Bet You Didn’t Know Time Matters Could Do That!

40 Tips in 40 Minutes

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Setup: Program, User, Workstation
Program-Level Settings

![Program Level Setup window](image)

- **Default Program Version**
  - Program Series: [Dropdown]
  - Property File: [Dropdown]
  - Matter Label: [Dropdown]
  - Country: [Dropdown]

- **Archiving**
  - Archive reminder when # of records reaches: [Dropdown]
  - Batch Archive # of days before today: [Dropdown]

- **Application Update**
  - Check for new version: [Dropdown]
  - Enable Local Area Network update: [Checkbox]

- **Notification**
  - Enable Backup Warning: [Checkbox]
  - Warn every [Dropdown]

- **Mobile and Outlook Data Access**
  - Enable Web Access: [Checkbox]

[Options: Defaults, OK, Cancel]
User-Level Settings

[Image of User-Level Setup window]

- **Opening Defaults**
  - Default opening window: Calendar Only
  - Show Alerts and Reminders screen after login
  - Show if there are no Alerts and Reminders
  - Automatically load and open the Day File
  - Show Tip of the Day after login
  - Start as maximized

- **General Defaults**
  - Default entry for Date Calculator
  - User can skip Network Update

- **Wizard Defaults**
  - Use Wizard for editing: Staff, Contact, Class Code, Notes, Quick Tab, Billing Preferences
  - Other Wizards: Archive Related Records, Record Review, Security
Workstation-Level Settings
Toolbars, Columns, Sorting

- These affect only your Time Matters UserID
- Right-click main Toolbar and choose Customize
- Click a column heading to hot-sort
Customize Main Toolbar
Add/Remove Columns
## Hot-Sort a List

<table>
<thead>
<tr>
<th>Last</th>
<th>First</th>
<th>Client No</th>
<th>Code</th>
<th>Firm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Molina</td>
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<td>U25</td>
<td>CLNT</td>
<td></td>
</tr>
<tr>
<td>Gellken</td>
<td>Richard</td>
<td>COCL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anderson</td>
<td>Robin Adams</td>
<td>OPCL</td>
<td>Anderson Law Office</td>
<td></td>
</tr>
<tr>
<td>Smith</td>
<td>Roger</td>
<td>031</td>
<td>CLNT</td>
<td></td>
</tr>
<tr>
<td>Shah</td>
<td>Fulya</td>
<td>WTNS</td>
<td></td>
<td>Shah Unlimited</td>
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<tr>
<td>Green</td>
<td>Sally</td>
<td>044</td>
<td>CLNT</td>
<td></td>
</tr>
<tr>
<td>Branch</td>
<td>Samuel</td>
<td>032</td>
<td>CLNT</td>
<td></td>
</tr>
<tr>
<td>Locion</td>
<td>Sarah</td>
<td>015</td>
<td>CLNT</td>
<td></td>
</tr>
<tr>
<td>Abrams</td>
<td>Soul</td>
<td>DEF</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Garnory</td>
<td>Sharon</td>
<td>017</td>
<td>CLNT</td>
<td>Better Wardrobe Ltd</td>
</tr>
<tr>
<td>Olson</td>
<td>Sherman</td>
<td>JUD</td>
<td>NY Federal Bank</td>
<td></td>
</tr>
<tr>
<td>Wroblo</td>
<td>Sophia</td>
<td>034</td>
<td>CLNT</td>
<td></td>
</tr>
<tr>
<td>Cotwill</td>
<td>Susan</td>
<td>JUD</td>
<td>Broward Circuit Court</td>
<td></td>
</tr>
<tr>
<td>Cooper</td>
<td>Susie</td>
<td>TRAV</td>
<td>ACME Travel</td>
<td></td>
</tr>
<tr>
<td>Freedman</td>
<td>Tom</td>
<td>U70</td>
<td>EXPL USA</td>
<td>Southridge Medical</td>
</tr>
<tr>
<td>Roland</td>
<td>Theodore</td>
<td>047</td>
<td>CLNT</td>
<td></td>
</tr>
<tr>
<td>Boker</td>
<td>Thelius</td>
<td>037</td>
<td>CLNT</td>
<td>Fuegoq Varina Corp</td>
</tr>
<tr>
<td>Sharp</td>
<td>Tommy</td>
<td>029</td>
<td>CLNT</td>
<td>General Properties</td>
</tr>
<tr>
<td>Brown</td>
<td>Vivian</td>
<td>038</td>
<td>CLNT, FLA</td>
<td></td>
</tr>
<tr>
<td>Fleece</td>
<td>Walter</td>
<td>OPCL</td>
<td>Law Offices of Walt</td>
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<tr>
<td>Sufcon</td>
<td>Walter</td>
<td>EXPT</td>
<td>Alland Consulting,</td>
<td></td>
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<tr>
<td>Frelick</td>
<td>Warren</td>
<td>JUD</td>
<td>Palm Beach Circuit</td>
<td></td>
</tr>
<tr>
<td>Allen</td>
<td>Wayne</td>
<td>035</td>
<td>CLNT</td>
<td></td>
</tr>
<tr>
<td>Costanzo</td>
<td>William</td>
<td>OPCL</td>
<td>Boulder, James &amp; E</td>
<td></td>
</tr>
<tr>
<td>Alcoft</td>
<td>Villers</td>
<td>EXPT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turbodyne</td>
<td>Williams</td>
<td>033</td>
<td>CLNT</td>
<td>DPA Software</td>
</tr>
</tbody>
</table>
Quickly Tag or Untag a List

• Ctrl+T to tag all
• Ctrl+U to untag all
• Shft+T to tag current record
• Shft+U to untag current
• Right-click / Tag record / Tag all records
Send to Excel

- Create a QuickTab or filtered list
- Search/tag desired records
- Click “Send to Excel” icon or press Ctrl+E
Time Matters Journals

- Personal Journal – all records for default staff for Today (Ctrl+J)
- Matter Journal – all records for designated matter; defaults to Today (Shft+F6)
- Contact Journal – all records for designated contact; defaults to Today (Shft+F5)
- Access via Calendar menu
Personal Journal

Calendar - Friday, Apr 19, 2013
- 11:00am Deposition
- 1:30pm Meet with Jeremy Bard - investigator
- 7:28pm Bar Centennial Celebration

Email (0) TM

Notes (1)
- 4/19/2013 7:28pm Bar Centennial Celebration

Messages (4) TM
- 10/07/2013 2:04am Judge Simon returned your
- 10/04/2013 9:08am Sign Contract
- 10/03/2013 8:41pm Are you available for lunch
- 10/02/2013 6:42pm Photocopies are ready

Phone Calls (0)
Matter Journal
Contact Journal
Time Matters Recycle Bin

- Time Matters has its own Recycle Bin for TM records, much like Windows has a bin for files.
- File / Recycle Bin
- Can undelete records which have been deleted, as long as they have not been emptied from the Recycle Bin
Time Matters Recycle Bin

- Contact Records
  - Castron, William - DPCL - DBH - Fleury v. Fleury
- Mail Records
  - 1/28/2013 - Client Wrap-up Letter & DocsCLNT
- LexisNexis Records
  - 4/18/2013 - FindLaw Legal Research SiteLGR

- Date Deleted
  - 4/19/2013 1:11AM
Keyboard Shortcuts

• Function keys – e.g. F2 is almost always “Lookup”
• Date and time entry shortcuts, e.g. “T” for Today in the main Date field
• Refer to online help screen called “Hot Keys and Shortcuts”
# Function Keys

<table>
<thead>
<tr>
<th>To open this list type...</th>
<th>...press this Hot Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event</td>
<td>F3</td>
</tr>
<tr>
<td>ToDo</td>
<td>F4</td>
</tr>
<tr>
<td>Contact</td>
<td>F5</td>
</tr>
<tr>
<td>Matter</td>
<td>F6</td>
</tr>
<tr>
<td>Note</td>
<td>F7</td>
</tr>
<tr>
<td>Phone</td>
<td>F8</td>
</tr>
<tr>
<td>Document</td>
<td>F9</td>
</tr>
<tr>
<td>Email</td>
<td>F11</td>
</tr>
<tr>
<td>Personal Inbox</td>
<td>CTRL+I</td>
</tr>
<tr>
<td>Billing</td>
<td>F12</td>
</tr>
<tr>
<td>Invoice</td>
<td>ALT+F12</td>
</tr>
<tr>
<td>Review List</td>
<td>ALT+SHIFT+R</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>To open this feature...</th>
<th>...press this Hot Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily Calendar</td>
<td>CTRL+F3</td>
</tr>
<tr>
<td>Weekly Calendar</td>
<td>ALT+F3</td>
</tr>
<tr>
<td>Personal Journal</td>
<td>CTRL+J</td>
</tr>
<tr>
<td>Contact Journal</td>
<td>SHIFT+F5</td>
</tr>
<tr>
<td>Matter Journal</td>
<td>SHIFT+F6</td>
</tr>
<tr>
<td>Reference Calendar</td>
<td>ALT+F2</td>
</tr>
</tbody>
</table>
Date and Time Entry

- Date: 4/23/2013
- Time: 9:30am - 11:00am
- Description: Meeting with client
- Regarding: Able v. State of Florida
Use Record Types Creatively

• Matters do not have to be client matters; they can be projects such as Firm/Staff Development, Firm/Holiday Party, Firm/Prospective Employees, etc.

• Contacts do not have to be people or companies; they can be ideas, software programs. The idea is to create a repository for related information.
User-Defined Record Types

• Create additional record types (name-based or date-based) of your own.
Inheritance

• To automatically populate the Regarding fields, click on a contact or matter before creating a new related record.
Save and Take Action

- We all use Save/Close when finished editing a record, but don’t forget its alternatives.
Quickly Search an Entire List

- If you don’t have the search field on the list toolbar, you can accomplish the same thing using Ctrl+F.
Global Search (Conflict Check)

Don’t forget to also use the “record review” feature to initiate the “mental” part of the conflict check.
Time Matters RSS Reader
Disable Data Entry Wizards
Matter Area View Options
Free Martindale Lookup of Contact

Name: Robin Adams Anderson
Office: Cary, North Carolina (Wake Co.)
Peer Review Rating: AV® Preeminent 5.0 out of 5

☑ Peer Review Rated Documents

Compare
Access CourtLink Subscription

<table>
<thead>
<tr>
<th>MatterNo</th>
<th>Plaintiff</th>
<th>Court</th>
<th>Case Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>05-1235.011</td>
<td>Billy Abe</td>
<td>Superior Court</td>
<td>Civil</td>
</tr>
</tbody>
</table>

Docket Number: 

- Description: Struck broadside by a state vehicle.
- Location: 195 and Forest Hill Boulevard.
- Client: Struck broadside by a Department of Transportation truck. We believe the driver of their vehicle was driving under the influence. The client was badly injured. Liability is a given, damages should be easy to prove. The only real outstanding issues are sovereign immunity and whether we will be able to hit the state for punitive damages.
Merge Without Doc Record
Formattable Clipboards

• Extremely powerful way to harness Windows clipboard capability to capture specific fields from selected records to paste into documents, emails, etc.

• Test with the Clipboards that come with TM. Then modify those or try creating some of your own.

• File / Setup / Templates / Formattable Clipboard
Time Matters Insider

- Extremely powerful way to harness Windows clipboard capability to capture specific fields from selected records to paste into documents, emails, etc.
- Test with the Clipboards that come with TM. Then modify those or try creating some of your own.
- File / Setup / Templates / Formattable Clipboard
Document Auto-Naming
Print Reports to PDF without Adobe

Filters Used
5 Tagged Records
CALENDAR
Change Default Daily View
Drag to Move Event on Daily View

<table>
<thead>
<tr>
<th>Events</th>
<th>Monday, April 15</th>
<th>Tuesday, April 16</th>
<th>Wednesday, April 17</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 pm</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3:00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4:00</td>
<td></td>
<td></td>
<td>Staff Meeting</td>
</tr>
<tr>
<td>5:00</td>
<td>Signing of Irrevocable Trust Documents</td>
<td>Signing of Irrevocable Trust Documents</td>
<td></td>
</tr>
</tbody>
</table>
Scrolling in Calendar Views

<table>
<thead>
<tr>
<th>Monday, April 15, 2013</th>
<th>4:30pm Closing of Irreconcilable Trust Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday, April 17, 2013</td>
<td>9:00am Meeting: Head of Automation Assistance</td>
</tr>
<tr>
<td>Friday, April 19, 2013</td>
<td>11:00 am Deposition Re: Abstracted Structure</td>
</tr>
<tr>
<td></td>
<td>1:00pm Meet with Jeremy Rands - Investigation Activity State of Florida</td>
</tr>
</tbody>
</table>

Fri, May 10, 2013
Date Calculator
Monthly Calendar Zoom
Printing Calendars
Calendar Staff Selector

Set Number of Days Displayed When Tab is Selected

<table>
<thead>
<tr>
<th>Tab 1</th>
<th>Tab 2</th>
<th>Tab 3</th>
<th>Tab 4</th>
<th>Tab 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>1</td>
<td>5</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Note: Set Number of Days to "0" to NOT show the Tab on the Calendar

Show:
- Toolbar
- Hide Records
- Group Members (Expanded Mode)
- Title Bar

Staff Section:
- Show Colors for selected Staff
- Show which Staff:
  - All Staff
  - Selected Staff
- Display Format:
  - Show Initials then Names
  - Show Names then Initials

Specify the character that will separate fields:

OK Cancel

EASTERN LEGAL SYSTEMS, LLC
Quick Alarms
COMMUNICATION
Messenger – Show Read/Unread
Use Messenger as “Envelope”
“TM Save” from Windows Explorer using right-click / Send To
Drag & Drop Doc to Matter or Contact
Save Sent Outlook Email to TM
Save Web Pages to TM

Law Firm Practice Management

Time Matters® Client, Case, and Document Management System

Optimize your firm’s efficiencies, client service levels...
NEW IN VERSION 12
Time Entry Advisor
Automatic TMSave IN MS Office
Time Matters for Outlook

- Search for contact and create Outlook email, all without necessarily having TM open.
- View TM contacts and matters directly from Outlook.
- Click on an email message in Outlook and view the TM matter info.
New Outlook Integration

- Save Outlook emails as either TM email records (connect as email) or as Outlook .msg files (connect as document).
New Outlook Integration

- New options for saving Outlook attachments to TM.
Thank you for attending!

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Questions?