



Time Matters User Guide

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About the Authors:

Neil A. Johnson

Neil A. Johnson is the Managing Partner of Practice Development Partners, Ltd; a firm that offers project planning, implementation, customization, conversion, training and support to professional service firms implementing solutions based around the LexisNexis Practice Management (LNPM) suite of products.

Emphasizing practical and proven solutions for small to mid-sized law, CPA, management consulting, and other professional service firms, Mr. Johnson works with all levels of the organization to improve profitability, increase customer satisfaction, and manage information more efficiently. His unmatched blend of management experience, technical knowledge and customer service allow him to look at both the big picture when working with partners and the details required by support staff. He has trained thousands of users in various formats and settings over the last twenty plus years.

Beginning his career as a consultant with a Big Four accounting and consulting firm, Mr. Johnson has over twenty years experience in the technology arena. He is experienced in implementing solutions for many types of law firms, including personal injury, insurance defense, property tax appeals, litigation, estate planning, family law and more.

Mr. Johnson is a Certified Independent Consultant (CIC) for the suite of LexisNexis Practice Management products including Time Matters, Billing Matters, Billing Matters Plus, World Server, Hot Docs, and PCLaw. He has been a CIC for the past six years, working with hundreds of firms over that period. He is also a Microsoft Certified Systems Engineer (MCSE).

Jeffrey S. Krause, Esq.

Jeffrey S. Krause is a Wisconsin attorney and is the owner and co-founder of Information Technology Professionals, LLC. Information Technology Professionals provides a full range of technology services to law firms of all sizes.

After beginning his career in private practice, Mr. Krause began assisting other attorneys to better use technology in their law practice. Since 1998, he has assisted hundreds of law firms through custom configurations, training and general support.

Mr. Krause is a Certified Independent Consultant (CIC) for the popular Time Matters Business and Practice Management software as well as its companion, Billing Matters. He has worked with Time Matters through its last five versions and has assisted hundreds of law firms during his eight years as a CIC. He is also a CIC for several other Lexis Nexis products including HotDocs and PCLaw.

Mr. Krause is a frequent author and speaker on a variety of legal technology topics. His extensive background includes knowledge of document management, e-mail systems, litigation support, time and billing, web marketing and office suite applications.

Prior to embarking on his career as a Technology Professional, Mr. Krause was engaged in the private practice of law. His legal background includes Plaintiff's Personal Injury, Insurance Defense, Real Estate, Land Use Planning and Corporate Law. Jeff is a 1996 graduate of the Marquette University Law School. He also holds a B.A. and M.A. in History from the University of Wisconsin-Milwaukee.

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Introduction



1 Introduction

Time Matters is a program that will change the way you work. It replaces or supplements a number of applications that you use every day by giving you shared access to calendars, address books, documents, e-mail and more – all in one easy to use program.

Time Matters is a very flexible program. Some businesses may use it only for its powerful calendar features while others may use only its shared address book. Other firms utilize every possible feature of the program and continue to search for new capabilities. The program can accommodate businesses of all sizes and types.

There is no "correct" way to use Time Matters. This training guide will provide you with many tips and tricks to help you get the most out of the program, but do not assume that there is not a better way to use the program in your firm. Our intention in creating this guide is to show you some of the many things you can do with Time Matters.

Calendars and Scheduling



2 Calendars and Scheduling

2.1 Overview

Time Matters offers very powerful and flexible calendaring.

The Time Matters calendar was created with case management in mind. For this reason, it includes many features not found in other electronic calendars. Time Matters makes it extremely simple to view the calendars of others and to assign records to others. It also includes relational features that allow calendar items to be linked to legal matters as well as coding features for sorting and searching of the calendar.

Time Matters also has multiple customizable calendar views, allowing users to view their calendar in the way most suited to the way they work. Users can work in daily, weekly or monthly views and show the calendar data important to them.

Another feature of the Time Matters calendar is the ability to alert users of upcoming and current appointments and tasks. Once again, Time Matters allows users great control over their alerts and reminders while allowing others the ability to view and monitor these reminders.

2.2 Alerts, Reminders and Watches

2.2.1 Alerts, Reminders and Watches Overview

Your system has likely been configured to open to the Alerts, Reminders and Watches screen (Alerts). This screen functions as a tickler system, warning you of upcoming dates and other items of importance. It is important to understand that the Alerts are not your calendar. Alerts are based on specific criteria defined when a record is created. Therefore, users possess a great deal of control over what records appear on the Alerts and how they appear.

The Alerts are divided by record type. Gray lines separate the record types. Typically, Events are displayed first followed by ToDos. You will learn more about all of the record types later but, for now, think of Events as date and time certain occurrences and ToDos as deadlines.

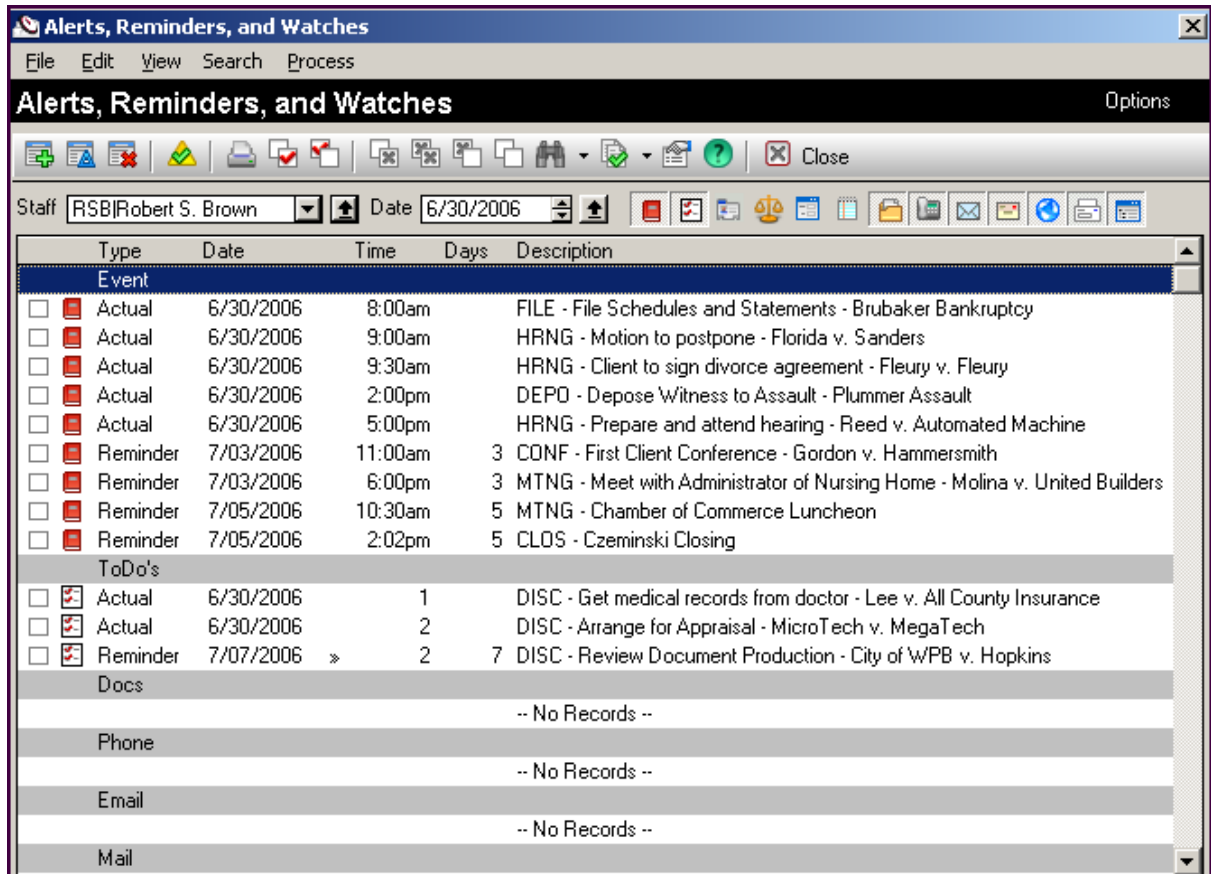
Four types of alerts or warnings may appear on the Alerts.

Actual denotes a record occurring on the date displayed, usually today. In other words an Event displayed as Actual is taking place today while a ToDo displayed as Actual is due today. All calendar items will appear as Actual on the day they are set to occur. The user has no control over this.

Reminder denotes a record that is scheduled to take place a number of days in the future. The Alerts will identify the date and number of days away. The number and frequency of reminders is determined by the user when the record is created.

Alert denotes a record that has been placed on the calendar of the staff member and for

which the record author specifically chose to notify the staff member. An Alert will appear on the Alerts screen regardless of the occurrence date or the reminder schedule. An Alert can be turned off or accepted by the staff member. When an Alert is accepted, the record will be removed from the the Alert list until such time as the first reminder is scheduled to appear.



Alerts, Reminders and Watches

Watch is the final type of Alert that may appear. Watches monitor records for inactivity and alert the user that the record has not been modified during a certain timeframe. Inactivity watches are created using the Alerts Options. See ITP's Customization Guide for details.

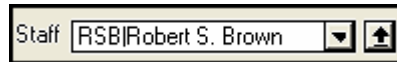
2.2.2 Alerts Controls

A variety of controls allow for control over the Alerts and the records that appear on the list. These controls appear in the small toolbar that appears just above the list.



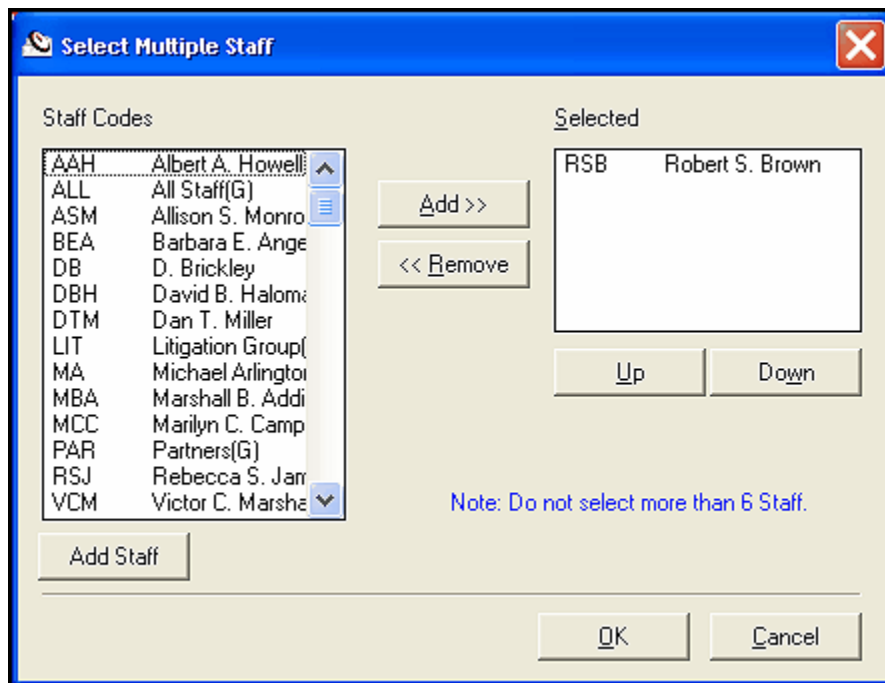
Alerts Controls

The first control is one found throughout Time Matters. The Staff selector allows the user to select which staff member's records display on the Alerts. Selecting the single down arrow allows the user to select any one staff member from the list and display Alerts for that staff member.



Staff Selector

Clicking on the up arrow will display a screen allowing the user to choose multiple staff to display. Up to six may be selected. Selections are made either by double clicking on your choice or single clicking (highlighting) an item then selecting Add or Remove in the center of the screen. After OK is clicked, the Alerts will display a combined screen for all selected Staff with initials identifying the specific staff. You will find similar multiple selectors of this kind throughout Time Matters.



Multiple Staff Selector

Records on the list can be modified and manipulated in a number of ways. The most often used control is to open a record by double clicking with your mouse. Once open the record can be reviewed or modified by the user.

Other controls on the Alerts screen allow you to manipulate the records in the list.



Add/Chng/Del

Users should familiarize themselves with the first three controls as they are found throughout Time Matters. The **green +** allows the user to add a record to Time Matters. In the case of the Alerts, you should first highlight the gray line above the particular record type you would like to create. The **blue ▲** opens the highlighted record for editing. Finally, the **red x** deletes the highlighted record.



Alerts Toolbar 2

The next set of Alerts controls (Alerts Toolbar 2) allows users to manipulate displayed records in various ways. The yellow triangle holding a check mark is the Accept Alert button. This removes an item from Alert status and returns the record to its date and reminder settings.

The printer control prints the Alerts list in a format chosen by the user.

The next two buttons allow for marking a record done or not done. This is useful for records that are complete as following can be turned off without opening the record.



Alerts Toolbar 3

The next six controls relate to processing and searching records (Alerts Toolbar 3). The first four controls allow the user to tag one record, tag all records, untag one record or untag all records. Tagging is how the user tells Time Matters that he or she wants to do something with the selected records. Tagging can also be done by clicking in the small box before a record in a Time Matters list.

The binoculars icon is the Time Matters Search function. You will learn more about searching later. You will also learn more about the Process Records icon which appears after the Search icon.



Alerts Toolbar 4

The next three buttons are Record Properties, Help and Close. Record Properties will display specific information about a highlighted record. Some of the information displayed is the date the record was created, which user created it, the last date it was modified and much more.

Help displays the Time Matters Help dialog while Close exits the user from the Alerts.



Alerts Record Selector

There are twelve buttons allowing the user to toggle on and off different record types on the Alerts screen. In order the buttons toggle Events, To Dos, Contacts, Matters, Custom Forms, Notes, Documents, Phone Messages, E-Mail, Mail, Web and Billing Records. When a button appears pushed in, that record type will be displayed.

2.2.3 Alerts, Reminders and Watches Tips

Think of Alert notifications as a double check system. For example, a paralegal enters a statute of limitations item on an attorney's calendar. The statute is set to expire in two years so the attorney does not need to be reminded of it until it is much closer. By notifying the attorney of the record, the paralegal allows the attorney to see that the statute was properly

docketed. Upon verification, the attorney can accept the Alert and wait for the appropriate reminders at a later date.

A Staff member in Time Matters may be something other than a person. Firms might choose to create a staff member for shared resources such as laptops, conference rooms or company cars.

The Add, Change and Delete controls are common throughout Time Matters. Typically, the Add record control allows you to create a record of the type that you are currently viewing. If you are working in the Contact list, clicking Add Record will open a blank Contact record.

*Many new users confuse tagging with marking records complete. This confusion stems from the fact that several other applications (Outlook and GroupWise, for example) use a checkbox as the method for designating a task complete. **Tagging a record in Time Matters will not mark it Done.***

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