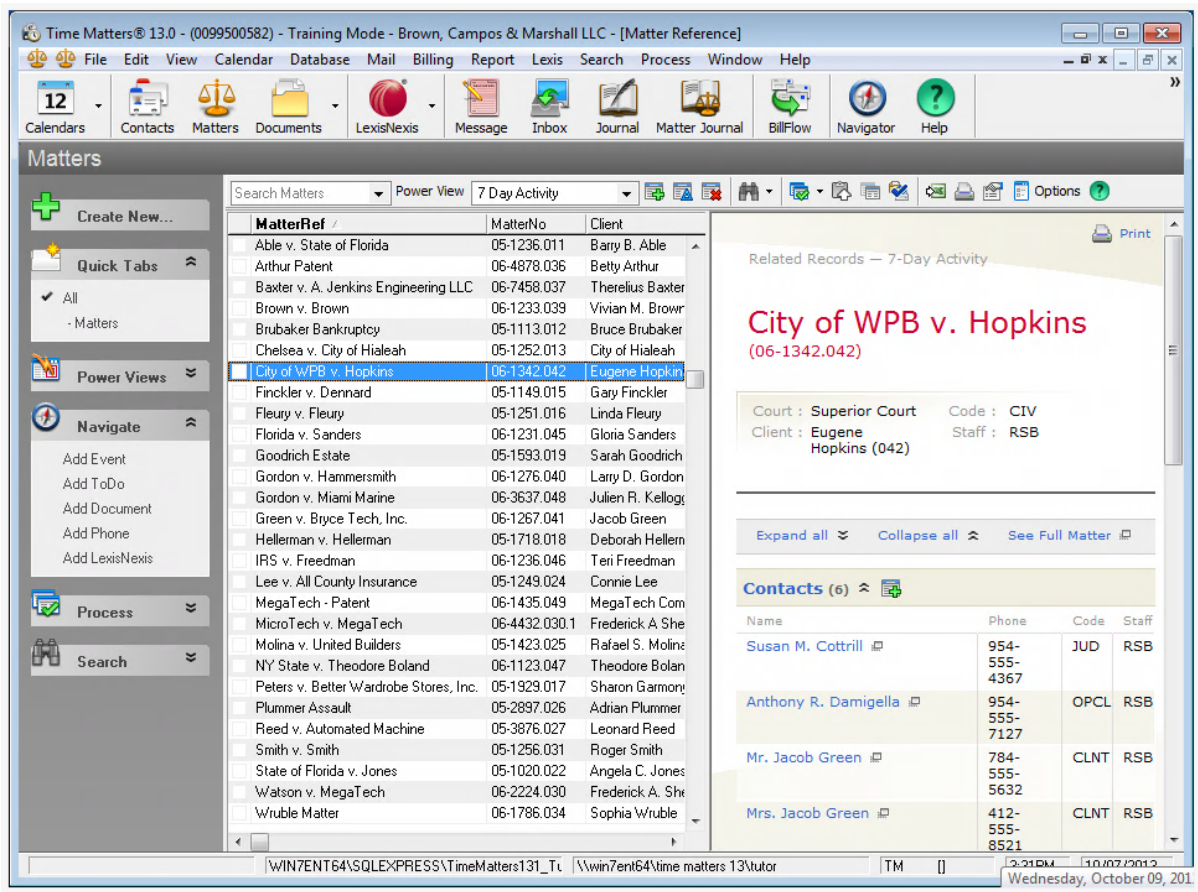
3. Click the **Daily/Multi-Day** tab, if not already selected.
4. Click the **Header Color** arrow, and select **Matter**.
5. Click **OK**.

You are now ready to color code as many matters as you want.

Color code a matter

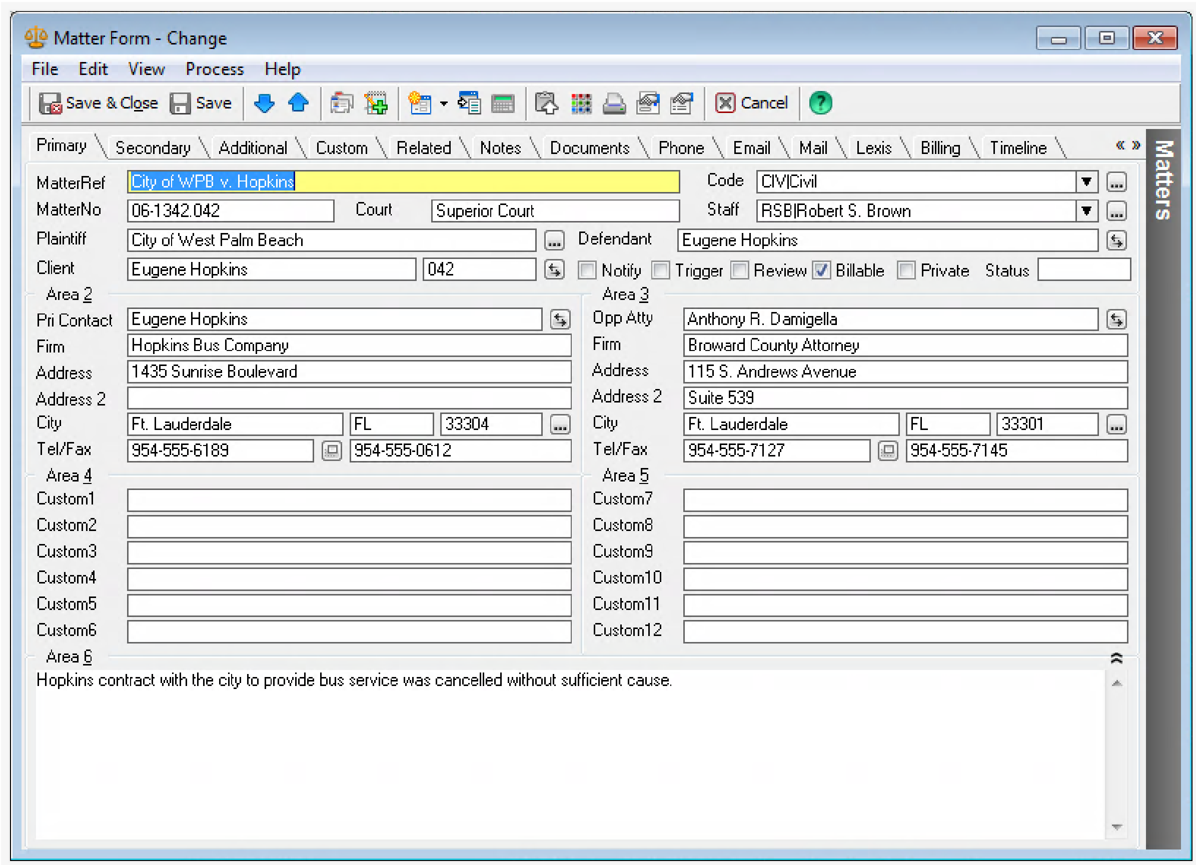
To color code a matter:

1. Click the **Matters** button on the toolbar, to open the Matters window.



2. Double-click on the matter you want to color code.

   The Matter Form – Change window opens.



3. Click the **Select Color** button on the toolbar to display the Select Matter Color pallet.
4. Click on the color you want to use, or create a custom color using the **Define Custom Colors>>** button.
5. Click **OK** to select the color and close the Select Matter Color pallet.

   You are returned to the Matter Form – Change window.
6. Click the **Save & Close** button on the toolbar to close the matter.

   Now, all events and todo's that are associated with the matter (via the regarding line) display the same color. The color is also applied to all staff members who are selected to show on the calendar.
7. Repeat **steps 2 through 6** for each matter you want to color code.

Clients and Matters

View a Contact

1. Do one of the following to open the Contact list:
   - Click the Contacts button on the main toolbar.
   - Click the **Database** menu, point to **Contact List**, and then click **All Contacts**.
   - Press F5.
2. Highlight the Contact you want to view.

   Summary information about the Contact appears in the Power View area of the list.
3. To open the full Contact record, double-click the Contact in the list.

Add a Contact

You can add a Contact using the New Contact Intake wizard or using the Contact form.

Add a Contact using the New Contact Intake wizard

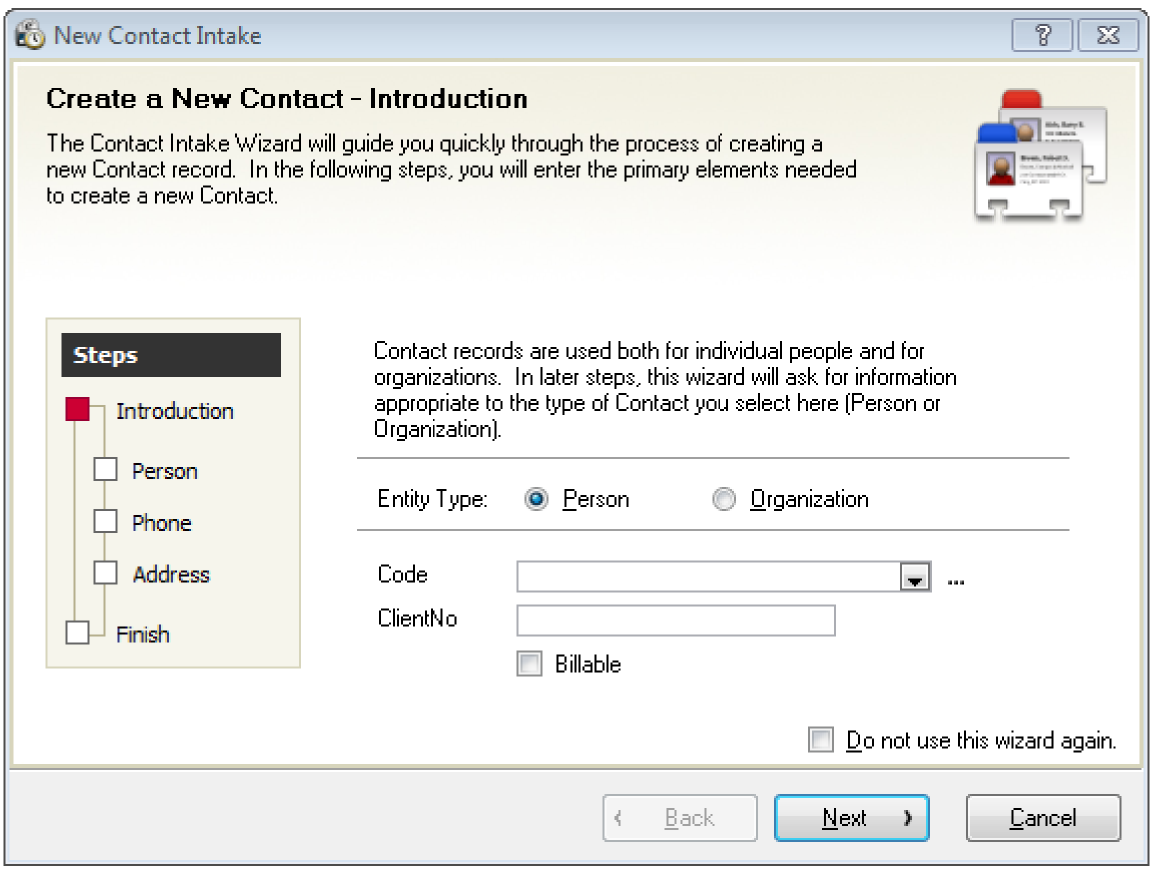
1. Do one of the following:

   - Press Ctrl+Shift+C.
   - On the **File** menu, point to **New Record** and click **Contact**.
   - On the Contacts list, click the **Add** button.

   The New Contact Intake Wizard opens.

   Note

   If the wizard is disabled, the Contact form will open instead.



2. Select **Person** if the Contact is an individual person, or select **Organization** if the Contact is a group, organization, business, etc.

   This selection determines which options appear on the second page of the wizard.

3. In the **Code** box, click the arrow and select the classification code that best describes what kind of Contact you are creating.
4. On each page of the wizard, enter the information you have about the Contact and click **Next**.

   Tip

   You can jump to a specific page of the wizard by clicking the name of the page in the "outline" navigation on the left side.

5. On the last page of the wizard, click **Finish**.

Add a Contact using the Contact form

1. If the New Contact Intake wizard is enabled, disable it:
   a. On the **File** menu, point to **Setup**, then point to **General**, and then click **User Level**.
   b. On the General tab of the User Level Setup window, clear the **Contact** check box in the Wizard Defaults area.
   c. Click **OK**.
2. Do one of the following:
   - Press Ctrl+Shift+C.
   - On the **File** menu, point to **New Record** and click **Contact**.
   - On the Contacts list, click the **Add** button.

   The Contact form opens.
3. If the Contact is an organization rather than an individual, click the **Full Name** button. The label changes to **Org Name**.
4. Enter the Contact's name in the **Full Name**/**Org Name** box.
5. In the **Code** box, click the arrow and select the classification code that best describes what kind of Contact you are creating.
6. If the Contact is a client, enter the number in the **ClientNo** box.
7. In the remaining areas of the Primary, Secondary, and Additional tabs, enter other information about the Contact.
8. Click the **Save & Close** button.

Add a Contact related to a specific Matter

1. Open the Matter list.
2. Select a Matter for which you want to add Contacts.

   Do one of the following:

   - Press Ctrl+Shift+C.
   - On the **File** menu, point to **New Record** and click **Contact**.
   - Click the **Create New** button in the Task Panel on the left side of the Matter list. On the Add New Related Record window, select **Contact** and click **OK**.

   The selected Matter is related to the Contact automatically, and appears in the **MatterRef** and **MatterNo** boxes.
3. Complete the rest of the New Contact Intake wizard, or complete the Contact form and click **Save & Close**.

View a Matter

1. Do one of the following to open the Matter list:
   - Click the Matters button on the main toolbar.
   - Click the **Database** menu, point to **Matter List**, and then click **All Matters**.
   - Press F6.
2. Highlight the Matter you want to view.

   Summary information about the Matter appears in the Power View area of the list.
3. To open the full Matter record, double-click the Matter in the list.

Add a Matter

You can add a Matter using the New Matter Intake wizard or using the Matter form.

Add a Matter using the New Matter Intake wizard

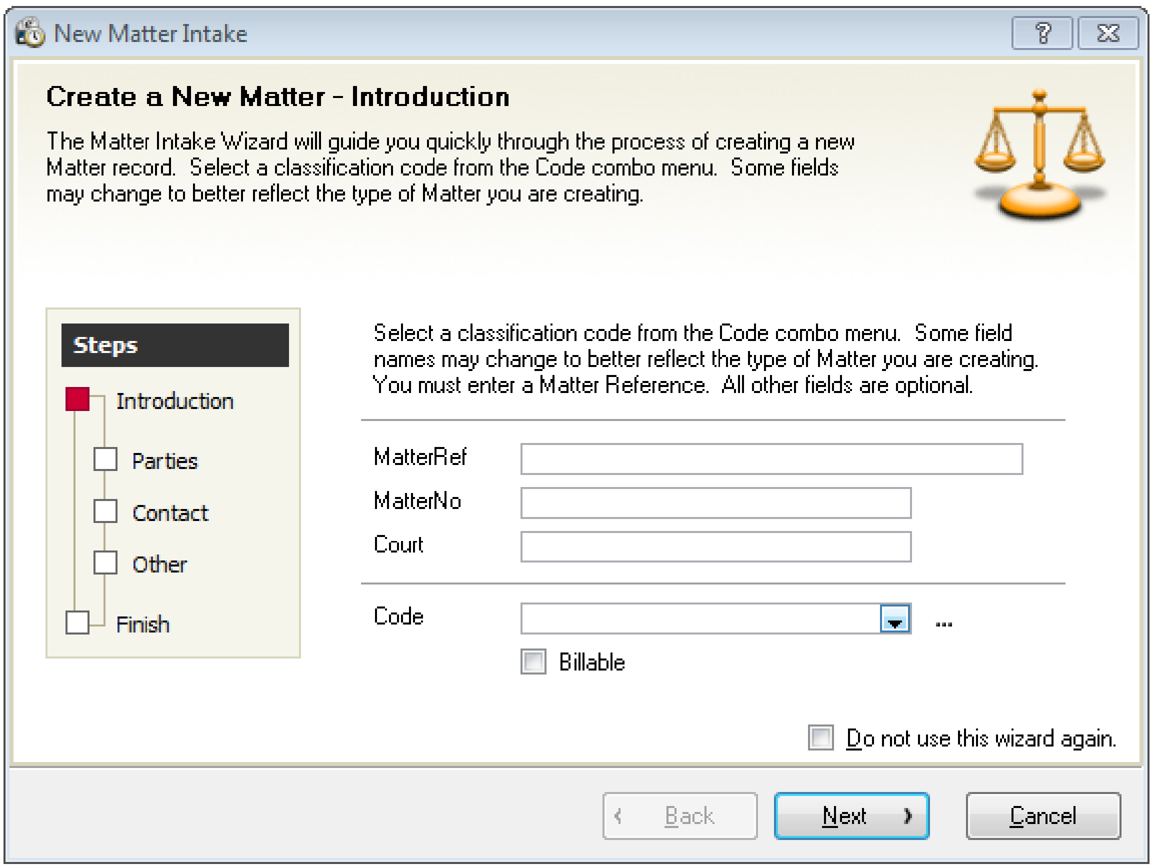
1. Do one of the following:

   - Press Ctrl+Shift+A.
   - On the **File** menu, point to **New Record** and click **Matter**.
   - On the Matter list, click the **Add** button.

   The New Matter Intake Wizard opens.

   Note

   If the wizard is disabled, the Matter form will open instead.



2. Select **Person** if the Contact is an individual person, or select **Organization** if the Contact is a group, organization, business, etc.

   This selection determines which options appear on the second page of the wizard.

3. In the **MatterRef** box, type a name for the Matter.

4. In the **MatterNo** box, type a number for the Matter.
5. In the **Code** box, click the arrow and select the classification code that best describes what kind of Matter you are creating.
6. On each page of the wizard, enter the information you have about the Matter and click **Next**.

   Tip

   You can jump to a specific page of the wizard by clicking the name of the page in the "outline" navigation on the left side.
7. On the last page of the wizard, click **Finish**.

Add a Matter using the Matter form

1. If the New Matter Intake wizard is enabled, disable it:
   a. On the **File** menu, point to **Setup**, then point to **General**, and then click **User Level**.
   b. On the General tab of the User Level Setup window, clear the **Matter** check box in the Wizard Defaults area.
   c. Click **OK**.
2. Do one of the following:
   - Press Ctrl+Shift+A.
   - On the **File** menu, point to **New Record** and click **Contact**.
   - On the Matter list, click the **Add** button.

   The Matter form opens.
3. In the **MatterRef** box, type a name for the Matter.
4. In the **MatterNo** box, type a number for the Matter.
5. In the **Code** box, click the arrow and select the classification code that best describes what kind of Matter you are creating.
6. In the remaining areas of the Primary, Secondary, and Additional tabs, enter other information about the Matter.
7. Click the **Save & Close** button.

Associate a Contact with a Matter

When two records are associated with each other, they are referred to as *related records*.

You can relate a Contact to a Matter by opening the Contact record and entering the name of the Matter in the **MatterRef** box, or the Matter number in the **MatterNo** box.

You can relate a Matter to a Contact by opening the Matter record and entering the Contact in any box that accepts a Contact. (If the Contact you are relating is the client for whom the Matter was created, enter that Contact in the **Client** box.)

Other kinds of records can also be related to each other. The most common way to relate records is to assign them to the same Client and/or Matter. On the record form, enter the Client and/or Matter in one of the boxes on the **Regarding** line. (When you click a Regarding line box, the label "Regarding" changes to indicate the box you have selected: either MatterRef, MatterNo, Client, or ClientNo.)

Calendar

View the calendar

In Time Matters, the calendar is shared among all Staff. You can filter the calendar to show only items assigned to you, or you can view items assigned to other Staff (if security settings give you rights to view those items).

There are three calendar views: daily, weekly, and monthly. The daily view has additional options to show multiple days at a time.

1. Do one of the following to open the calendar:
   - Click the Daily, Weekly, or Monthly button on the main toolbar.
   - Click the Calendar menu and then click the calendar view you want to open: **Daily Calendar**, **Weekly Calendar**, or **Monthly Calendar**.
2. To view a date other than the current day, do one of the following:
   - Enter the date in the GoTo box on the calendar toolbar.
   - Click the date on the Reference Calendar.
3. To view records for a Staff other than yourself, do one of the following:
   - Click the arrow beside the Staff box and select the Staff you want to view.
   - Click the lookup button beside the Staff box and select multiple Staff to view.
   - In the Staff selector area, select the check box beside each Staff you want to view.

Events and ToDo's

Events and ToDo's are similar, but have important differences:

An Event has both a date and a time. Event records are like appointments. They typically represent meetings, hearings, trials, and otehr events that occur at a particular time of day.

A ToDo has a date but no time. ToDo records are like tasks. They must be completed on or by a date, but not necessarily by a particular time on that date (although it is typical for the task to be due by the end of the day). Such tasks might include writing a letter, doing research, or filing documents.

On the daily calendar, Events and ToDo's appear in different areas of the window.

Add an Event to the calendar

1. Do one of the following:
   - Press Ctrl+Shift+V.
   - On the **File** menu, point to **New Record** and click **Event**.
   - On the Daily or Multi-day Calendar, double-click a time in the Events area.
   - On the Weekly or Monthly Calendar, right-click a date and select **Add Record** on the context menu. On the Add New Record window, select **Event Record** and click **OK**.
   - On the Events list, click the **Add** button.

   The Event form opens.
2. Complete the **Date** and **Time** boxes, which are required.
3. In the **Code** box, click the arrow and select the classification code that best describes what kind of Event you are creating.
4. On the **Regarding** line, enter the Contact and/or Matter related to the Event.
5. In the other areas of the Primary tab, enter other information about the Event.
6. Click the **Save & Close** button.

Use Quick Entry to add an event

1. On the Daily or Multi-day Calendar, click a time slot.
2. Begin typing a description of the event.

   The Quick Entry window opens, displaying the description you are typing.
3. In the **Code** box, click the arrow and select the classification code that best describes what kind of Event you are creating.
4. Optionally, enter additional information in the **Memo** area.
5. Click **OK**.

   The event appears on the Calendar (and on the Event record list). You can double-click it to open the full Event form and add more information.

Add a ToDo

1. Do one of the following:
   - Press Ctrl+Shift+T.
   - On the **File** menu, point to **New Record** and click **ToDo**.
   - On the Daily or Multi-day Calendar, double-click any part of the ToDo's area.
   - On the Weekly or Monthly Calendar, right-click a date and select **Add Record** on the context menu. On the Add New Record window, select **ToDo Record** and click **OK**.
   - On the ToDo's list, click the **Add** button.

   The ToDo form opens.
2. Complete the **Date** box, which is required.
3. In the **Code** box, click the arrow and select the classification code that best describes what kind of ToDo you are creating.
4. On the **Regarding** line, enter the Contact and/or Matter related to the ToDo.
5. In the other areas of the Primary tab, enter other information about the ToDo.
6. Click the **Save & Close** button.

Mark a ToDo as "done"

When you complete a ToDo, you should mark it as done. This causes the ToDo not to appear on the Alerts and Reminders window, and on the calendar the ToDo appears with a strike-through.

Do one of the following to mark a ToDo as done:

- On the calendar, right-click the ToDo and select **Mark as Done** on the context menu.
- Open the ToDo record and select the **Done** check box. Save and close the record form.

Documents

Document records

When you add a file or document to Time Matters, a Document record is created. The Document record stores information about the file, including:

- The location of the file
- The Contact and/or Matter related to the file
- The Staff(s) assigned to the document
- A history of document versions

Note

A Document record is **not** the same thing as the file or document it refers to. The Document record is a set of information about the file or document. You can delete or change the Document record without affecting the document itself.

Create a document by merging Time Matters record information

Create a merge template

Before you begin, you will need a merge template for the kind of document you want to create.

To view a list of merge templates:

1. In Time Matters, select **File** > **Setup** > **Templates** > **Merge**.
2. The List of Merge Templates window opens.
3. In the **Record Type** box, select the type of record whose information you want to merge into a document.

   The window displays your existing merge templates for the selected record type.

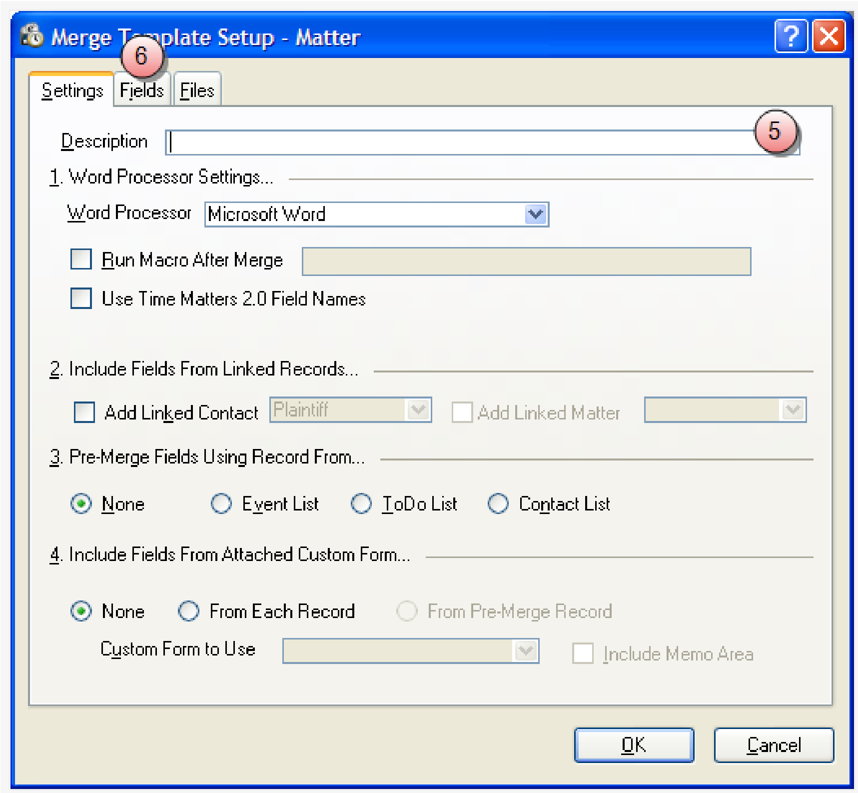
If the kind of merge template you want does not appear, you will need to create a new template.

To create a merge template:

1. In Time Matters, go to **File** > **Setup** > **Templates** > **Merge**.

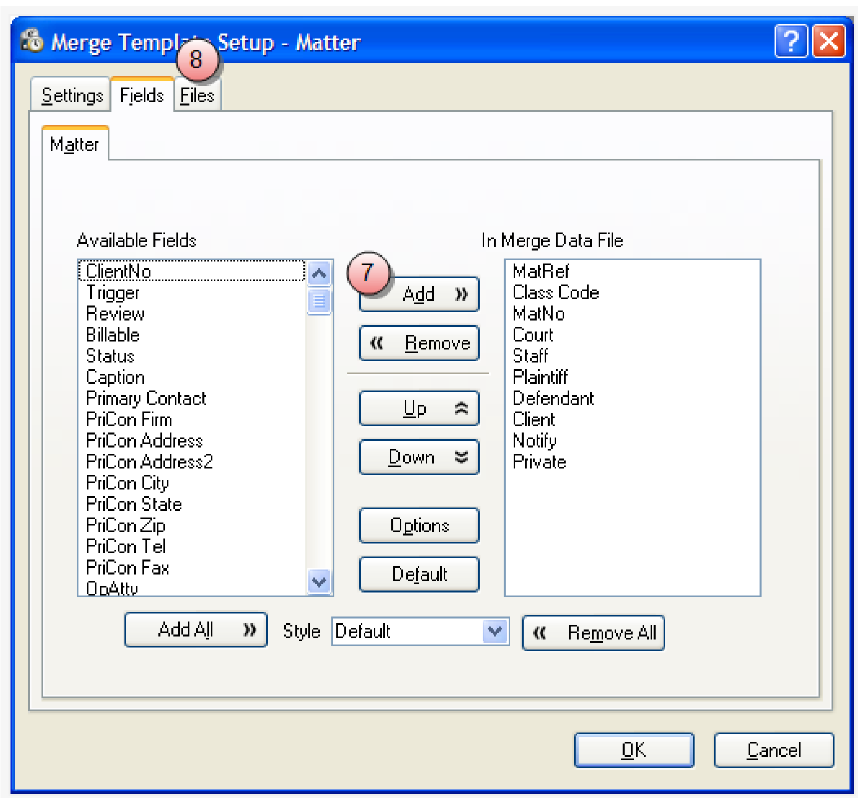
   The List of Merge Templates window opens.
2. In the **Record Type** box, select the type of record whose information you want to merge into a document.
3. Click the **Add** button.
4. Select **Program Level** if you want the new template to be available to all Time Matters users, or select **User Level** if you want the template to be available only to you. Click **OK**.

   The Merge Template Setup window opens.

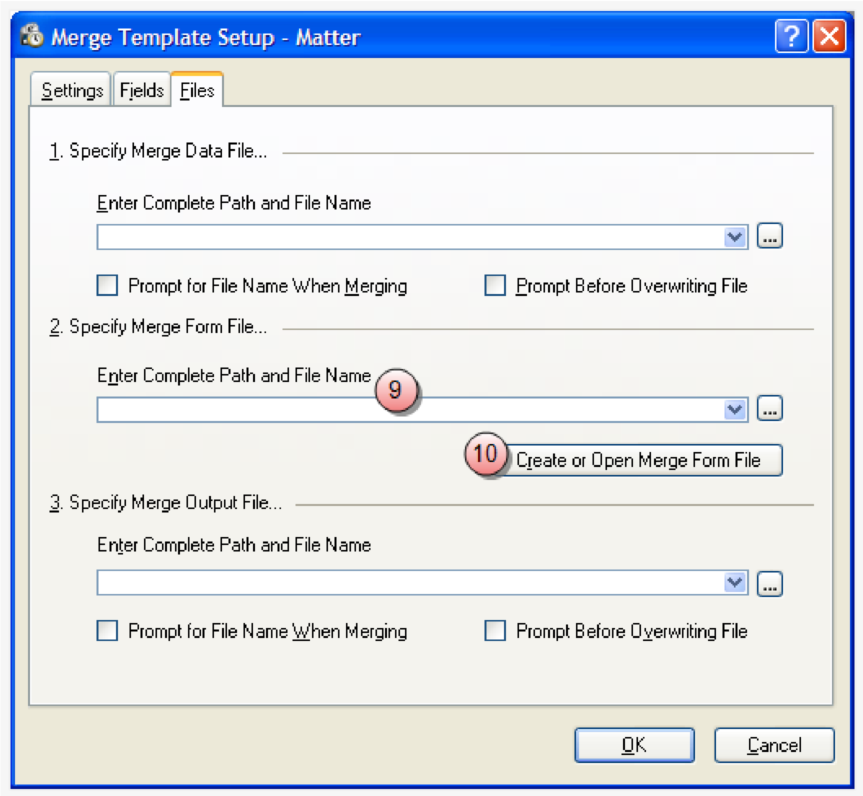


5. On the Settings tab, type a description of the template in the **Description** box.

6. Click the Fields tab.



7. Select each record field you want to make available in the merge and click **Add** to move it to the **In Merge Data File** list.
8. Click the Files tab.



9. In the **Enter Complete Path and File Name** box, type the directory path and file name you want to use for the new template.
10. Click the **Create or Open Merge Form Field** button.

    Your word processing application opens.
11. Type the form letter (or other merge document) as you want it to appear.
12. Click the **Insert Merge Fields** icon on the word processor toolbar.

    The Insert Field Name or Number window opens.
13. Select a field and click **Insert** to place it in the document at the cursor location. Repeat this for each field you want to include in the document.
14. Click **Close** to close the Insert Field Name or Number window.
15. Click **Save** and close or minimize your word processor.
16. On the Merge Template Setup window, enter the path and file name in the **Specify Merge Output File** box.
17. Select the **Prompt for File Name When Merging** check box.
18. Click **OK** to close the Merge Template Setup window.

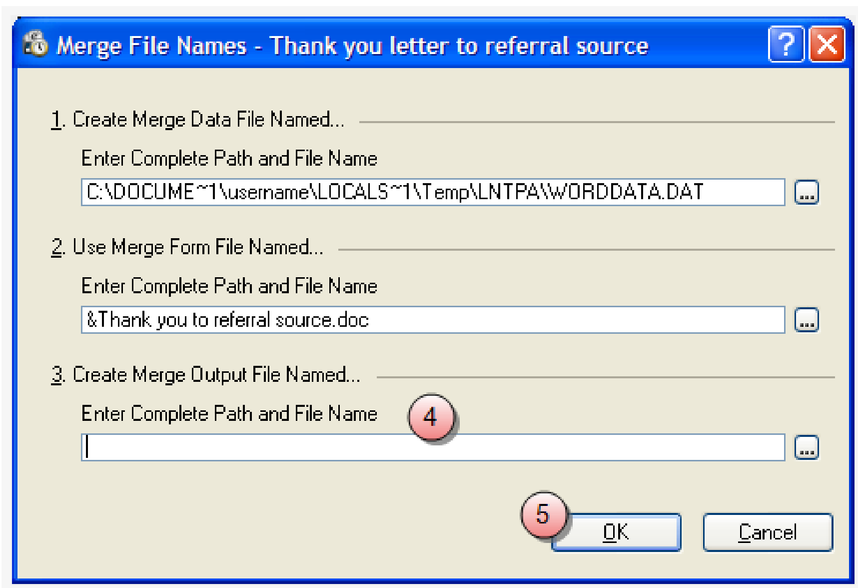
Merge Time Matters information into a document

To merge information from Time Matters into a document:

1. In Time Matters, tag the record(s) whose information you want to merge by clicking the check box beside the record(s) in a list.
2. On the main menu bar, click **Process** and then click **Merge Records**.

   The Select Merge Template window opens.
3. Double-click the merge template you want to use.

   The Merge File Names window opens.

4. Type the name and location of the output file in the **Create Merge Output File Named** area.
5. Click **OK**.

Add an existing document to Time Matters

There are several ways you can import an existing document or file into Time Matters, creating a Document record for that file.

To add a single document, these methods are recommended:

- Time Matters Save (TM Save): save the document to Time Matters while it is open in your word processor or viewer.
- Drag and drop: drag a file from Windows Explorer onto the Time Matters window.
- Send to Time Matters: right-click a file in Windows Explorer and select **Send To > Time Matters**.
- Add a Document record: open a blank Document record and browse to the file you want to attach.

To add multiple documents, these methods are recommended:

- Drag and drop: select multiple files in Windows Explorer and drag them onto the Time Matters window.
- Send to Time Matters: select multiple files in Windows Explorer, right-click them, and select **Send To > Time Matters**.
- Document Search: after completing a Document Search, tag the results, and click **Process > Create Document Profile Records**.

Save a document to Time Matters from your word processor

The Time Matters Save (or TM Save) button appears on the toolbar or ribbon of supported third-party applications, including Microsoft Word, Excel, PowerPoint, and Internet Explorer, Corel WordPerfect, Mozilla Firefox, and Adobe Acrobat and Reader.

If the button does not appear on your application's toolbar, do the following:

1. In Time Matters, click **File**, then click **Setup**, then click **General**, and then click **Workstation Level**.
2. Click the **Word Processor Setup** button or the **Additional Program Setup** button, depending on the type of third-party application you want to use.
3. Select the check box beside the application version for which you want to install the TM Save button.
4. Click **OK**.
5. Click **OK** to close the Workstation Level Setup window.

Save a document to Time Matters

1. In the supported third-party application, click the **TM Save** or **Time Matters Save** button on the toolbar or ribbon.
2. If you are not already logged in to Time Matters, the login window opens. Enter your ID and password.

   The Time Matters Document form opens.
3. Enter information about the document on the form. It is recommended that you enter a Matter and/or Contact on the **Regarding** line, and complete the following additional boxes: **Code**, **Description**, and **Staff**.
4. Click the **Save & Close** button.

Drag and drop documents into Time Matters

You can create Document records by dragging one or more files from Windows Explorer onto the Time Matters window.

1. Open Windows Explorer and Time Matters, and tile the windows so that both programs are visible.
2. Select one or more files in Windows Explorer and drag them onto the Time Matters window.
3. The results depend on where you drop the files:
   - If you drop a single file onto the Document list in Time Matters, a Document form opens. Complete and save the form.
   - If you drop multiple files onto the Document list, the Create Document Profile Records window opens. Enter information that is common to all the documents and click **OK**. If you selected the option to preview each Document record, the records will open one at a time, and you must click **Save & Close** each time (after adding any additional information needed).
   - If you drop files onto a Contact, Matter, Event, or ToDo, the Document records you create are automatically related to the target record. Some information on the Document form will be pre-filled with information from the target record.

Send files to Time Matters from Windows Explorer

You can create Document records by selecting one or more files in Windows Explorer and using an option on the context menu.

1. In Windows Explorer, select one or more files. Right-click the selection and select **Send to** > **Time Matters** on the context menu.

   The Create Document Profile Records window opens.

2. Enter information for the document(s) and click **OK**.
3. If you selected the option to preview each Document record, the records will open one at a time, and you must click **Save & Close** each time (after adding any additional information needed).

Import a document using the Document form

You can bring an existing file or document into Time Matters using the Document form.

1. On the Document record list, click the **Add** button.
2. In the **File Name** box, specify the name and location of an existing file.
3. Enter additional information about the file. It is recommended that you enter a Matter and/or Contact on the **Regarding** line, and complete the following additional boxes: **Code**, **Description**, and **Staff**.
4. Click the **Save & Close** button.

Create a document using information copied from a record

The Formattable Clipboard lets you copy information from multiple record fields and then paste the information into a document in a preconfigured format.

For example, instead of individually copying and pasting each address field on a Contact form, you can define a Formattable Clipboard template that copies all the address fields and pastes them in a correctly formatted block. You can even create a form letter and automatically insert selected information from a Contact.

Create a new document using the Formattable Clipboard

1. On the Document record list, click the **Add** button.

   The Document form opens.

2. Enter information about the record on the form, It is recommended that you enter a Matter and/or Contact on the **Regarding** line, and complete the following additional boxes: **Code**, **Description**, and **Staff**.
3. In Area 4 of the form, click the **Generate** button and the **Clipboard** button.
4. Select a record from which to copy data to the clipboard:
   a. Click the **Data Source** button.
   b. In the **Select Record Type** box, click the arrow and select the type of record.
   c. Click the **Add** button to open a list of records.
   d. Select the record whose information you want to copy.
   e. Click **OK**.
5. Select a clipboard template to use. This defines how the copied information will be formatted when it is pasted into the document:
   a. Click the **Template** button.
   b. In the left pane, select the application you want to open to create the document.
   c. In the right pane, select the clipboard format you want to use.
6. Click the **Create** button.

   The application associated with your selected template opens.

7. Paste the information in the clipboard by pressing CTRL+V or by clicking the **Paste** button on the toolbar or ribbon.
8. Save the document when you are finished.

Create a new version of an existing document

A single Document record can be associated with multiple versions of a document.

1. Open a Document record.
2. In area 4 of the Document form, click the **Generate** button and the **Existing** button.
3. Click the **New Version** button.

   The current version of the document opens in the program associated with the document's file type.
4. Make the desired changes to the document, then save it.
5. In Time Matters, save and close the Document form.

   The next time the record is opened, Area 4 of the form will show your updated version of the document as the current version. To view a list of previous versions, click the **Versions** button.

Document sharing overview

Secure document sharing is a feature new in Time Matters 13. The feature provides access to an online portal to which you and your clients can upload and retrieve documents.

Document sharing is performed on the Documents tab of the Matter form. From the list of files related to the Matter, you select the ones you want to share and the clients (or other recipients) to whom you want to provide access. Clients are notified by email when documents are shared with them, and can log in to the secure portal, view shared documents, and upload documents of their own to share with users at your firm.

You can set user permissions for each document you share, including permission to view, print, or edit the file. Using the administrative tools on the portal, you can also change or revoke user access to documents at any time.

For more information on document sharing, view the related topic links below.

Note

Your firm must have an active Annual Maintenance Plan (AMP) to enable the Document Sharing feature.

Document sharing general questions

What are the online file-sharing capabilities in Time Matters 13?

Time Matters 13 includes an integrated online document-sharing service powered by secure file-sharing technology from WatchDox™ so you can share Time Matters documents directly with clients, experts, and other third parties.

The online file-sharing service in Time Matters offers you tight control over and protection of shared files. You can:

- Define who can access the file—only the contact(s) associated with the matter, anyone with the same email domain as the contact(s) or everyone
- Determine what they can do with the document—view, print or download
- Prevent screen captures of the file by displaying only small areas at a time
- Identify the timeframe that they can access the document
- Track the file's whereabouts at all times and maintain an audit trail for compliance purposes
- Revoke access to files anytime

Your contacts are notified of shared files by email and can view the files from any Internet-connected computer, smartphone or tablet.

What is my storage limit as a firm or a user?

The online storage limit is on a firm basis and allots up to 5 GBs of data (per firm) to be shared and available online at one time. LexisNexis reserves the right to modify this limit at any time.

What web site do I use to access shared documents away from the office?

Use the following web site address to access shared documents when you are away from the office.

https://clientshare.lexisnexis.com/

Document sharing Time Matters user questions

How do I share documents securely with my clients?

The Document Sharing Portal lets you provide access to selected documents to clients and other people outside your firm.

To share documents:

1. Open the Matter whose related documents you want to share.
2. Click the **Documents** tab.
3. In the sublist of related documents, tag (click the check box beside) each document you want to share.
4. Click the **Share** button on the sublist toolbar.
5. The Share Documents window opens. See the section below for additional information about this window.
6. In the Select Recipients area, click the check box beside each Contact with whom you want to share the documents.

   Only Contacts related to the Matter appear in this list.
7. If a selected Contact does not have an email address, type the Contact's address in the box in the **Email** column.
8. If you want to add recipients that do not appear in the list, type their email addresses in the **Additional Recipients** box. Insert commas between addresses.
9. In the Sharing Options area, select the options you want.
10. Click the **Share Documents** button.

Document Sharing window

On this window, select document sharing options and the recipients who will have access to shared documents. The Document Sharing window opens after you tag one or more documents on the Documents tab of a Matter form and click the **Share** button on the sublist toolbar.

Documents Selected area

This box shows all the documents you tagged on the sub-list of the Documents tab. Documents that cannot be shared are indicated by the icon . The reason the document cannot be shared is displayed in the Notes column.

Select Recipients area

This box shows all Contacts related to the Matter whose documents are being shared.

Click the check box beside each Contact you want to share with. If a Contact does not have an email address, enter the address in the box in the Email column.

You can specify other recipients besides Contacts related to the Matter. To do so, enter the email addresses for those recipients in the Additional Recipients area. (When entering multiple email addresses, insert a comma between each address.)

Sharing Options area

Select the settings to apply to the documents you are about to share.

Screen Element	Description
User permissions	Select whether users will be permitted to view the documents completely, view the documents through a spotlight-like viewing window, view and print the documents, or will have full access to view, print, and edit the documents.
Document access expires	Select one of the predefined expiration periods, or select Specific Date and enter the date on which document access will expire. You can enter a date by clicking the calendar icon and selecting a date on the calendar, or by typing the date in the format mm/dd/yyyy.
Grant file access to	Select whether to grant file access to the recipients only, to everyone who shares the same email domain as the recipients and who has a document sharing account, or to everyone with a document sharing account.
Watermark	Select whether or not to place a watermark on PDF documents that you share.

How long can I share files?

You can determine how long you would like to share each document. Your options are:

- User specified date
- 1 day
- 3 days
- 1 week
- 2 weeks
- 1 month
- 3 months
- 6 months
- 1 year
- Never

Note

The online file-sharing service is designed for short-term file-sharing with and access by clients and other third parties. It is not designed to be used for long-term file storage. Although we allow a "Never" expire option, LexisNexis reserves the right to require users to clean up dated files at any time.

What type of Time Matters documents can I share?

You can share any type of document that is in Time Matters or in a supported document management solution.

For a list of currently-supported document management solutions, visit http://support.lexisnexis.com/timematters/record.asp?ArticleID=10934#5.

What Time Matters security applies to sharing documents?

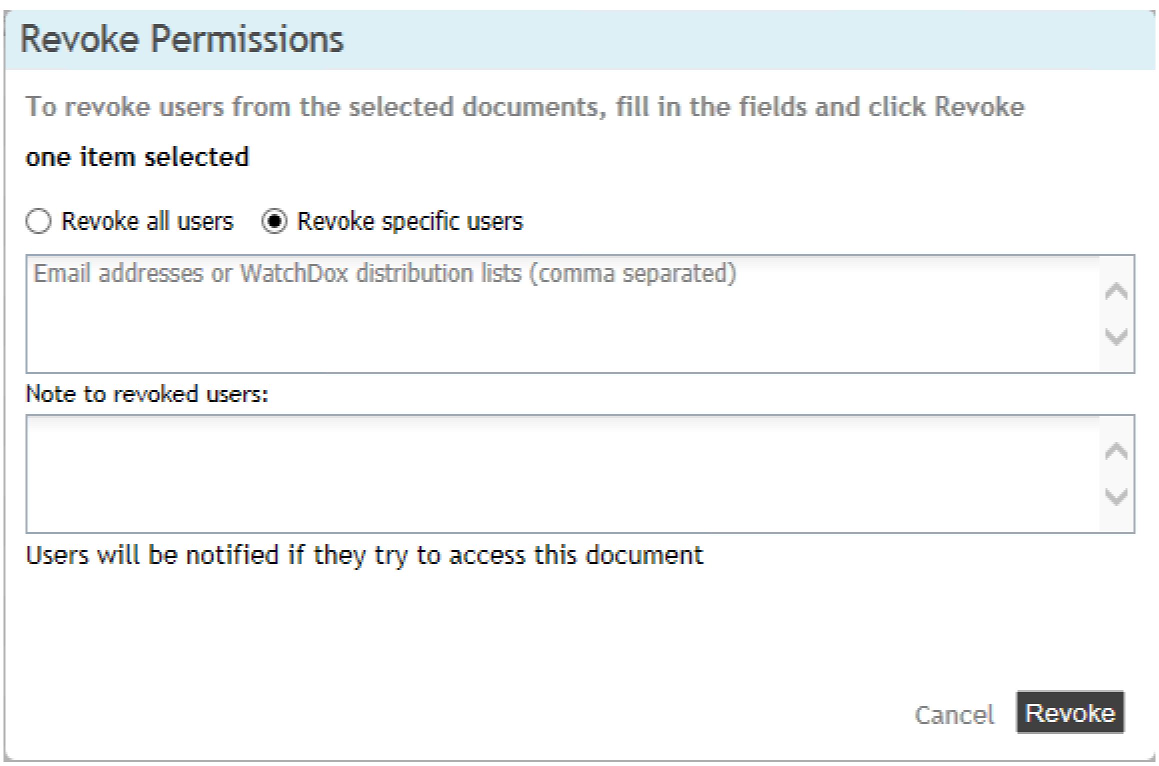
If security is enabled, any security settings configured for a user for normal and private Document records (including special exceptions) will be enforced when each Document record is shared. If the TM user doesn't have rights to change or view the selected Document record, they will not be allowed to share that file on the portal.

How do I remove document access from clients I've already shared with?

To remove document access from clients, perform the following from within WatchDox:

1. Click the **My Document** tab at the top of the document sharing portal.
2. Expand the **Exchange** branch in the navigation tree on the left.
3. Click on **Sent Items**.
4. Select the document(s) for which you want to remove client access.
5. Click on **Permissions**.
6. Click the **Revoke Users** option.

   The Revoke Permissions page opens.

7. Select to revoke access to *all user* or *specific users*.

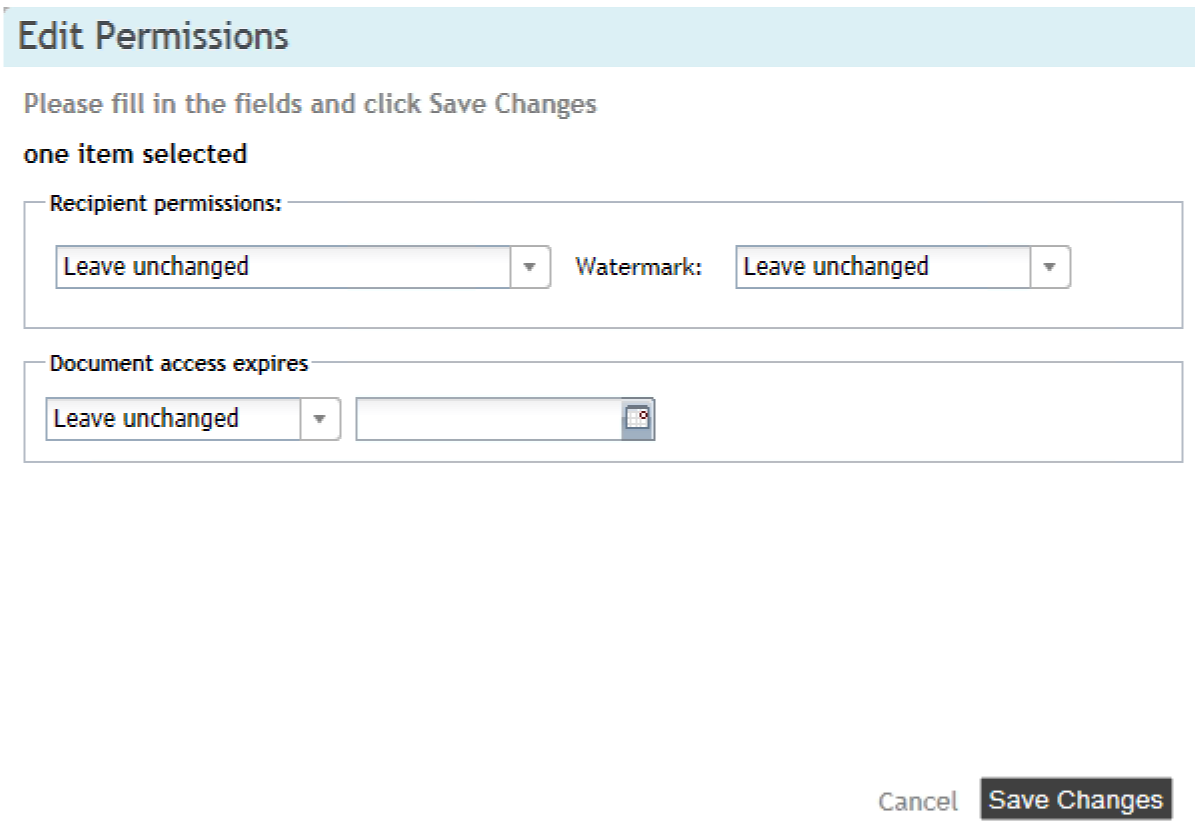
8. If you select 'Revoke specific users,' type the email address for each user.
9. In the **Note to revoked users:** text box, type the message you want displayed to revoked users who attempt to open the document.
10. Click the **Revoke** button.

How do I change the sharing options after they are initially set?

To change the sharing options after they are initially set up, perform the following from within WatchDox:

1. Click the **My Document** tab at the top of the document sharing portal.
2. Expand the **Exchange** branch in the navigation tree on the left.
3. Click on **Sent Items**.
4. Select the document(s) for which you want to change the sharing options.
5. Click on **Permissions**.
6. Click the **Edit Permissions** option.

   The Edit Permissions page opens.

7. Edit the options you need to change.
8. Click the **Save Changes** button.

What happens when a document expires?

The document displays as expired in the Inbox of the recipient(s). They will not have the ability to download or view the file. If necessary, the recipient(s) can request an extension to their access period.

If I delete files from WatchDox online, will it delete them in Time Matters?

If you delete files from WatchDox, they are not deleted from Time Matters. When you upload a file in Time Matters to WatchDox, only a copy of the file is uploaded, therefore, deleting the file on WatchDox does not delete the file in Time Matters.

If I update a shared file, is it automatically updated on the sharing portal?

No. Only a copy of the file as it exists at the time of sharing is uploaded to WatchDox and updating the file in Time Matters does not automatically update the file on WatchDox. For your client to receive the updated version of the file, you need to re-share the file with them (sharing that version of the file).

How do I get a shared file from a client back into Time Matters?

To have the file saved into Time Matters, download and save the file locally or within your firm’s network. Then create a Document record linked to the file, or update the file linked to an existing Document record.

When logging into WatchDox for the first time, what do I need to do?

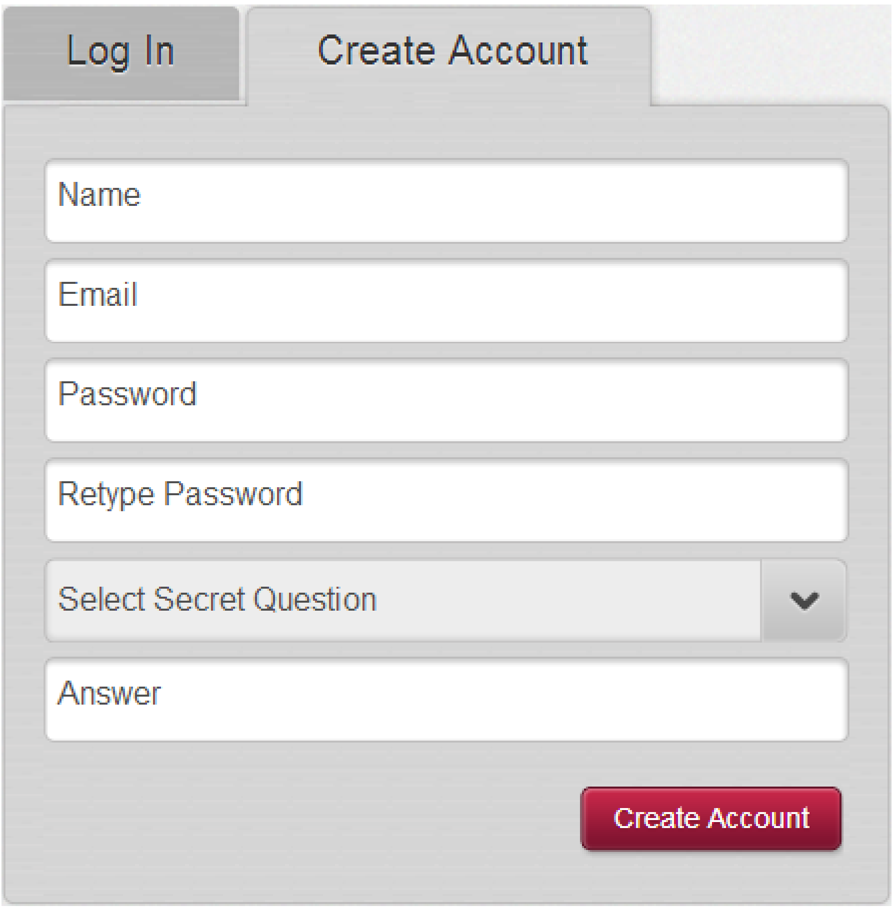
Although Time Matters has created an account for you, you still need to create a password and secret question for your account. Refer to the section on creating a user account on the document sharing portal.

Document sharing client user questions

How do I create a user account on the document sharing portal?

The first time someone shares a document with you, a notification email is sent to you with a link to the document sharing portal.

1. Click the link in the notification email to go to the document sharing portal (powered by WatchDox).
2. Click the Create Account tab.



3. In the **Name** box, type your name. This is the name used by default in the subject line of emails generated when you send documents to other people.
4. In the **Email** box, type the email address to which the notification email was sent.
5. In the **Password** and **Retype Password** boxes, type the password you want to use. It is highly recommended that your password includes at least three of the following: uppercase letters, lowercase letters, numbers, and special characters (such as $, #, !, etc.).
6. Click the arrow beside the **Select Secret Question** box and select a question from the drop-down list. This question is used to verify your identity if your password is lost or forgotten.

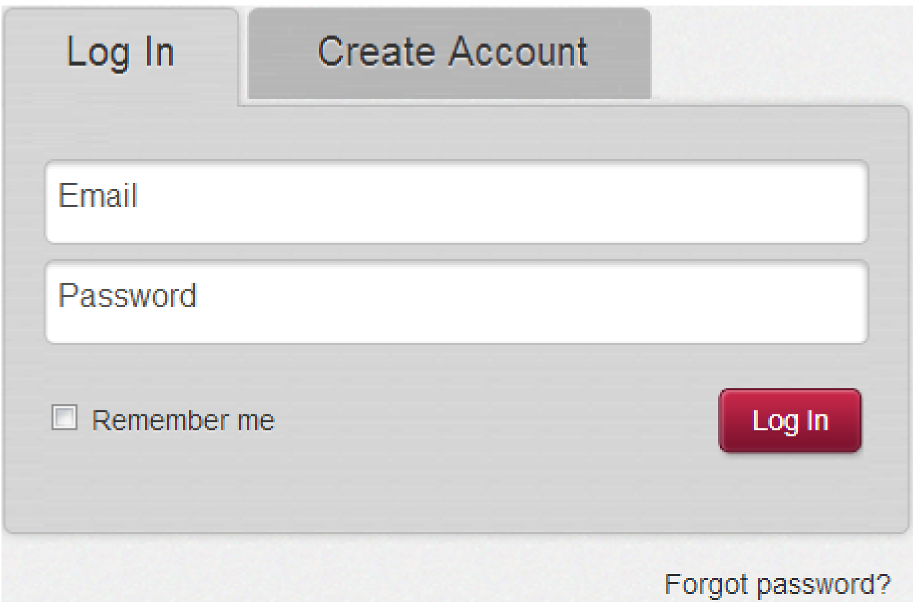
7. In the **Answer** box, type the answer to the question you selected. (It is recommended that you use a simple, one word answer that will be easy to remember.)
8. Click **Create Account**.

   An email is sent to the email address provided on the account, to authenticate the email address.
9. In the authentication email, click on the link to finalize the creation of your user account.

How do I log in and log off of the document sharing portal?

Log in to the portal:

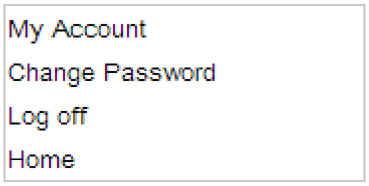
1. Go to the document sharing portal URL: `https://clientshare.lexisnexis.com`
2. On the Log in tab, type your email address in the **Email** box and your password in the **Password** box.



3. Optionally, select the **Remember me** box to store your login information so that you will not have to enter it on subsequent visits. (For the security of your documents, only use the "Remember me" option on a secure, password-protected computer.)
4. Click the **Log In** button.

Log off of the portal:

1. Click the arrow beside your user name (email address) in the top right corner of the window.



2. Click **Log Off**.
3. Click **OK**.

How do I restore access when my password is lost?

1. On the document portal login page, click the link **Forgot password**.
2. In the **Email** box, type the email address you use to log in to the document sharing portal.
3. Click **Continue**.
4. Locate and open the "Restore Password" email that was automatically sent to you.
5. Click the link in the email.
6. In the **Answer** box, type the answer to the secret question you selected during account creation.
7. Click **Retrieve Password**.
8. In the **New Password** and **Retype New Password** boxes, type the password you want to use.
9. Click **Submit**.
10. Click the **log in** link.
11. Log in using your new password.

How do I change my password on the document sharing portal?

1. Click the arrow beside your user name (email address) in the top right corner of the window.
2. Click **Change Password**.
3. In the **Current Password** box, type the password you current use to log in.
4. In the **New Password** box, type the password you want to use.
5. In the **Retype New Password** box, re-type the same password you entered in step 4.
6. Click **Submit**.
7. Click **OK** to continue and close the new broswer/tab, once your password has been successfully changed.

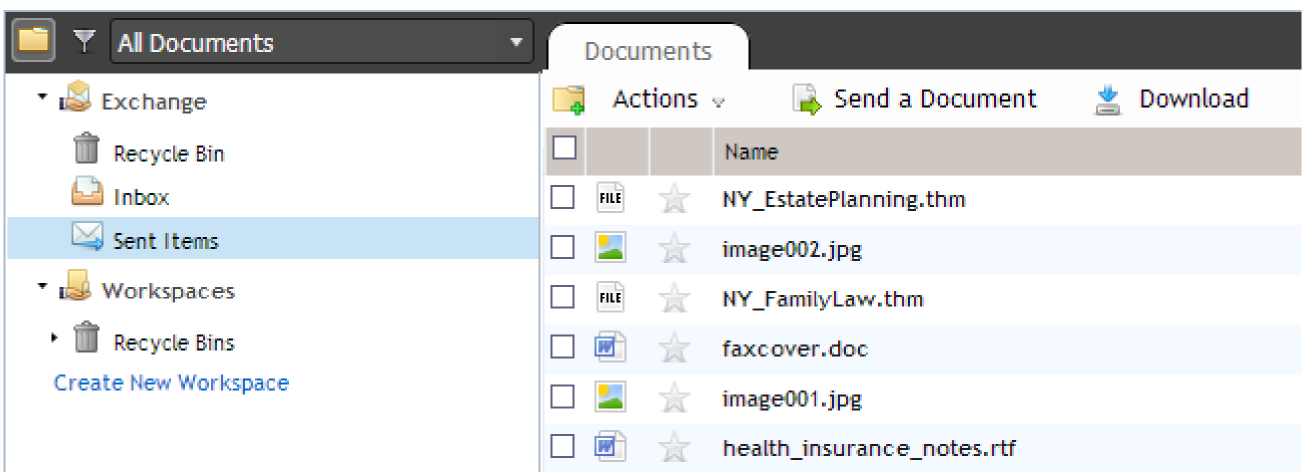
How do I view and edit my account info on the document sharing portal?

1. Click the arrow beside your user name (email address) in the top right corner of the window.
2. Click **My Account**.
3. On the **Account Info** tab, view your account type, administrative contacts, and subscription expiration date.
4. On the **User Info** tab, you can view and edit your name and other personal information. Click the **Update** button when you are finished.
5. On the **Account Management** tab, you can select or clear the option to receive daily updates by email regarding document activity. Click the **Update** button when you are finished.

How do I view documents on the document sharing portal?

1. On the document sharing portal, click the **My Documents** tab at the top of the window.
2. To view documents you have received, expand the **Exchange** branch in the navigation tree on the left and click **Inbox**.
3. To view documents you have sent, expand the **Exchange** branch in the navigation tree on the left and click **Sent Items**.

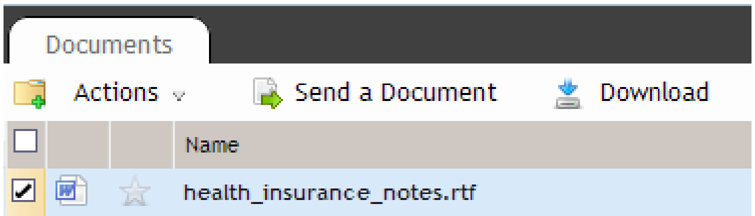
   The list of documents appears in the center area of the window.



4. Click the header of any column to sort that column by ascending or descending order. You can also resize columns by dragging the left or right border between column headers.

How do I download documents on the document sharing portal?

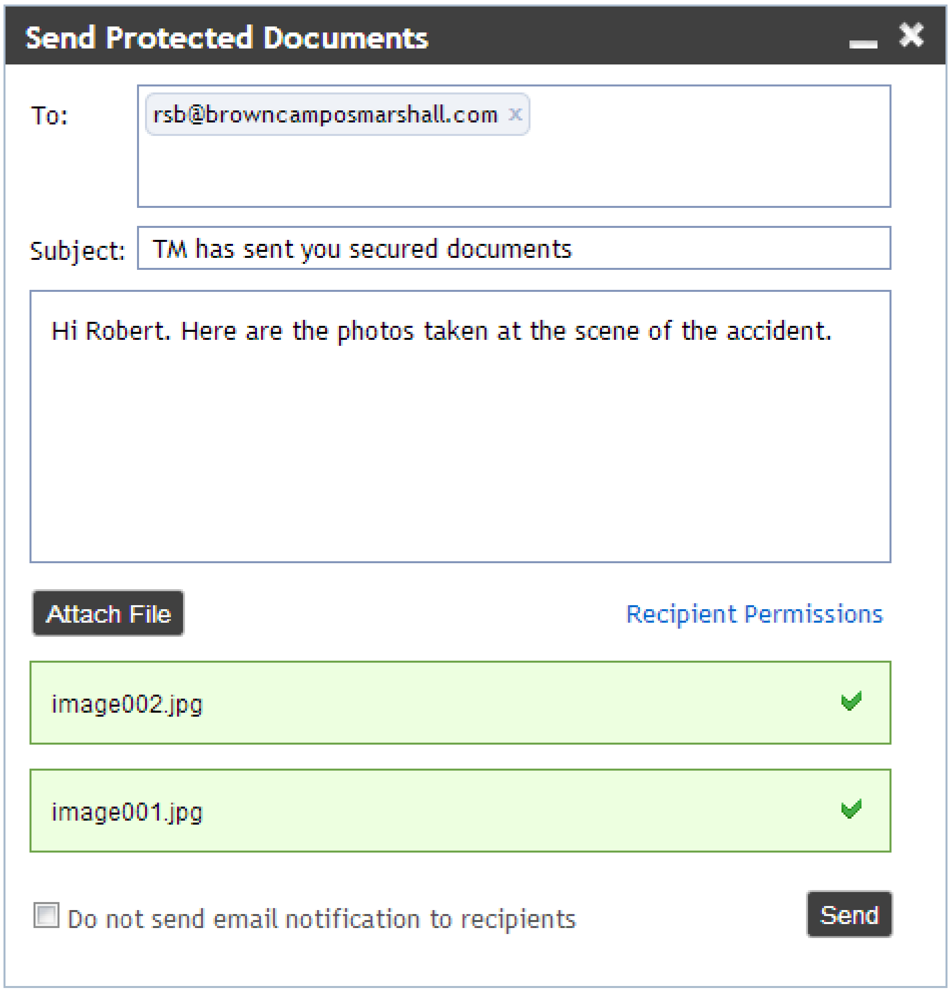
1. Select the check box beside each document you want to download.
2. Click the **Download** button on the toolbar.



How do I send a document using the document sharing portal?

1. On the document sharing portal, click the **My Documents** tab at the top of the window.
2. Click the **Send a Document** button on the toolbar below the Documents tab.

   The Send Protected Documents window opens.
3. In the **To** box, type the email address of each recipient.
4. Optionally, modify the default text in the **Subject** box.
5. Type the message you want to send in the email notification in the text box.



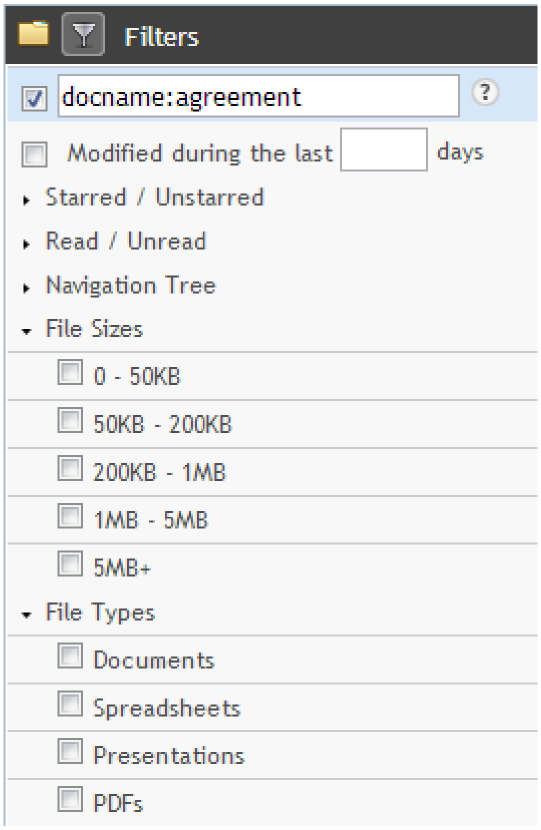
6. Optionally, click **Recipient Permissions** and set the following options:
   - **User permissions:** Select whether recipients will have full access to view, print, and download the shared document(s), or access to view and print, view only, or view a limited "spotlight" region of the document(s).
   - **Document access expires:** Select the date when these recipients will no longer have access to the document(s).

- **Grant file access to:** Select whether to give access to the selected recipients only (recommended) or to a broader group.
- **Watermark:** Select whether to apply a watermark to PDF documents.

7. Click **Attach File**.
8. Browse to the document(s) you want to share. Select the document(s) and click **Open**.
9. Click **Send**.

How do I search for a document on the document sharing portal?

1. On the document sharing portal, click the **My Documents** tab at the top of the window.
2. Select **Exchange** in the navigation tree on the left.
3. Click the **Filter** icon ( ) on the toolbar.

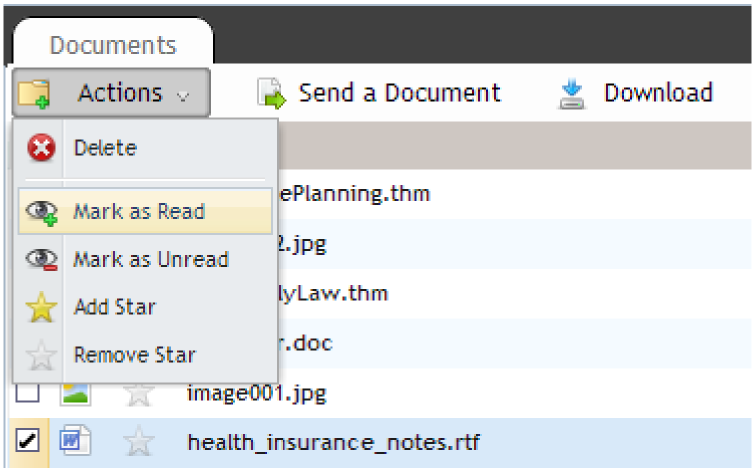


4. To find documents matching a set of criteria, expand the filter categories on the left and select the check boxes beside the criteria you want to include. For example, you could find PDF documents under 1MB by selecting the following boxes: **PDFs**, **0-50KB**, **50KB - 200KB**, and **200KB - 1MB**.
5. To find documents by search terms, use the search box at the top of the left pane. You can specify whether you are searching for a document by name, by email address (of the document's owner), or by content within the document.
   - To search by document name, type docname: followed by a portion of the name you want to find.
   - To search by email address, type owneremail: followed by a portion of the email address.
   - To search by content, type content: followed by the keywords you want to find within the document.
   - You can combine these search types into a longer statement such as the following:

     ```
     docname: agreement AND owneremail: rsb@browncamposmarshall.com AND content: "Barry Able"
     ```

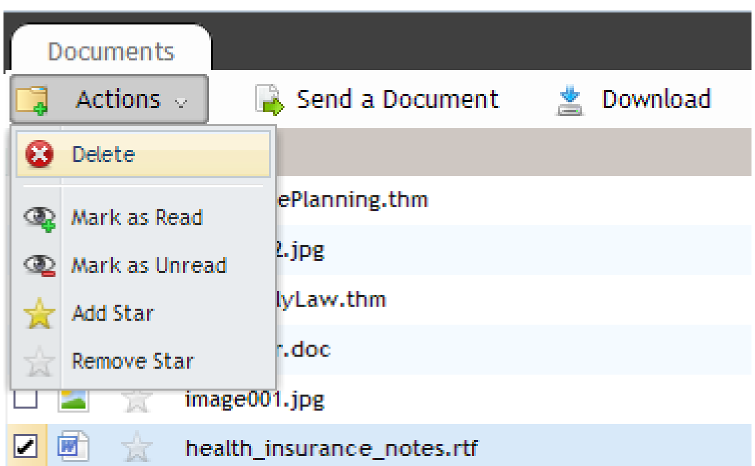

How do I mark a document as read or unread on the document sharing portal?

1. Select the check box beside each document you want to mark.
2. Click the arrow beside the **Actions** button on the toolbar and select **Mark as Read** or **Mark as Unread**.



How do I delete a document on the document sharing portal?

1. Select the check box beside each document you want to delete.
2. Click the arrow beside the **Actions** button on the toolbar and select **Delete**.



Communications

View your email

Each Time Matters user (not Staff) has a personal inbox for email sent to their account.

- Click the **Mail** menu and then click **Personal Inbox**.

You can also view email that has been moved from your personal inbox to the Email list.

Click the **File** menu, point to **Email List**, and click **All Email**.

Create and send email

1. Click the **Mail** menu and then click **Personal Inbox**.
2. Click the **New** button on the Inbox toolbar.

   An Email record form opens.
3. Complete the **Subject** box.
4. If the email is regarding a Contact or Matter, enter that Contact and/or Matter in the boxes on the **Regarding** line.
5. In the **To** box, type the addresses of the email recipients. You can also click the lookup button beside the box to select recipients from among Contacts, Staff, and distribution lists.
6. In the **Message** area, type the message you want to send.
7. To attach a file, do the following:
   a. Click the **Attachments** button.
   b. Click the arrow beside the **Add** button.
   c. Select **File** or **TM Document**, depending on how you want to identify the attachment.
   d. Locate and select the file(s) you want to attach.
8. When you are ready to send the email, click the **Send** button on the Email form toolbar.

Send instant messages to other Time Matters users

1. Click the **View** menu and then click **Messenger Window**.

   The Messenger opens.

2. Click the **Add** button.

   The Message form opens.

3. Click the lookup button beside the **To** box to select a Time Matters user as the recipient of the message.
4. Type your message in the **Message** area.
5. If you want to flag the message as urgent, click the **Urgent** button.
6. Click **Send** when you are ready to send the message.

Create a Phone record

1. Do one of the following:
   - Press Ctrl+Shift+P.
   - On the **File** menu, point to **New Record** and click **Phone Call**.
   - On the Phone Calls list, click the **Add** button.

   The Phone Call form opens.
2. Complete the **Date** and **Time** boxes, which are required.
3. In the **Code** box, click the arrow and select the classification code that best describes the nature of the phone call.
4. On the **Regarding** line, enter the Contact and/or Matter related to the phone call.
5. If the record is for an incoming call, enter the name of the caller or click the lookup button to select from a list of Contacts.
6. If the record is for an outgoing call, click the **In From** button to toggle the label to **Out To**. Then enter the name of the recipient or click the lookup button to select from a list of Contacts.
7. In the other areas of the Primary tab, enter other information about the phone call.
8. Click the **Save & Close** button.

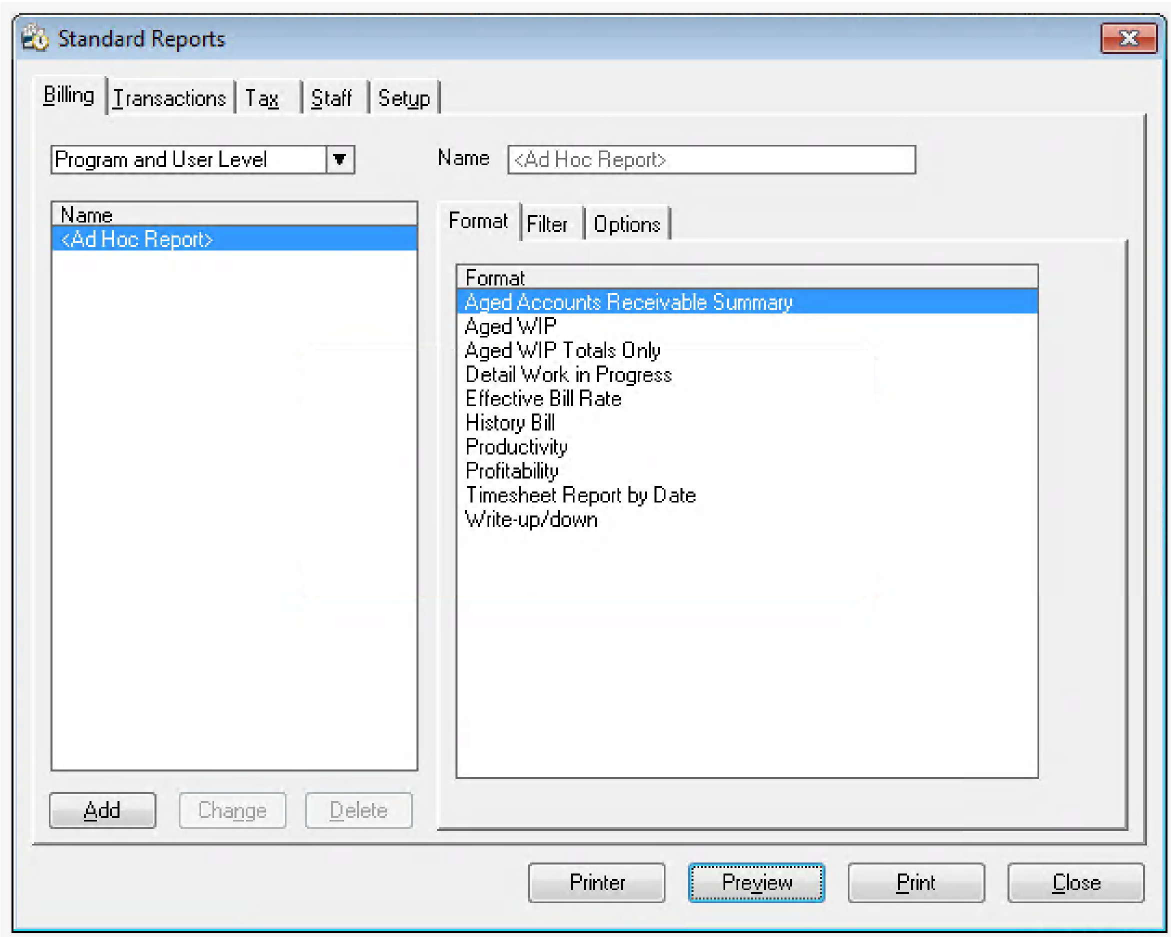
Reports

Print a standard report

1. Click the **Report** menu and then click **Standard Reports**.

   The Standard Reports window opens.

2. Select the tab related to the type of report you want to print: **Billing**, **Transactions**, **Tax**, **Staff**, or **Setup**.



3. Select the report level: Program, User, or both Program and User.

4. On the **Format** tab, select the report you want to create.

5. On the **Filter** tab, select the criteria a record must meet to be included in the report. (These options are different for each report format.)

6. On the **Options** tab, select any additional report options you want. (These options are different for each report format.)

7. Click the **Printer** button.

   The Print window opens.

8. Select the printer you want to use and set other print options.
9. Click **OK** to print the report.

Export a record list as an Excel spreadsheet

1. Open the list you want to export.
2. Right-click the list toolbar and select Edit Columns.

   The Edit List Fields window opens.
3. Ensure that the **In List** box includes the columns you want to include in the spreadsheet, ordered the way you want. Select the name of a column in the **Available Fields** box and click the **Add** button to move it to the **In List** box. Select the name of a column in the **In List** box and click the **Up** or **Down** button to move it earlier or later in the list. Columns earlier in the list appear closer to the left.
4. Click **OK**.
5. Optionally, click the **Search** button on the list toolbar and enter search criteria to filter the list to show only the records you want to include in the spreadsheet. Click **OK**.
6. Click the Send to Excel button on the list toolbar.

   (If the button does not appear on the toolbar, click the Options button to open the List Options window, select the List Toolbar tab, select **Send to Excel** in the Available Buttons box and click **Add** to move it to the Show on Toolbar box. Click **OK** to save your changes.)

   The list is exported to an Excel spreadsheet.

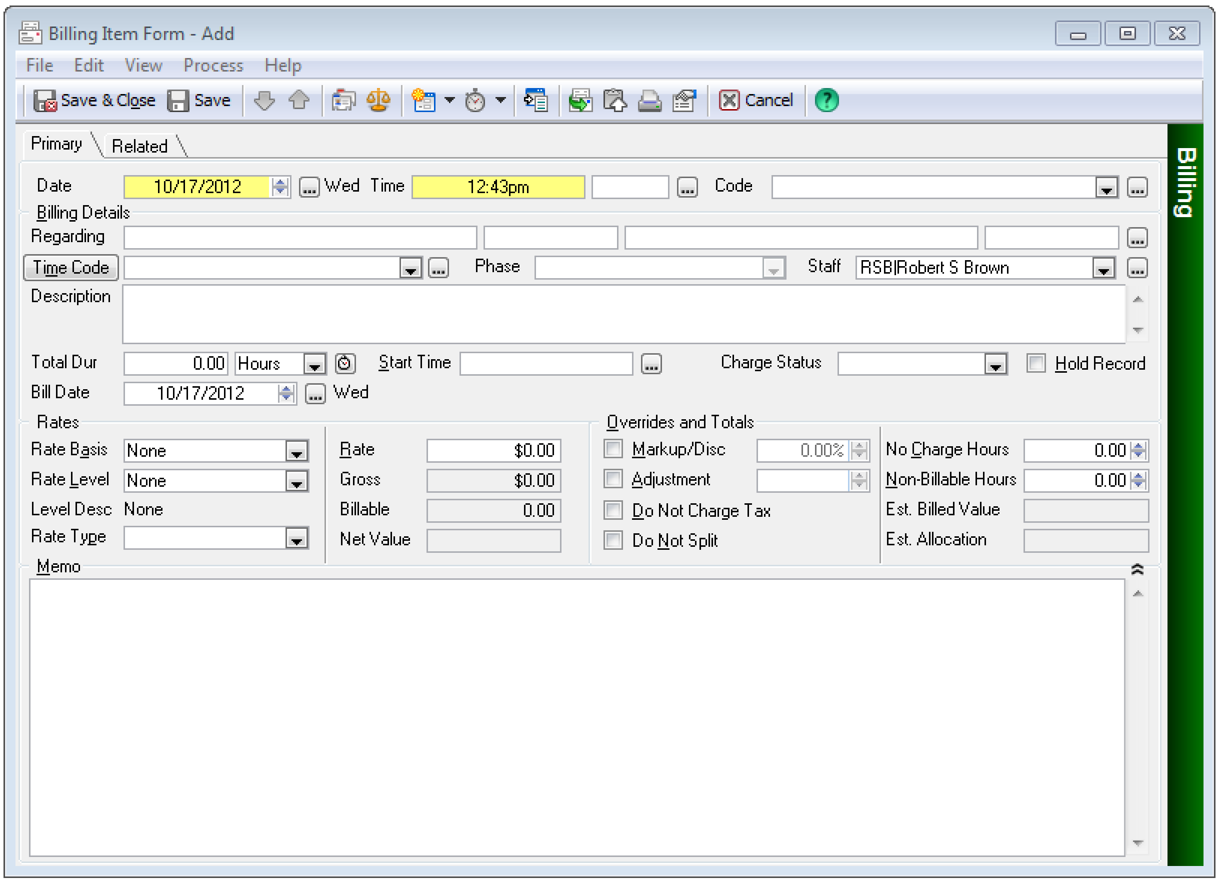
Time and billing

Create a timesheet

1. A timesheet is for entering time and expenses on an ongoing basis.
2. On the **Billing** menu, click **Timesheet**.

   The Timesheet window opens.
3. Click the **Add** button on the Timesheet toolbar.

   A Billing Item form opens. The **Date** and **Time** boxes are pre-filled with the current date and time. You can change them if necessary.



4. By default, the form is for entering time. To enter expenses, click the **Time Code** button. The button label changes to **Exp Code**, and several fields on the form are changed to reflect expense information.
5. Complete the **Code**, **Description**, **Staff**, and **Regarding** boxes.
6. In the lower area of the form, enter information about the amounts and rates.
7. Click the **Save & Close** button. The entry appears on the Timesheet window.

Set up basic billing

1. Click the **File** menu, point to **Setup**, then point to **General**, and then click **Program Level**.
2. Click the Links tab and the Billing subtab. (If the Billing subtab does not appear, click the main Billing tab and ensure that the **Activate Billing Matters** check box is not checked.)
3. Click the **Activate Billing** check box.
4. Select **Basic Billing** in the **Select Billing Link** drop-down list.
5. Click the **Set Billing Options** button. The Time Matters Billing Setup window opens.
6. Set options on the General tab:
    a. Select whether to bill by Contacts, Matters, or Contacts and Matters.
    b. Type the number to use for the first (or next) invoice you create in the **Next Invoice Number** box.
    c. Select **Allow changes to Billing Form** if you want to enable customization of Billing forms.
    d. Select **Allow Time Matters Records to be billed more than once** if you will allow records to be billed multiple times.
    e. Select **Allow Billed Recordsto be on more than one Time Matters Invoice** if you will allow billed records to show on more than one invoice.
7. Click the Rates tab to add or modify rate tables.
8. Click the Setup tab to modify additional billing options, such as setting a global rate for your business, a default billing basis, and a default rate level.
9. Click the Address tab to select the fields used to complete the Bill To area of invoices.
10. Click **OK** to close the Time Matters Billing Setup window.
11. Click **OK** to save your changes and close the Program Level Setup window.
12. To activate billing for each user that will need access to the billing functions, go to **File > Setup > General > User Level**.
13. Select a user from the drop-down list in the top left corner of the User Level Setup window.
14. Click the Links tab and the Billing subtab.
15. Select the **Activate Billing** check box and click the **Set Billing Options** button. The Time Matters Billing Link Options window opens.
16. Select whether to use Program Level settings or to specify individual user settings for the available options.
17. Click **OK** to close the Time Matters Billing Link Options window.
18. Click **OK** to save your changes and close the User Level Setup window.

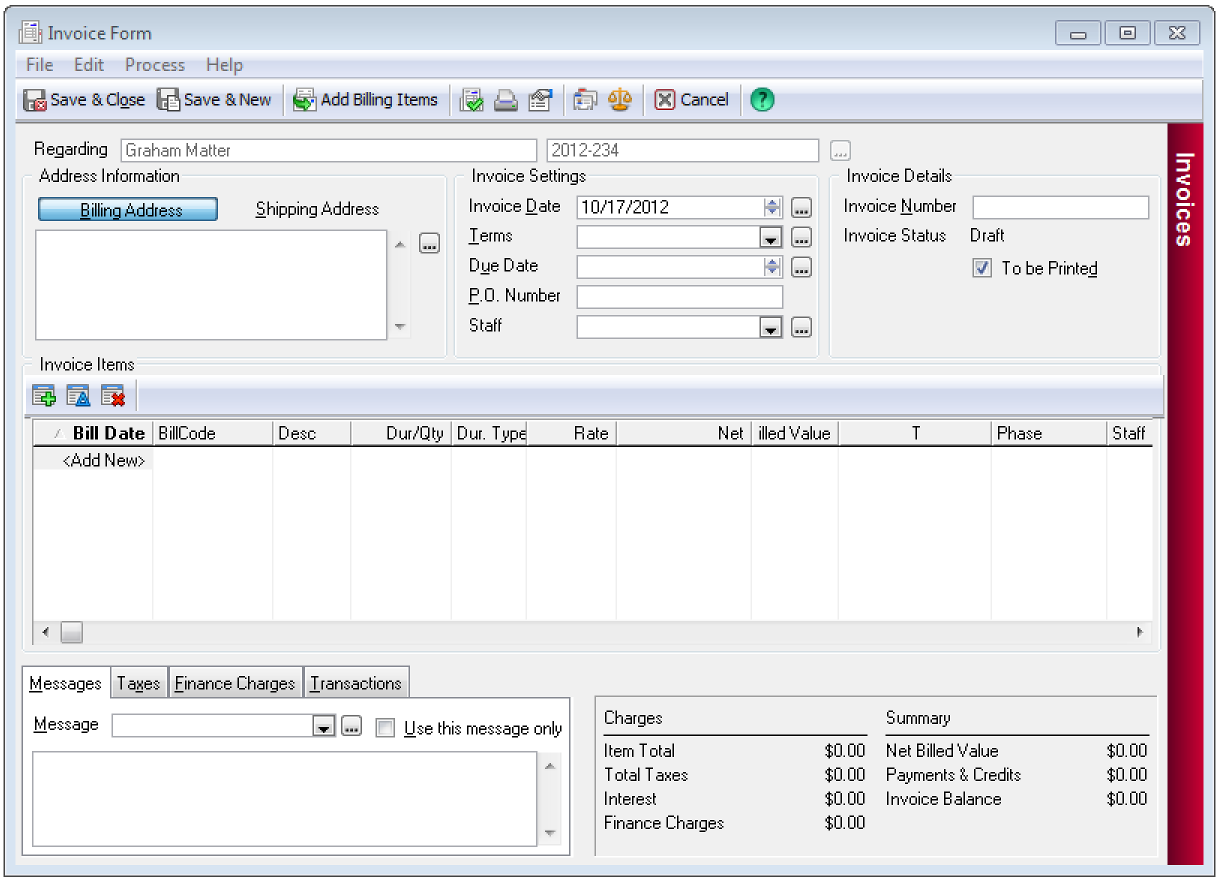
Create an invoice

1. On the **Billing** menu, click **Invoice List**.

   The Invoice list opens.

2. Click the **Add** button on the list toolbar.

   An Invoice form opens.



3. If billing by contacts, select a contact for the **Regarding** field. If billing by Matter or Contact-Matter, or with Matter as a default, select a Matter for the **Regarding** field.

4. Billing Address will complete automatically when a contact or Matter is selected in the **Regarding** field. Shipping Address may be completed manually and is not necessarily the same at the billing address.

5. In Invoice settings, enter the date for the invoice in the **Invoice Date** field.

6. Select the Terms in the **Terms** field to apply to this invoice.

7. Enter the due date for payment of this invoice in the **Due Date** field.

8. Enter the purchase order number, if required, in the **P.O. Number** field.

9. In the Invoice Details area, enter the Invoice Number. Note that this field may be grayed out depending on how your administrator set up billing for your firm.

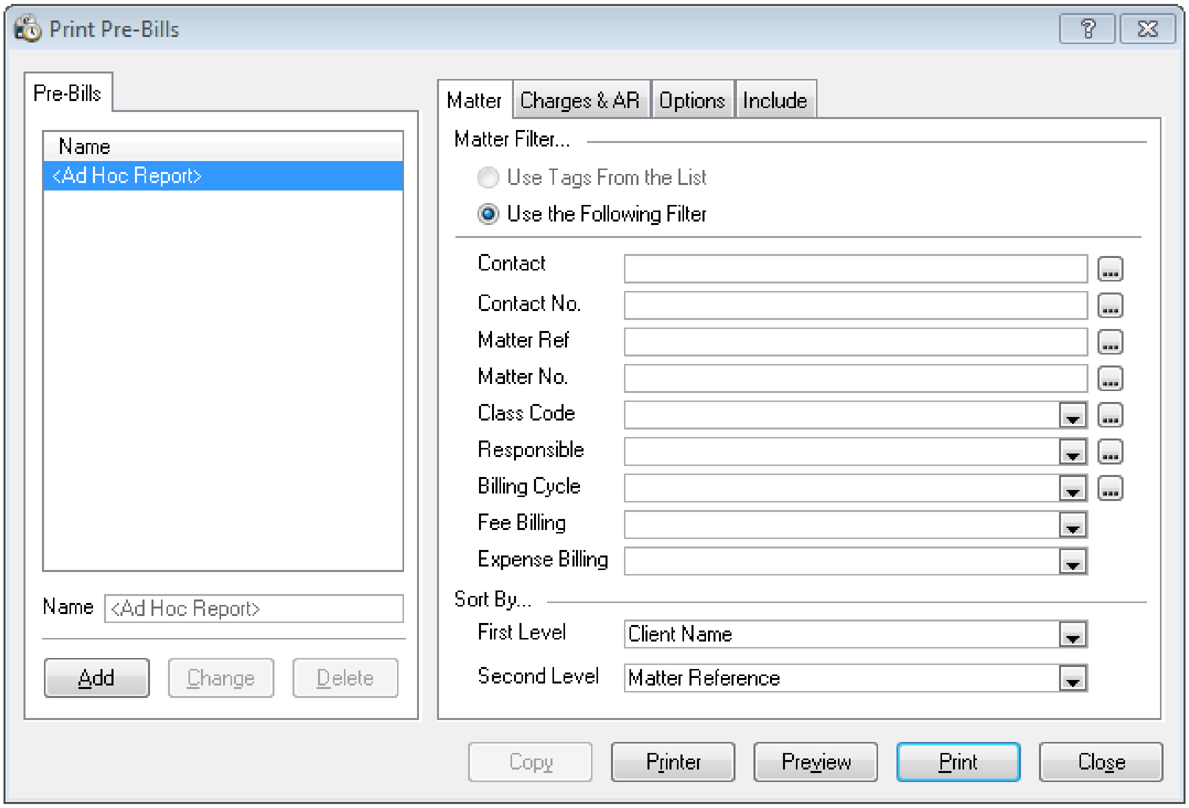
10. Select the **To be Printed** check box if the invoice is to be printed at a future date.

11. In the Invoice Items area, add billing items to the invoice in 2 ways; the first method is to type them directly. The second method is to click the **Add Billing items** button to open the Billing Item List.
12. To print the invoice immediately once it’s complete, click **Print**.
13. Click **Save & Close** to save this invoice and close the window.

Print a prebill

1. On the **Billing** menu, click **Print Pre-bills**.

   The Print Pre-bills window opens.

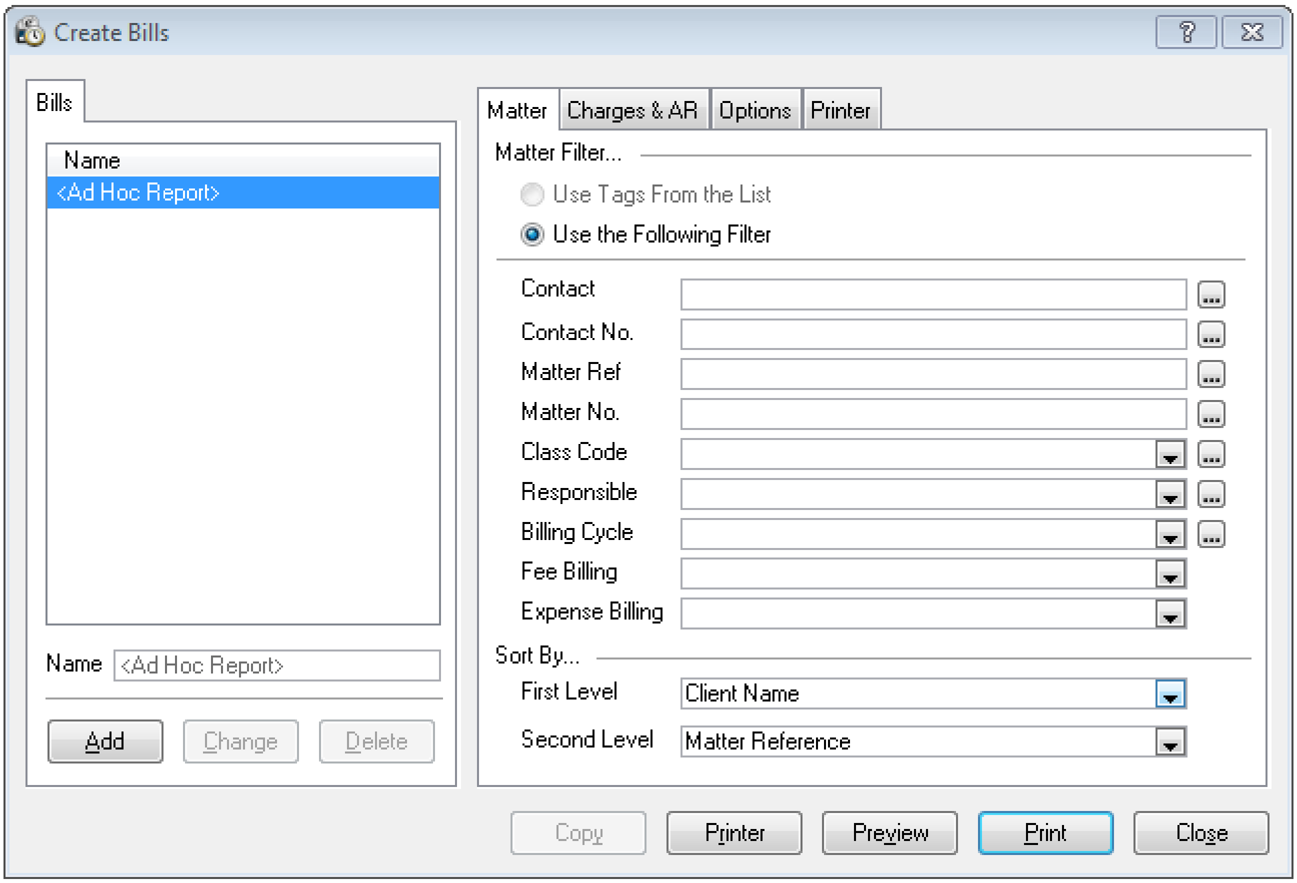


2. On the Matter tab, select criteria to include pre-bills for specific Matters.
3. On the Charges & AR tab, set options to define how work-in-progress will be filtered.
4. On the Options tab, select options to broaden or narrow the filter of items for which pre-bills will be printed.
5. On the Include tab, define information that will not be printed on the bill.
6. Click **Print**. The printed copies can be distributed for review.

Create a bill

1. On the **Billing** menu, click **Create Bills**.

   The Create Bills window opens.



2. On the Matter or Contact tab, specify the client records that are ready for billing.
3. On the Charges & AR tab, set options to define how work-in-progress will be filtered.
4. On the Options tab, select options to broaden or narrow the filter of items for which pre-bills will be printed.
5. Click the **Print** button.

Post or undo a bill

1. On the **Billing** menu, click **Post or Undo Bills**.

   The Post or Undo Bills window opens.

2. Tag the bills you want to post or those that you want to undo.
3. Click the **Post** button to post the tagged bills, or click the **Undo** button to undo the tagged bills.

PCLaw link

PCLaw link overview

With the PCLaw link, you can easily capture the billable hours you spend working in Time Matters and send that information to PCLaw for billing.

Before you install

Do the following before you set up the PCLaw link:

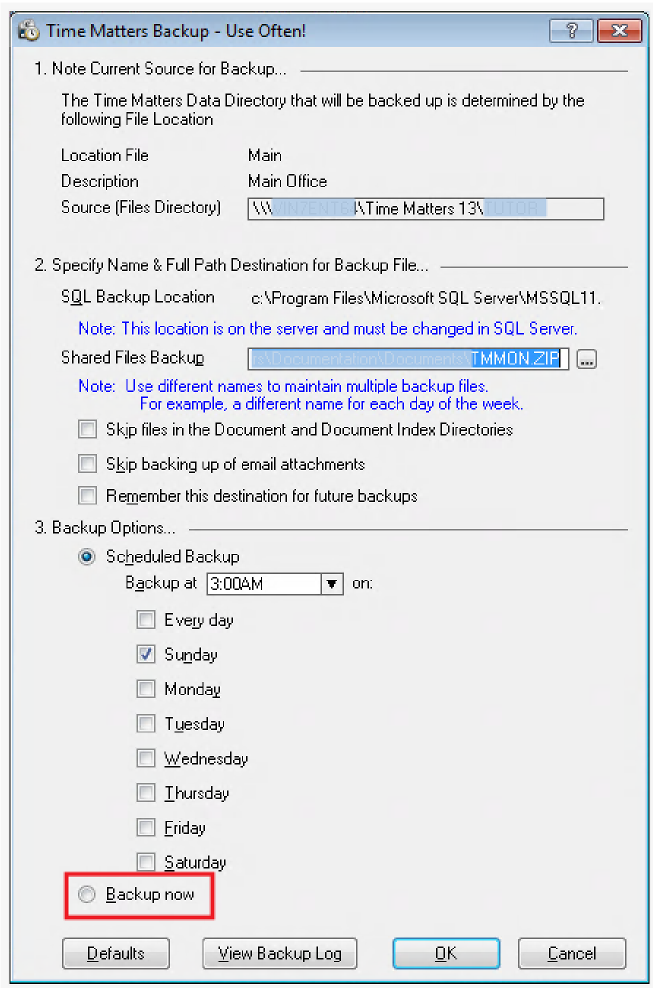
- Back up your Time Matters 13 database.
- Back up your PCLaw database.
- If necessary, set up the PCLaw Remote Client Server. This is necessary if the full PCLaw client (version 9.30 or later) is not installed on each computer where the PCLaw link will be used.

Instructions for each of these procedures follow.

Back up your Time Matters database

1. Select **File** > **Backup Time Matters Data** from the Time Matters menu.

   The Time Matters Backup window opens.



2. (Optional) In the **Shared Files Backup** box, type or select a different backup file name.
3. (Optional) Select the types of files (documents and/or email attachments) that you want the backup to *skip*.
4. Select the **Backup now** option from the Backup Options... area.
5. Click **OK**.

   The Begin Server Backup Now window opens.
6. Click **Yes**. When the SQL database backup is complete, the Server Backup Completed window opens.
7. Click **OK**.

   The Begin Backup Now window opens.
8. Click **Yes**.

9. When the process is complete, click **OK** to close the window.

> **Note**
>
> Time Matters SQL database backups are stored in a different location than backups of Time Matters document and email files. The default location of SQL backup data is: `C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup` or `C:\Program Files(x86)\Microsoft SQL Server\MSSQL.1\MSSQL\Backup`

Back up your PCLaw database

1. In PCLaw, go to **File** > **Backup/Restore** > **Backup Data**.

   A message window opens, reminding you to ensure that you are the only user running PCLaw. If other users are running PCLaw, wait until they have exited PCLaw before proceeding.

2. Click **Yes** to continue.
3. If a window opens displaying a message about what information is included in the backup, click **OK** to close the window and continue.

   The PCLaw Archive - Export File window opens.

4. Select a location to save your backup file, and enter a file name.

   > **Note**
   >
   > It is recommended that you include the current date in the file name, for easy identification and to avoid overwriting older backup files.

5. Click **Save** to create the backup file.

Set up the PCLaw Remote Client Server

Perform these steps on a computer with the full PCLaw client installed, and with network access to other computers that will use the Remote Client.

1. Create a shared folder on the computer. This folder will be used by remote clients to send requests to PCLaw.

   > **Note**
   >
   > A good idea is to create the shared folder within the existing PCLaw data path, such as: `\\computerName\PCLaw Data\Data\Remote`

2. Close all open applications on the computer.
3. In PCLaw, go to **Options** > **Connection Settings**.

   The Connections Settings screen opens.

4. Select the **Use This Set of Books when Connecting with Other Programs** check box.
5. Click **Configure Remote Server Settings**.

   The PCLaw Remote Client Server Configuration Utility screen opens.
6. Enter the full path to the folder you set up in step 1.

   Note

   Use Universal Naming Convention syntax. For example, `\\computerName\PCLaw Data\Data\Remote`
7. Click **Next**.

   The PCLaw Link Service: Log on As window opens.
8. Enter your domain\user name, password, and confirmation password.

   The PCLaw Link Service Installed window opens.
9. Click **OK**.

   A second PCLaw Link Service: Log on As window opens.
10. Enter your domain\user name, password, and confirmation password.
11. Click **OK**.

    The PCLaw Log Service Installed window opens.
12. Click **OK**.

    A third PCLaw Link Service: Log on As window opens.
13. Enter your domain\user name, password, and confirmation password.
14. Click **OK**.

    The PCLaw Time Matters Service is Running window opens.
15. Click **OK**.

    Note

    If the Time Matters login screen opens, the Server Utility is creating a link to Time Matters to send the location of the redirect path for the Remote Client. (Login may not be required at this time.)

    The Action Complete window opens to confirm registration.
16. Click **Done**.
17. Open Time Matters and complete the PCLaw Link Setup at the Program Level and PCLaw Link Setup at the User Level to re-initialize the PCLaw Link.

> **Note**
>
> The system must be restarted to restart the services and to load the link from the Client after you have re-initialized the PCLaw Link.

Set up the link in PCLaw

1. Open PCLaw with the set of books you want to use to link to Time Matters.
2. Click the **Options** menu and then click **Connection Settings**.
3. The Connection Settings window opens.
4. Select **Use this Set of Books when Connecting with Other Programs**.
5. Click **OK**.

Set up the link in Time Matters

1. In Time Matters, click **File** > **Setup** > **General** > **Program Level**.

   The Program Level Setup window opens.
2. Click the **Billing** tab.
3. If the **Activate Billing Matters** check box is selected, do the following:
   a. Clear the check box.
   b. Click **OK**.
   c. Close and reopen Time Matters.
   d. Open the Program Level Setup window.
4. Click the **Links** tab.
5. On the Billing subtab, select the **Activate Billing** check box.
6. In the **Select Billing Link** box, click the arrow and select **PCLaw**.
7. Click the **Set Billing Options** button.
8. If the full PCLaw client is not detected on this computer, Time Matters will prompt you to install the PCLaw Remote Client. See "PCLaw Remote Client Setup" for additional information.

   Time Matters initializes the PCLaw link. When the link has loaded, the PCLaw Link Setup window opens.
9. On the General tab, select the settings you want. For a description of each item on this tab, see PCLaw Link Options.
10. On the Billing Options tab, select the default settings you want. For a description of each item on this tab, see PCLaw Link Options.

> **Note**
>
> These settings can be modified for each user in User Level Setup.

11. Click **OK**.
12. If there is PCLaw link data from a previous version of Time Matters, you will be prompted to convert the existing data for Time Matters 13.0. Follow the on-screen instructions to create a backup of your database and begin the data conversion.
13. Click **OK** to close the Program Level Setup window.

Set up the PCLaw billing link with Time Matters

This is an overview of the steps needed to set up the PCLaw billing link.

1. Verify that your installed version of the PCLaw software is compatible with the Time Matters® software.
2. Create a backup of the Time Matters and PCLaw software databases.

   Note

   Restoring a backup is the only way to reverse the outcome of a synchronization.

3. Configure the PCLaw book set to connect with third party applications.
4. Disable Billing Matters to enable linking to a third party billing application.
5. Configure the Time Matters software to link with the PCLaw software.
6. Associate Time Matters Matters with PCLaw Matters.
7. Click **File** and select **Synchronize** and **PCLaw** if you want to move data into Time Matters from PCLaw.

   Note

   Changes made to Time Matters contact or matter records linked to the PCLaw software transfer upon saving and closing the record. Changes made to PCLaw clients or matters linked to the Time Matters software transfer through manual synchronization.Restoring a backup is the only way to reverse the outcome of a synchronization.

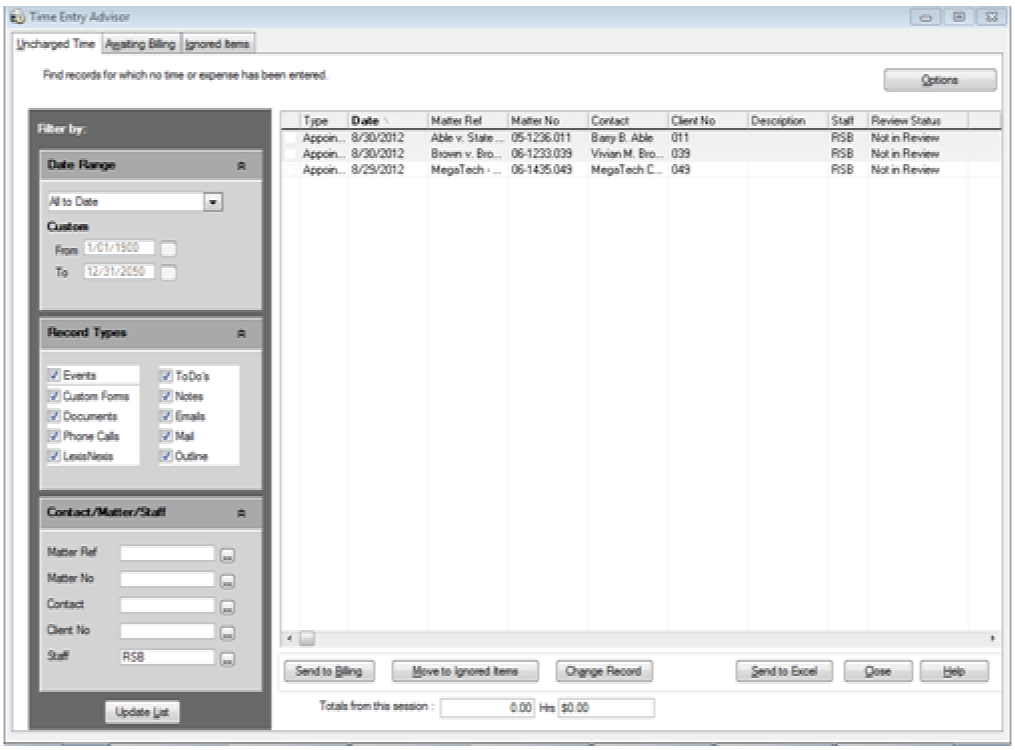
Time Entry Advisor

Time Entry Advisor overview

The Time Entry Advisor helps you keep track of work that has not yet been billed.

The Time Entry Advisor window has three tabs:

- **Uncharged Time**: view billable records and send them to your billing system
- **Awaiting Billing**: view records sent to billing that have the Hold Record box selected
- **Ignored Items**: view records for which a decision was made not to bill



View records on the Time Entry Advisor

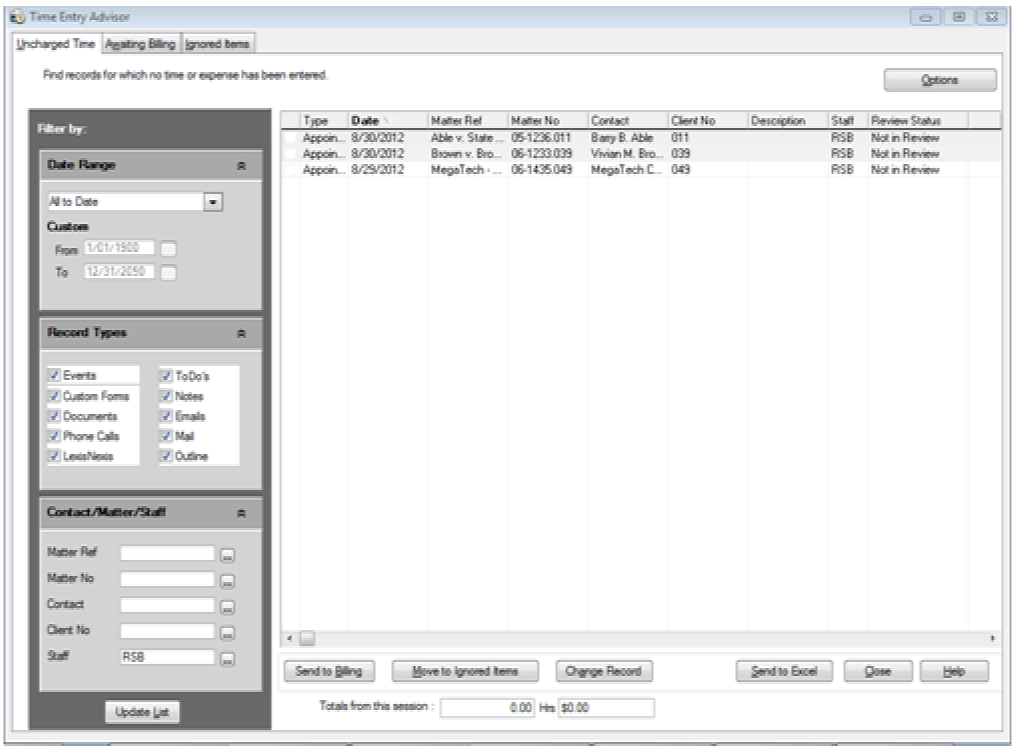
View uncharged time

The Uncharged Time tab of the Time Entry Advisor shows records that are marked as Billable, but have no corresponding billing record.

To view records representing uncharged time, do the following:

- On the **Billing** menu, click **Time Entry Advisor**.

The Time Entry Advisor window opens, displaying the Uncharged Time tab.



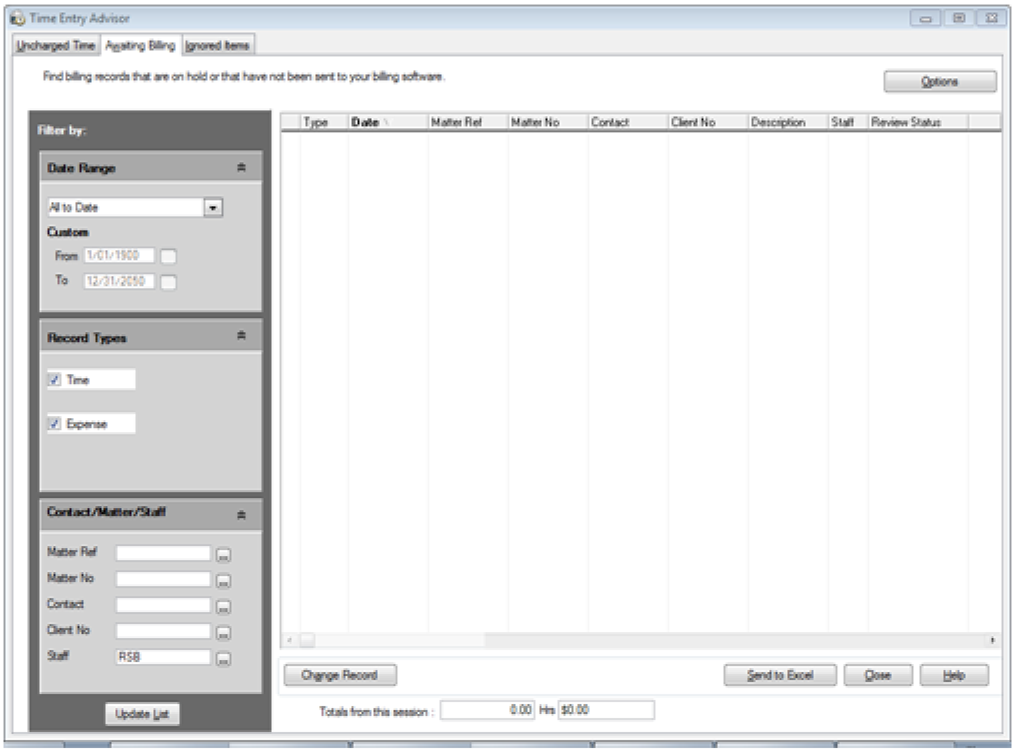
View records awaiting billing

The Awaiting Billing tab shows records for which BOTH of the following are true:

- The record has been sent to billing
- The **Hold Record** check box is selected on the record form

To view records awaiting billing:

1. On the **Billing** menu, click **Time Entry Advisor**.
2. The Time Entry Advisor window opens.
3. Click the **Awaiting Billing** tab.

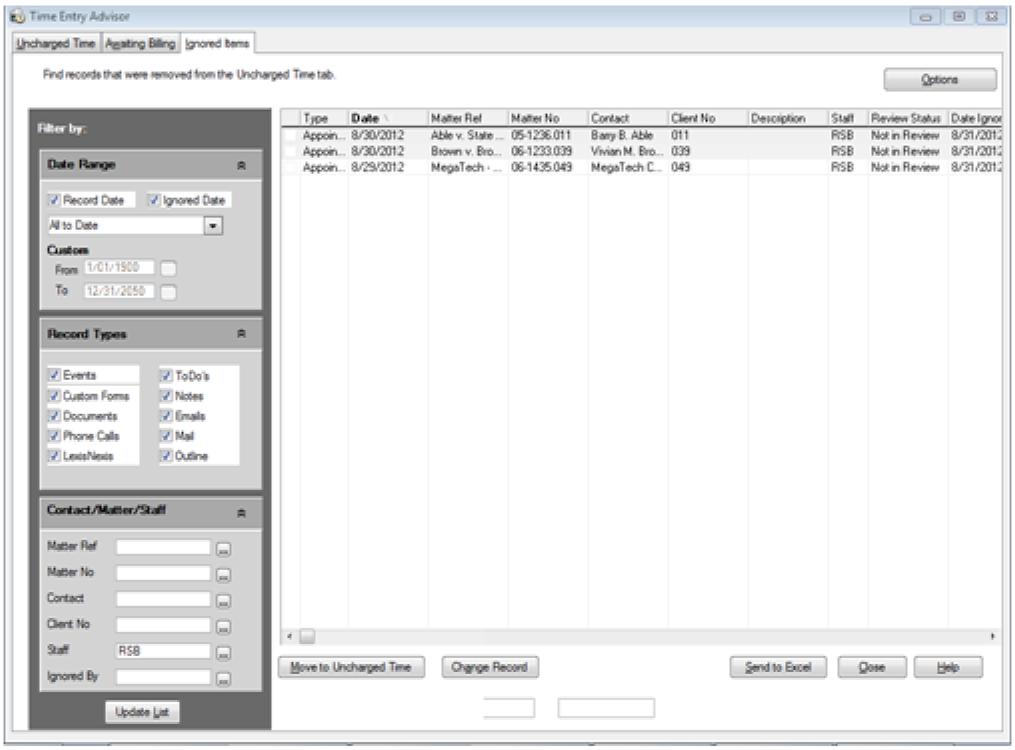


View ignored records

The Ignored Items tab of the Time Entry Advisor shows records that have been manually removed from the Uncharged Time tab.

To view ignored records:

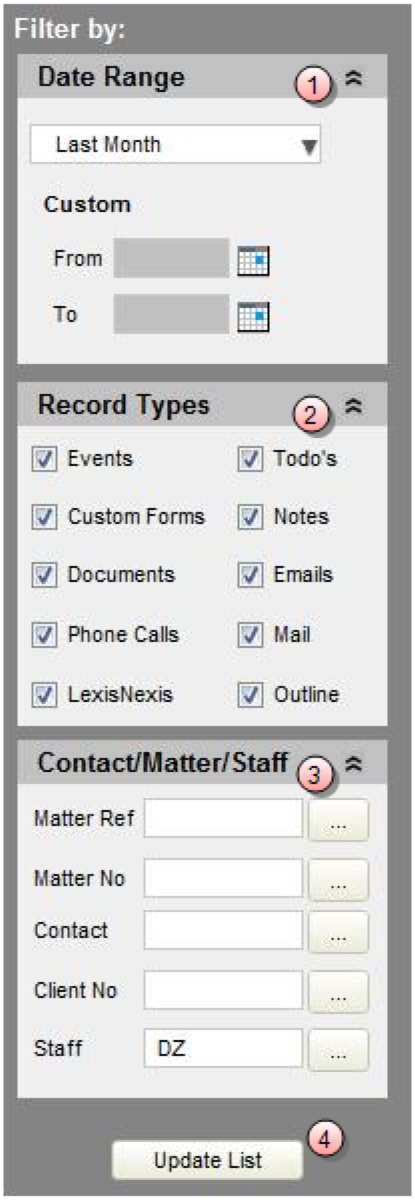
1. On the **Billing** menu, click **Time Entry Advisor**.
2. The Time Entry Advisor window opens.
3. Click the **Ignored Items** tab.



Other Time Entry Advisor tasks

Filter the list of records shown on the Uncharged Time tab

1. In the **Date Range** area, do one of the following:
   - Click the arrow and select a predefined date range (such as "Last Month") from the list.
   - Click the arrow and select **Custom** from the list. Type a start date in the **From** box and an end date in the **To** box. You can also click the calendar icon beside each box to select a date.



2. In the **Record Types** area, select the check box beside each record type you want to view on the list. Deselect the check boxes beside record types you want to hide.

3. In the **Contact/Matter/Staff** area, do the following:
    a. To view records for a specific Matter, type part or all of the Matter name in the **Matter Ref** box, or type part or all of the Matter number in the **Matter No** box. You can also click the lookup button beside either box to select from a list of Matters.
    b. To view records for a specific Contact, type part or all of the Contact name in the **Contact** box, or type part or all of the Client number in the **Client No** box. You can also click the lookup button beside either box to select from a list of Contacts.
    c. To view records for a specific Staff, type the Staff's initials in the **Staff** box. You can also click the lookup button to select from a list of Staff.

        Note: To view items with no Staff assigned to them, leave the **Staff** box empty.
4. Click the **Update List** button to filter the list by the selected criteria.

Change records on the Time Entry Advisor

1. Select the check box beside each record you want to change.
2. Click the **Change Records** button.
3. The Time Matters Change Express window opens.
4. Create a new template or use an existing one. Follow the instructions on the screen to apply changes to the selected records.

Send records to Microsoft Excel

To create a Microsoft Excel spreadsheet showing information on the Uncharged Time tab, do one of the following:

- To include all records shown on the tab, click the **Send to Excel** button.
- To include specific records, select the check box beside each record you want to include, and then click the **Send to Excel** button.

View uncharged time for a specific Matter or Contact

- Right-click a Matter on the Matter list, or a Contact on the Contact list. On the shortcut menu, select **Time Entry Advisor**.

The Time Entry Advisor window opens, displaying records related to the selected Matter or Contact on the Uncharged Time tab.

Bill uncharged time discovered by the Time Entry Advisor

1. On the **Billing** menu, click **Time Entry Advisor**.
2. The Time Entry Advisor window opens, displaying the Uncharged Time tab.
3. Optionally, enter criteria in the **Filter by** area and click **Update List** to show only records that match your criteria.
4. Select the check box beside each record you want to bill.
5. Click the **Send to Billing** button.
6. If multiple records were selected, select either the option to confirm each record before billing or the option to process all the selected records without confirmation. Click **OK**.

Time Matters for Microsoft Office

Overview of Time Matters for Microsoft Outlook

Time Matters for Microsoft Outlook gives you access to information about your Time Matters Contacts and Matters while you work in Outlook.

When this feature is enabled, the Time Matters pane appears on the right side of the Outlook window. On the Time Matters pane, you can:

- View summary information about the Contacts and Matters related to an Outlook email or appointment
- Search for Contacts and Matters in your Time Matters database
- Open a full Contact or Matter form for editing
- Enter time and expenses
- Create a new email to send to a Contact

Overview of the Time Matters pane in Outlook

You can expand and collapse the Time Matters pane by clicking the arrow beside the pane's label: 

.

When collapsed, the Time Matters pane shows the following:

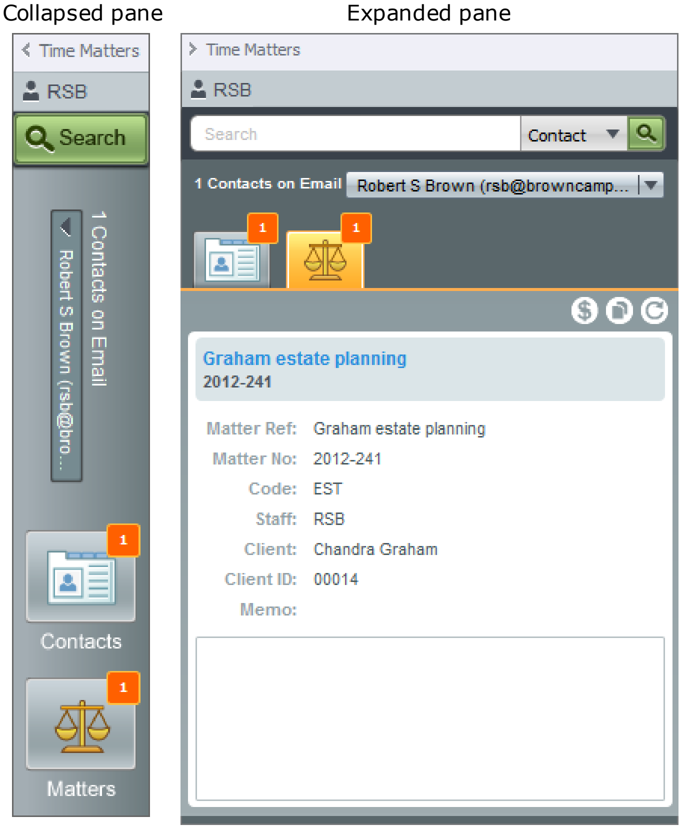
- The Time Matters login currently in use
- The currently selected Outlook contact (by default, the sender of the selected Outlook email or the organizer of the selected Outlook appointment)
- The number of Time Matters Contacts and Matters related to the selected Outlook Contact
- Buttons to show details of related Contacts and Matters

When expanded, the Time Matters pane shows the following:

- A Search box to find Time Matters Contacts and Matters
- Tabbed views of related Contacts and Matters
- Options to open the full Contact or Matter form, and to enter time or expense for a Contact or Matter

Collapsed pane

Expanded pane



Install Time Matters for Microsoft Outlook

Requirements

To use Time Matters for Microsoft Outlook, you must have the following:

- Microsoft Outlook 2007 with Service Pack 3, Microsoft Outlook 2010, or Microsoft Outlook 2013
- Microsoft Windows XP (32-bit only), Windows Vista, Windows 7, Windows 8, Windows Server 2003, Windows Server 2008 R1/R2, or Windows Server 2012

How to enable Time Matters for Microsoft Outlook

Time Matters for Microsoft Outlook might have been enabled during the installation of the Time Matters client. If it is enabled, the **TM for Outlook** tab on the Outlook ribbon will include a **Show/Hide Pane** button to hide or show the Time Matters pane.

If Time Matters for Microsoft Outlook is not already enabled on your computer, perform the steps in the following sections.

Enable the feature

1. In Time Matters, click the **File** menu, point to **Setup**, point to **General**, and click **Program Level**.

   The Program Level Setup window opens.

2. On the General tab, select the **Enable Web Access** check box.
3. Click **OK**.
4. Click the **File** menu, point to **Setup**, point to **General**, and click **Workstation Level**.

   The Workstation Level Setup window opens.

5. Click the **Additional Program Setup** button.

   The Additional Integration Setup window opens.

6. Select the **Time Matters for Microsoft Outlook** check box.
7. Click **OK**.
8. Click **OK** to close the Workstation Level Setup window.

If the Time Matters pane does not appear in Outlook

If all the requirements are met and you have enabled the feature in Time Matters, but the Time Matters pane still does not appear in Outlook, try the following:

- If the **TM for Outlook** tab appears on the Outlook ribbon, click the **Show Pane** button.
- Check your Outlook Add-Ins settings. "LexisNexis Time Matters for Outlook Add-In" should appear in the list of active add-ins. If it is listed as inactive or disabled, use Outlook's add-in management tools to make it active.
- Make sure that the LexisNexis Practice Management Common API service is installed and running on your computer.

Log in to Time Matters for Microsoft Outlook

1. Expand the Time Matters pane.
2. Enter your Time Matters user ID in the **User ID** box.
3. Enter your Time Matters password in the **Password** box.
4. Click the 

button.

View Contacts and Matters in Time Matters for Microsoft Outlook

Outlook Contacts versus Time Matters Contacts

Two different types of contacts are displayed on the Time Matters pane:

- Outlook Contacts are the persons or groups that appear in the header area of emails (the sender and recipients) or appointments (the organizer and attendees).
- Time Matters Contacts are a separate set of records, stored in your Time Matters database.

Typically, an Outlook Contact is related to only one Time Matters Contact. That Time Matters Contact, in turn, might be related to one or more Matters. So when you select an Outlook Contact on the Time Matters pane, it is typical to see one related Time Matters Contact and a small number of related Matters.

When you synchronize Time Matters with Microsoft Outlook, many of your Outlook Contacts are matched to Time Matters Contact records. When Contacts are matched, selecting the Outlook Contact will make its Time Matters Contact counterpart available to view, along with any Matters related to it.

Note

Only Contacts and Matters assigned to you are visible in Time Matters for Microsoft Outlook. This means that the Staff associated with your user ID must appear in the **Staff** box of the Contact or Matter record.

View Contacts and Matters

In Outlook, click an email or calendar appointment to highlight it.

The Time Matters pane displays the number of Outlook Contacts on the email or appointment. It also displays the number of Time Matters Contacts and Matters related to the active Outlook Contact (the one whose name is displayed).

You can change the active Outlook Contact by pointing to the arrow beside that Contact. A flyout window opens, displaying a list of all the Outlook Contacts on the email or appointment. Click a Contact to make it the active one. The related Time Matters Contacts and Matters will be updated.

When the Time Matters pane is collapsed

- Point to the Contact button to view a flyout window with a list of Time Matters Contacts related to the active Outlook Contact. Click a Time Matters Contact in the list to display details in the flyout window.
- Point to the Matter button to view a flyout window with a list of related Matters. Click a Matter in the list to display details in the flyout window.

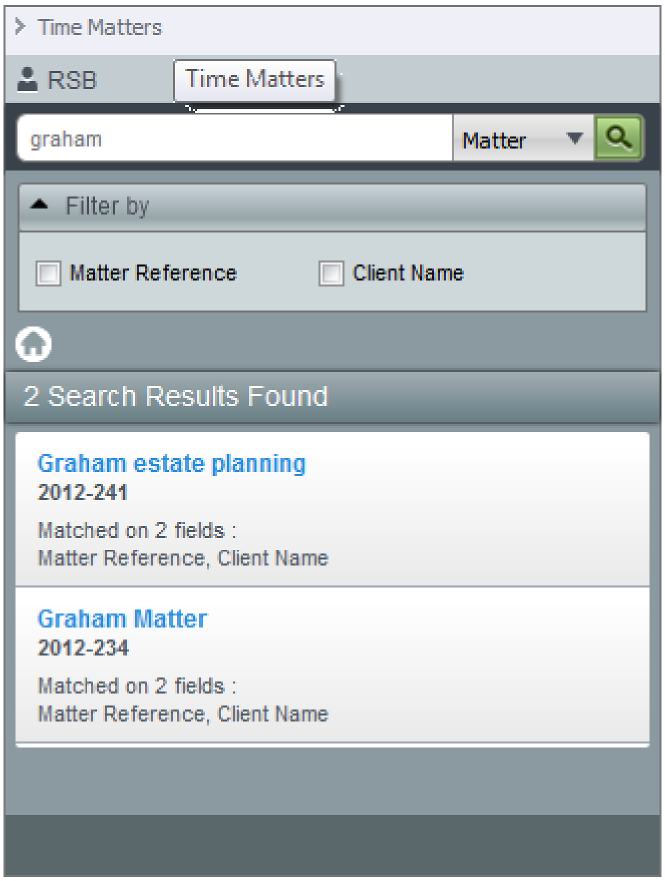
When the Time Matters pane is expanded

- Click the Contact tab to view a list of Time Matters Contacts related to the active Outlook Contact. Click a Time Matters Contact in the list to display details for that Contact.
- Click the Matter tab to view a list of related Matters. Click a Matter in the list to display details for that Matter.

Search for Contacts and Matters in Time Matters for Microsoft Outlook

1. Expand the Time Matters pane. (When the pane is collapsed, clicking the Search button will expand it.)
2. Click the arrow beside the **Search** box and select **Contact** or **Matter**.
3. Type a portion of the Contact Name or the Matter Reference in the **Search** box.
4. Press ENTER or click the  button.

A list of records matching the search text appears.



Note

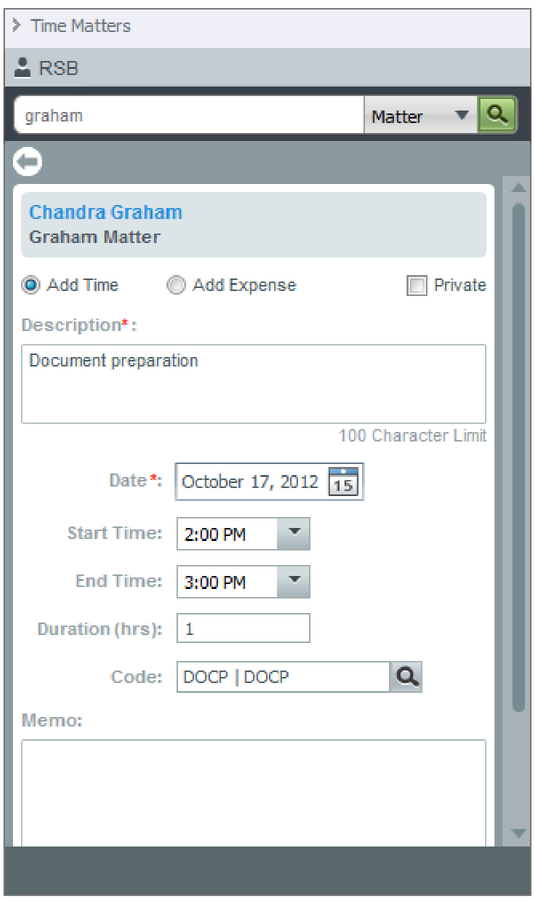
Only Contacts and Matters assigned to you are visible in Time Matters for Microsoft Outlook. This means that the Staff associated with your user ID must appear in the **Staff** box of the Contact or Matter record.

Enter time and expense using Time Matters for Microsoft Outlook

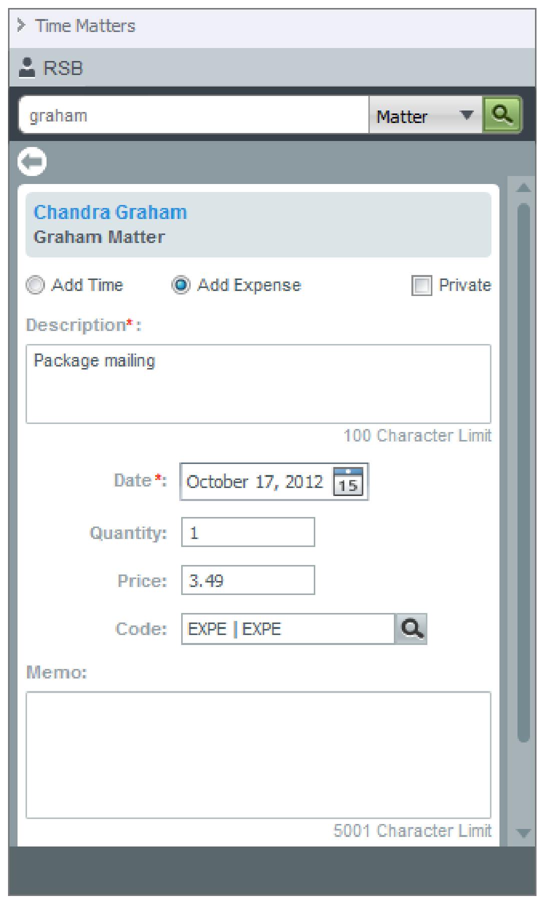
You can enter time and expenses for a Contact or Matter that you are viewing in Time Matters for Microsoft Outlook.

1. Expand the Time Matters pane.
2. Locate the Contact or Matter for which you want to enter time or expense. You can do this by selecting an email or appointment related to the Contact or Matter, or by using the Search feature to find the Contact or Matter.
3. Double-click the Contact or Matter to display its details.
4. Click the $ button to display the time/expense entry form.
5. At the top of the time/expense entry form, select **Add Time** or **Add Expense**.

Add Time



Add Expense



To add time, do the following:

a. In the **Description** box, enter a short description of the time entry.

b. Optionally, enter a different date in the **Date** box (the current date is used by default).

c. Enter a start time and end time in the respective boxes.

d. Enter a code in the **Code** box. You can click the button to select the code from a list.

e. Optionally, enter additional information about the time entry in the **Memo** box.

To add expense, do the following:

a. In the **Description** box, enter a short description of the expense entry.

b. Optionally, enter a different date in the **Date** box (the current date is used by default).

c. In the **Quantity** box, enter the number of expense units.

d. In the **Price** box, enter the price per unit.

e. Enter a code in the **Code** box. You can click the button to select the code from a list.

f. Optionally, enter additional information about the time entry in the **Memo** box.

6. If you want to mark the time or expense entry as Private, select the **Private** check box at the top of the time/expense entry form.

7. Click **Save**.

