Introducing **Time Matters**® version 10.0

UPGRADE **to Time Matters 10.0 software for:**

- **Increased firm productivity and profitability**
- **Improved performance and reliability**
- **Enhanced accessibility**
- **Better data protection**

Time Matters users can upgrade by ordering an **Annual Maintenance Plan** which includes access to version 10.0 (once available), updates and new version releases during the annual plan period, access to Anytime Training for Time Matters and telephonic support.

Time Matters version 10.0
# New Features & Enhancements Overview

1 **Enjoy increased performance and stability** with enterprise class Time Matters powered by SQL, which provides:

- Enhanced performance for data-intensive firms, including improved document and e-mail handling – especially important for firms going "paperless" due to higher electronic data requirements and larger data repositories

- Increased searching speeds to quickly locate documents and check conflicts

- Improved integration with third-party application including Outlook® and your PDAs via Microsoft® Exchange

- Simplified installation that includes Microsoft® SQL Server® Express

- Greater flexibility and increased integration through Time Matters® Enterprise technical capabilities (now available to all Time Matters version 10.0 customers):

  › Synchronization with Microsoft® Exchange Server

  › Integrations with Document Management Systems (DOCS Open, iManage®, and WORLDOX)

  › Extend your productivity by integrating your other business applications with TM API
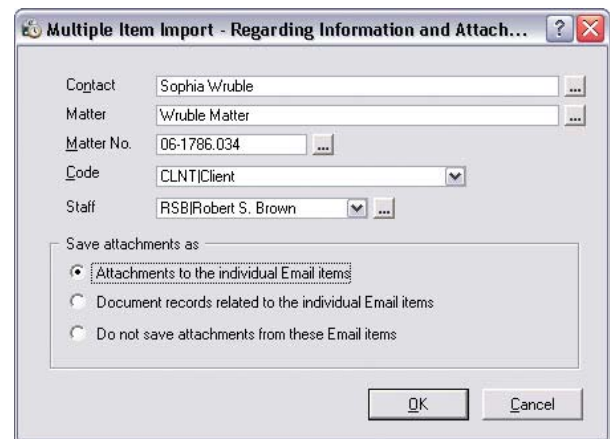
2 **Quickly and easily manage email** with improved Time Matters Connect Email for mass association of multiple Outlook® emails. Now, set Staff and Codes fields in addition to Contact, Matter, and Matter No. fields.

3 **Enjoy greater mobility** provided through integration with Microsoft Exchange Server†, including access to Time Matters via Blackberry®†, iPhone, Palm, Windows Mobile.

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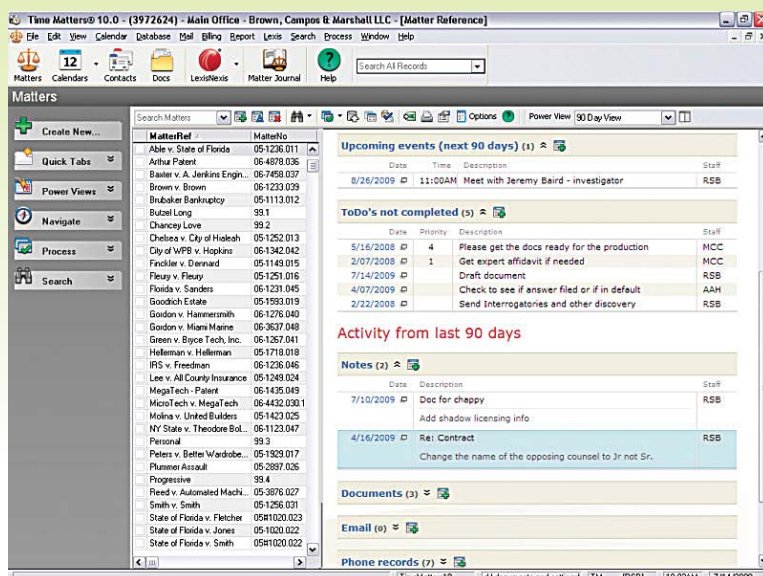
4 **Enhanced accessibility** makes it easy to view all the current related information about a case in one view. The enhanced Power View with increased SQL performance allows you to see and link to related contacts, events, ToDo's, notes, documents, e-mail, phone records and research.

5 **Reduce your risk and secure your data** with improved backup and restore functionality.

6 **Increase efficiency** by organizing merge template folders to match your personal or firm document categories.

7 **Intuitively improve firm-wide practice management with Time Matters desktop extensions.**

Managing your practice just got easier! With the new desktop extensions, you can get everyone in your firm operating more efficiently without even opening Time Matters.

8 **Upgrade Services Available**

Get your firm up and running faster with our LexisNexis® Certified Independent Consultants (CIC)! CICs are dedicated to the highest level of consulting and support for LexisNexis® Practice Management solutions, and can help fine tune your workflow for even greater efficiency.

For faster, hassle-free upgrade implementation, software customization or firm-specific training, consulting and support for LexisNexis Practice Management products, contact a Certified Independent Consultant in your area by visiting law.lexisnexis.com/spn/findcic, or ask your Practice Management Specialist for a referral.
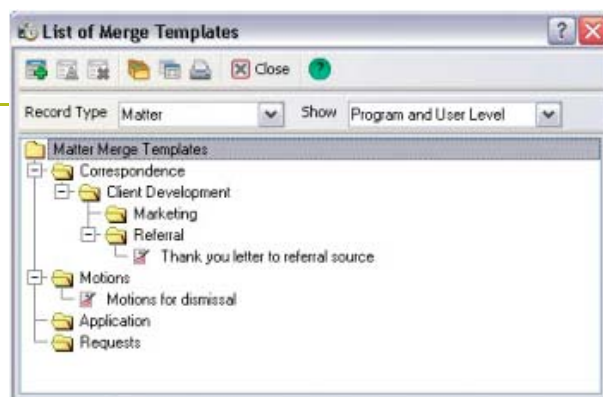
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Time Matters version 9 Features

⊕ **User Defined Record Types –** Five new user-defined record types enable you to track what interests yourfirm. For example, you can create an Assets record type to manage your firm's assets or a Damages recordtype to collect and maintain information about damages collected, as well as those outstanding after you've won your case.

⊕ **List Task Panel –** New Task Panel makes it easy to work with your records, navigate between record types and complete work more quickly.

⊕ **New Wizards –** Seven new wizards help you set up complex, powerful functions by walking you through basic setup: Staff Setup, User Setup, Security Profile Setup, Class Code Setup, Email Setup, Quick Tab Setup and Record Review.

⊕ **Toolbars –** Ability to display multiple main toolbars simultaneously enables you to set up and then show both your matter management and billing toolbars at the same time.

⊕ **Improved Power Views –** Power Views have been redesigned for the first time since they were introduced in Time Matters 5. The new graphics and enhanced features add greatly to the professional feel of the program.

⊕ **Updated User Interface –** overall graphical look now better utilizes the underlying graphical elements of the Windows OS. For example, Front Office is now less affected by and plays better with themes, taking on a different look depending on the OS settings.

⊕ **Sub-List Improvements –** Ability to right-click to mark items as "Done" from Related Records sublists makes it easier than ever to get a centralized view of where a case, matter or contact stands.

⊕ **Assignment Capacity –** Capacity for up to 100 staff members applies to Calendar, Events and all forms (up from a previous maximum capacity of six).

⊕ **Enhanced Archiving Process –** Includes prompts about whether you wish to archive any supporting daterelated record types. This simplifies and centralizes administration of your records. Prompts warn you about incomplete items and allow you to opt them out of the archive or cancel the archive process altogether.

⊕ **Enhanced Triggers –** Better automation with enhanced Triggers enables field-level conditions to allow context-sensitive activities: When a field changes from blank, when field text is changed, or when a record is added, a field gets populated. For example, you can now automatically send a message to your file clerk to close a file if the "close file" date is completed. Or you can prompt your staff to begin your client intake process when a contact class code changes from "prospect" to "client."

⊕ **Exchange Server Synchronization –** Re-engineered Microsoft Exchange server synchronization uses WebDAV technology and enables your firm to:

- Run synchronization as a service
- Run synchronization service on a machine other than the Exchange Server
- Synchronize with more than one Exchange Server (for firms that have users distributed across multiple servers)
- Synchronize contacts to Outlook contact folders

⊕ **Email –** improvements to the creation and management of email:

- Several issued address with the MAPI integration and HTML editing portions of the internal email component
- Batch save multiple email items in Microsoft Outlook to Time Matters
- Configuration to automatically store email attachments outside of the Time Matters database
- Utility to move legacy email attachments from a file system to the Time Matters database, or from the database to a file system

Time Matters version 9 Features

- **Improved CaseMap® Link –** Enables you to send multiple case/matter records and research results to CaseMap 7.5 case analysis software. This can make it even easier to work with larger volumes of data with less effort and lower risk of errors and oversights. Select multiple records at one time—for example, all the contacts or key documents affiliated with a particular case—and send them to CaseMap at one time.

- **Enhanced Security Profiles –** Five new default security profiles—Administrator, Billing Administrator, General User, Power User and Temporary Staff—are available on install, making it easier to put security and privacy in place for your firm's data. Security profiles now have an "exceptions" tab available for more finely tuned control over access to your data.

- **Improved Documentation –** Help guide converted to a single interactive format making it more robust, and able to receive ongoing updates.

- **Navigators –** New navigators have been added including a TM Training & Support Navigator, background colors can now be set for navigators and additional images were added for the Custom images feature, and to match the images for the User Defined Record icons.

- **Datalink –** The Datalink no longer requires a purchased Datalink licenses for the end users (developers still have to become part of the Developers Network).

- **Availability / Installation –** Both Professional and Enterprise editions are available via download.

- **Global/Conflict of Interest Search –** Updated, more powerful search tool that runs off a data index helps you conduct effective and fast Conflict of Interest and Global searches. A new search field – Search Entry – can also be added to the toolbar for immediate access to searching.

- **Updated Contact, Matter and Personal Journals –** Contact and Matter Journals let you show related Contacts or Matters; personal Journal now offers Class Code filters for Contacts and Matters to let you further customize your view of what you monitor – it also shows only items in review that are still incomplete.

- **Extended Auto-Complete –** Auto-Complete from the Contact and Matter Regarding line is now available for Search, Billing and Reports to make it faster and easier to search and filter. Minimize mistakes and see the results you were looking for.

- **Calendars –** Calendars have been redesigned to streamline them and make them cleaner looking. Additional additions and revisions were made to the reference calendar/date calculator, staff and supporting record selections and scheduler.

- **Document Searching –** The dtSearch engine was updated to version 7, which among other things brought the index limit to 1 terabyte, and made possible the row-level indexing of the Front Office database.

- **Improved Integration with Juris and PCLaw** – Several new features and enhancements have been made to tighten the integration and performance when linking Time Matters to the Juris or PCLaw billing and accounting applications. Additional configuration options reduce the requirement to install the complete PCLaw application on every client workstation.

Time Matters version 8 Features

⊕ **Automatic Updates –** New Automatic update options ensure that your Time Matters program is always on the latest service releases.

⊕ **AutoTXT Speeds Common Functions –** Save Keystrokes and set standards with new AutoTXT functionality. Insert words or complete paragraphs with a few keystrokes using the new AutoTXT functionality available from all Time Matters records. Ensure standard wording and minimize typing errors on firm records, invoices and documents by implementing Program Level AutoTXT codes for the most commonly used document text and firm activities.

⊕ **Calendar Conflict Notification –** New calendaring conflict functionality allows you to run conflict checks on repeating events, select to view details of conflicting calendar entries for individual staff and display conflicting record information.

⊕ **CaseMap Integration –** Send Matter, Contact and other record information over to LexisNexis CaseMap to help organize case data.

⊕ **Custom Client/Contact Numbers –** Organize your firm's data with Contact/Client Numbers. Time Matters 8.0 allows you to assign both unique client and Matter numbers for easy reporting and organization of your Contacts and Cases. Produce reports and filter records grouped by Client or Matter. Client numbering can be masked using a variety of automated formats to relate Contacts and Matters.

⊕ **Custom Printer Assignments –** Let your printer do the thinking! Save the time you would've spent loading and reloading paper trays by assigning Microsoft Windows printer trays to make document, invoice and check generation effortless.

⊕ **Customizable Lookup Lists –** Customize lookup lists for Time Matters records to make searching easy! Set columns and information to your preferences making data mining simple.

⊕ **Email Documents as a PDF –** While it has always been easy to email a document stored in Time Matters; it is now just as easy to convert that document to a PDF before sending it. Because most legal documents are emailed in PDF format, this is a significant time savings for Time Matters users.

⊕ **Enhanced Outlook Integration –** A number of new enhancements provides deeper and richer integration with Microsoft Outlook. Regarding information from Time Matters can be displayed when you highlight a Contact, Task or Email in Outlook. Also, Outlook users can be prompted to save to Time Matters when sending an email, saving an appointment, task or Contact in Outlook. The TM Connect functionality that allows users to save email from Outlook to Time Matters now automatically saves attachments as document records.

⊕ **Flexible Print Options –** Let your printer do the thinking! Save the time you would've spent loading and reloading paper trays by assigning Microsoft Windows printer trays. Dedicate one printer or drawer for labels, one for letterhead and one for invoices never changing paper between printing runs again.

⊕ **Inactive Staff and Classification Code options –** Now you can set former employees' staff codes as inactive in Time Matters to eliminate long drop down lists yet maintain vital historical data. Classification codes can also be set to inactive status to eliminate and clean up firm classification options.

⊕ **Net Documents Integration –** Time Matters 8.0 introduces new integration with Net Documents to allow users to access documents stored in the Net Documents database from Time Matters.

Time Matters version 8 Features

⊕ **PDA & Smartphone Integration –** Take Mobility to the next level with the latest PDA & Smartphone technology. Time Matters offers synchronization support for Windows Smartphone and Windows Mobil 5 devices. Synchronize your Contacts, Calendar and more from your PDA and mobile devices directly to Time Matters. Synchronization support is also available for devices using Blackberry Handheld Devices and PDAs using Palm Operating Systems

⊕ **Power View Enhancements –** New Power View functionality includes the ability to search from Power Views as well as insert clipboard data into Power Views.

⊕ **Powerful Integrations –** Integrate with critical applications that help you manage your practice. Time Matters 8.0 further expands integration capability with support for Shepard's CheckCite, CaseMap, Firefox, Worldox, iManage, DocsOpen, Adobe Acrobat Reader and more. Additionally, Time Matters 8.0 includes an even tighter integration with Microsoft Applications including Outlook, which prompts users to save emails and attachments. Calendar appointments and tasks created in Microsoft Outlook can synchronize to case and contact records in Time Matters, ensuring all case information is saved. Users can now effortlessly create PDF documents from Time Matters' Document list and Lexis research and subsequently email these documents as PDFs. New integration with Adobe Acrobat reader lets you save PDF files to Time Matters as a document from a new TM Save toolbar. Enhanced Windows integration allows you to send documents to Time Matters instantly using a new right click option.

⊕ **Recycle Bin Enhancements –** The recycle bin can now be sorted and emptied by date or record types. Additionally, users can tag records and delete or restore from the process menu.

⊕ **Save Invoices as Documents –** A single click now allows you to save invoices as documents associated with a Client or Matter.

⊕ **Scanning Default Settings –** Now users can set default file types for scanned documents to meet their personal preferences.

⊕ **Strong Password Support & Security Enhancements –** Time Matters 8.0 includes strong password supportto enhance your firm's security. Password formats can be set to require alphanumeric characters and specific lengths. Program level settings allow you to lock users out after 5 incorrect attempts. Additionally, an Administrative security setting has been added that allows an administrator to lock users out during maintenance and prevents others from changing security settings.

⊕ **TM Connect –** For firms who want or need to use Microsoft Outlook, TM Connect provides integration between Outlook and Time Matters. Users can use TM Connect from Outlook to create and associate Time Matters Email, Contact, Events, and ToDo Records.

⊕ **TM Toolbar for Firefox and Acrobat –** TM Save and TM Open functions are now available for both the Firefox web browser and Adobe Acrobat Reader. Save your web research directly from Firefox to Time Matters or send a PDF from both Adobe Acrobat and Adobe Reader to Time Matters.

⊕ **Windows Right-Click sends to Time Matters –** Now right-clicking on any document on a Windows PC will present a menu option to send that document to Time Matters. This new and easy connection is one more way to save time and energy while managing your practice.

⊕ **Windows Vista Support** – Time Matters supports the Windows Vista operating system (Business, Ultimate and Enterprise Editions).

Time Matters version 7 Features

⊕ **Calendar Enhancements –** The Calendars have been updated to rival the top consumer products. For example, if Events are scheduled for the same date and time, they are now optionally displayed side-byside. Also, if you need to extend the duration of a calendar event, just use your mouse to drag to the specified time. Events now have better color coding by Staff person, and more.

⊕ **Multi-day Scheduling –** Use this feature to simplify scheduling multi-day events such as a Trial, or an out-oftown trip. This feature is similar to a recurring event and allows users to set the start and end dates. When completed, Time Matters will automatically populate your calendar as specified.

⊕ **Customizable Workflow Navigators –** Make Time Matters much easier to use. Create fully-customized Navigators to define your workflow, dramatically simplifying how you and your staff use Time Matters.

⊕ **Client and Matter Monitor –** Monitor activity on your Contacts and/or Matters. You can be notified when assigned Contacts and/or Matters have activity such as other staff adding, changing or deleting records for your client like phone calls, documents, email, and more. Examples of how this will help you manage your Contacts and/or Matters.

- For Clients with high profiles, anytime a user opens a record, they can be notified with a message like, "Treat this client with care and address him as Mr. Wiley."
- You can be notified and track specified documents that are created or scanned into your Time Matter's DMS system for a certain Client and/or Matter.
- When an assistant or docket clerk sets a court date on your calendar, you can be immediately notified for a certain Client and/or Matter.

⊕ **Contact Matter Journal –** From a Contact or Matter, you can open a specified journal view that shows related items to that Contact or Matter. This has all the power and functionality of the Personal Journal.

⊕ **In/Out List –** Simplified view of Time Matters users who are in or out of the office. You can set your return date and time and when logging back into Time Matters be prompted to check back in. You can also right click on the messenger to view and change your status on the In-Out List.

⊕ **Inbox Enhancements –** Time Matters users who use email can now set inbox rules as inactive. For example, if you have a rule set to move a specific email to a folder, you can make it inactive to temporarily disable the rule. Also, from the Sent items in the Inbox, you can right click and select to re-send the email.

⊕ **Out of Office Responder –** The Out of Office Responder is an enhancement to Time Matters Email. When enabled, the Out of Office Responder automatically sends a pre-defined Email response based on incoming messages. Users are allowed to pre-define the number of times that the automatic response is sent and determine the response Email's subject and content; and set a reminder when you log back into Time Matters that the Out of Office Responder has been enabled with an option to turn it off.

⊕ **TM Mail Agent –** There is a new Inbox option that will place the TM Mail agent in your system startup. This will automatically check email even if Time Matters is not open.

⊕ **Process Send Multiple Email Enhancement –** You can now tag multiple Contacts, and using the Process send email feature, you can create specified relationships between each individual Contact and the Email sent.

⊕ **Enhanced MAPI Email link with GroupWise –** The MAPI email link with GroupWise is now supported.

⊕ **Time Matters synchronization with GroupWise –** Additions, Deletions, and Changes made in either application update the other application's database. Databases supported by the Time Matters/GroupWise Synchronization are Events/Appointments. ToDos/Tasks and Contacts.

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Time Matters version 7 Features

⊕ **Set Regarding-Email Enhancements –** Now you can tag multiple Emails and save them to Contact and/or Matter records. For example, you received 10 Emails today, 8 of which were related to a specific Contact and Matter; you now can tag and save those emails and associate a Contact and Matter using this process.

⊕ **Palm PDA Billing Record –** Now you can add Billing Records through your Palm PDA. Enter your time associated with a Contact and/or Matter in your PDA and it will be sent to Time Matters during your next synchronization.

⊕ **Palm PDA Matter Record –** In addition to tracking your Contacts, Events and ToDos now you can track your Matters with a new Matters module on your Palm PDA.

⊕ **Blackberry Wireless Handheld Billing Record –** In addition to the Contact, Matter, Event, ToDo and Notes databases, you now can add Billing Records through your Blackberry Wireless Handheld. Enter your time associated with a Contact and/or Matter in your handheld and it will be sent to Time Matters during your next synchronization.

⊕ **RSS News Reader –** If you have subscriptions to News, you can use this view to check on News that matters. From this view, a user can launch an article, publication or newspaper from the Internet or a paid service like Mealey's Publication and News and send a link via email, or save the information to a Time Matters web form. The news content is integrated in the Personal Journal for Time Matters users.

⊕ **TimeCharts –** Create a visual timeline to display time dependent record types within a Matter or Contact. This visual view gives you a different perspective for only those records you'd like to see to help you manage your Matter or Contact. For example, you may want to see the phone calls made to your Client or from the opposing counsel or the Matter deadlines over the next two weeks. If you have a Client with multiple Matters, view the court dates for all Matters.

⊕ **Enhanced PCLaw link –** The enhanced link includes items like the ability to add an expense with associated PCLaw vendors from Time Matters and send it to PCLaw.

⊕ **Personal Journal Enhancements –** The Personal Journal has an overall new look. Contacts and Matters, a Record Review List and a News section are now available to be viewed from the journal. Users can view records such as: Events, ToDo's, Phone Calls, Emails, Billing, and Documents for all Contact and Matters. From the journal, you can add, change or delete any records. Using the drag and drop feature, you can specifically relate records to each other. For example:

- If you have your Matter and Contact list on the Personal Journal, you can drag and drop people from the Contact list to a specific Matter. You can drag an Expert that is used on multiple cases and relate them specifically as an Expert party.
- You have done some legal research that affects more than on e of your Clients; you can drag and drop that web research form and relate it to multiple Clients.
- You have a meeting scheduled for next Wednesday and have items that need to be done before the meeting. You can create the four tasks and drag them to the meeting. When you open the meeting record, you can see those items that need to be done.

⊕ **Enhanced LexisNexis Legal Research –** Time Matters for Lexis.com integrates a full range of LexisNexis research services (requires subscription to LexisNexis services). You can perform your legal research through Time Matters, saving a record of all your research. With this research history, you can search for related previous research, and can collaborate with your legal professionals in your office.

LEXLink lets you scan documents for legitimate citations and transforms them into hyperlinks that lead to the full text of the citation in the Lexis.com research system. Cites can also display a Shepardized® hyperlink that will allow you to go to the Shepard's report for that particular cite. Your point of entry for legal research doesn't matter. If you are searching on Lexis.com, you can use the TM Save button to save the research record in Time Matters. This enhancement will keep track of where you have been and transfer the history into the Time Matters research form.

Time Matters version 7 Features

- **Microsoft® Small Business Accounting –** The Microsoft Small Business Accounting 2006 link is a two-way link between Time Matters and Microsoft Small Business Accounting (SBA). Using the link, you can synchronize Contacts and Matters in Time Matters with Customers and Jobs in Microsoft SBA. Changes to those records in one application are reflected in the other application's database. The link may also be used to send Time and Expense entries from Time Matters to Microsoft SBA to complete the Billing process.

- **Send to HTML/XLS –** When previewing a custom, standard or program report, calendar or financial statement, use the Save feature to save the report as a web page (HTML) or Microsoft Excel file (XLS). If this particular report always needs to be saved in a particular format, use the Advanced Save feature to remember the settings to automatically create a Time Matters document record or automatically launch an email record with the saved file attached. Once saved in a spreadsheet format, fonts and other detail can be added to your preference.

- **Time Matters Hummingbird DOCS Open Link –** The Time Matters DOCS Open Link is available for our Enterprise edition customers. The Time Matters DOCS Open link lets you produce documents in Time Matters using DOCS Open profiles, with little user interaction. DOCS Open documents seamlessly integrate with Time Matters.

- **vCard Support –** A vCard, commonly known as an electronic business card, can be sent using Time Matters email. The setup for the vCard information is in your Email setup options. Time Matters also accepts vCard (.vcf) file attachments and can create a Time Matters Contact record. For example, when you receive an email that has a vCard attachment, use the TM Save button to create a Contact.

Time Matters version 6 Features

⊕ **New Outliner/Case Planner/Project Planner –** Create Outlines to lay out tasks, activities, plans, logic, etc. to specify entire work flows related to cases and projects. The work flows can then be converted in to Time Matters records (Events, ToDos, Email, Documents, etc) to execute on the Outline as part of dayto- day activities. Outlines can be exported to Word.

⊕ **Integration with LexisNexis CourtLink Docket Search –** Seamlessly integrate information from LexisNexis' database of over 200 million court records (CourtLink services required) into Time Matters.

⊕ **TM Connect –** Integration between Outlook and Time Matters providing high level functions of practice management directly from your Outlook email screen. Now TM Save, TM Open, and the TM Insider work directly from your Outlook email screen.

⊕ **Integration with LexisNexis Martindale-Hubbell Lawyer Locator –** Perform a Martindale-Hubbell Lawyer Locator search directly from a Time Matters name field. Instantly get background information on other lawyers.

⊕ **Time Matters Synchronization for Blackberry –** Synchronize, via Cable and "Over the Air," Time Matters data to Blackberry Wireless Handheld devices.

⊕ **Send to Excel –** With one click, you can send Time Matters List information to Excel for further processing or analysis.

⊕ **Check for Duplicate Contacts & Combine Duplicate Contacts –** Eliminate duplicate records and easily combine two or more contact records into one Contact Record, including sub-records and attachments.

⊕ **Security Setup Exceptions –** Evan more security control…now create Security exceptions on a Client/Contact and Matter/ Project basis.

⊕ **Security Groups & Profiles –** Maintain security by group and by profile, greatly simplifying security setup where there are larger numbers of users.

⊕ **Entry Form Tabs –** Create and customize Entry Form tabs on all record types. Previously tabs on the Entry Forms were limited to the 4 Main record types; now Form tabs are available on the Supporting record types.

⊕ **Enhanced Specified Relations of All Record Types –** The Time Matters Related Records feature now works for both Main and Supporting record types, not just the 4 Main record types as in previous versions. Now in addition to seeing all the Related Records for a Client/Contact and/or Matter/Project, you can see all the Related Records to a Document, Note, Email, Phone Call, etc. There is even a new drag and drop capability for Specified Relations.

⊕ **Improved Spell Check Engine –** Now Time Matters includes a Legal dictionary and more options for automated spell checks.

⊕ **Messenger Enhancements –** Instant Messenger now has Power Views, User Groups, Tag and Process, Archiving, Send Deleted Messages to the Time Matters Recycle Bin, and can be synchronized to remote Time Matters databases.

⊕ **Selectable Multiple Toolbars –** Create multiple customized Main Toolbars to help maximize efficiency. Simply right-click on the Toolbar to select another set of Toolbar buttons. This allows each user a high degree of customization and helps navigate now that Time Matters includes both front office and back office functionality.

⊕ **TM Save –** One of Time Matters most popular features, TM Save, with its ability to save a document directly to Time Matters Document Management from Word and WordPerfect, is now also available within Excel XP/2003, and Adobe Acrobat 5.0/6.0.

Time Matters version 6 Features

⊕ **Quick Tab Enhancements –** The color and shape of Quick Tabs can now be customized. For example, urgent items can have a red Quick Tab, items to be billed can be green, etc. Quick Tabs are now available on Entry Form sub-lists.

⊕ **Exchange Server Real-Time Synchronization –** Automatically, in background, synchronize Calendars, Tasks, and Contacts between Microsoft Exchange Servers (i.e., networked Outlook) and Time Matters.

⊕ **Staff Selector Colors for Calendars –** Users can easily identify to whom calendar appointments apply now that the Staff Selector buttons can be set to match the same color as the Staff Events and ToDos on the calendars.

⊕ **TM Save of Email Attachment Results in a Specific Relation Type Related Record –** Specified Relations between the email record and the attachment are now just a click away.

⊕ **Email Enhancements –** Email now supports additional HTML features, MIME embedded graphics, additional spell check options, and new User Groups and Distribution lists.

Time Matters version 5 Features

- **New Interface –** Version 5.0 has a New Interface that has been completely upgraded with the help of the same graphics specialists who contributed to Windows® XP and several leading Macintosh® applications. The result is that Time Matters looks as good as any commercial-class software in the market, a rarity for market-specific software. The look is clean, professional, and very pleasing.

- **Email –** Time Matters' own Email is now faster, more feature rich, and includes a comprehensive Spam Blocker. Email also includes an innovative new Safe Viewer which allows you to view HTML email without risk from hazardous links, rogue applets, worms, or viruses. Suspected spam can be classified in up to five levels; Highest (Red), High (Orange), Medium (Yellow), Modest (Blue), and Low (Green), and each level can have its own set of spam processing rules. The spam rules and actions can be set on a program level for the entire office or the user level, for each individual. First looks at the spam blocking feature suggest the feature will also get wide use to control staff abuse of email.

- **TM Open –** Document Management now includes unlimited versioning, reversion, auditing and a new TM Open feature that allows opening documents managed by Time Matters directly from Word or WordPerfect. Staff can now complete Time Matters documented automation and management functions from their word processor without having to open or be trained on Time Matters.

- **PDF Everywhere –** Version 5.0 introduces PDF Everywhere which adds PDF generation capabilities throughout Time Matters. PDF Everywhere provides much more PDF document functionality than applications which typically use just a printer driver to create PDFs. Now Time Matters reports, invoices, scanned documents, and documents created by Time Matters' own document automation system (Formattable Clipboard) can now be saved directly as PDF files (or RTF format), then emailed and/or sent to document management in one step. Special PDF templates can be set up to save settings including editing rights, security, passwords, etc. All you need is the free PDF viewer. Special PDF generation software is not required.

- **Scheduler and Parallel View for Calendars –** There are two important new calendar formats in Version 5.0. The new Scheduler View uses Gantt chart type displays to show multiple staff vertically and time horizontally. The result? It has never been easier to find available time to schedule meetings for multiple staff. There is also a new Parallel View of the daily calendar, which shows individual staff calendars side-byside.

- **Power Views –** Version 5.0 introduces Power Views, which show information on the main records lists as a preview pane, eliminating the need to drill down to display record details or supporting main list screens, including supporting records and graphics.

- **Record Review –** A new collaborative Record Review feature allows individual records to be reviewed by specified staff who may need to be consulted on edits or additions to the record. The Review feature then tracks a running dialog of comments and responses, including an audit of actual additions, changes, or deletions to the record. This is great for document and case note drafting collaboration, conflict of interest checking, and updating or correcting record information.

- **Report Writer and Invoice Designer –** There is a new No-Compromise Report Writer/Invoice Designer that can even use technology derived from the Time Matters' document automation features to create dynamic text messages based on the data to be printed in the report or bill. For example, if the amount owed is overdue 30 days, the message can be a friendly reminder. If it's over 90 days, the message can be a bit more compelling. Guidelines can span multiple report bands, field labels and fields can be not only aligned to guides, but they can be "stuck" to guides enabling a group of fields to be moved as one block. Multiple fields can be "lassoed" and have font and other properties set in one easy step. The extent to which the invoice designer allows you to use text and graphics to create the exact invoice you want is impressive.

Time Matters version 5 Features

Other highlights – Other highlights include almost double the user-defined data entry fields, with almost double the allowable characters in fields, more customizable data entry forms, user-definable sorts on Quick Tabs, and more powerful global search/ knowledge management. Quick Tabs can now use staff tokens which show filtered records for the current user without setting up specific filters for each staff. Advanced Search now can handle 10 simultaneous search formulas with grouping (i.e., parentheses) and both Advanced and Standard Searches can now use intelligent search tokens such as: This Week, Last Week, Next Month, etc.

Resizable Data Entry Forms – The main data entry forms in Version 5.0 are now resizable, a particularly useful feature for the notes, phone, and email forms where lengthy text is often added. Most programs do not allow their data entry forms to be resized and the few that do, typically resize the window, but the fields do not resize. Time Matters' data entry forms are now resizable and the geometry is maintained, which allows the fields themselves to resize as well. If you have a higher resolution screen, the increased field sizes and text can be a real benefit. The form areas can now be customized to show additional fields, a list of related records, or a memo field. Like previous versions, version 5.0 will be available in a LexisNexis® version that adds comprehensive legal research to the Time Matters Web research engine. The standard Time Matters Web research engine can also be used on other research sites such as WestLaw, LOISLaw, FindLaw, etc.