

# 30 TIME MATTERS TIPS

by Jeffrey S. Krause, Esq.

Here are 30 tips to help you make the most of Time Matters Practice Management software.

## 1. Version 9/10 Search Entry on Toolbar

Version 9 added an indexing feature that reads and catalogs every Time Matters record as it is added to the database. Indexed searches are many times faster than Global Searches in previous versions of Time Matters. The easiest way to access the index is by adding the Search Entry feature on the Toolbar. Simply customize your toolbar and add Search Entry. This button normally works best if it is at the far right of the toolbar.

## 2. Folders for AutoEntry Forms and Triggers

Having trouble organizing the AutoEntry Forms and Triggers you have created? Both of these features include the ability to create folders to organize and store your creations. Simply click the folders icon in the List of AutoEntry Forms or Triggers.

## 3. Remove Unnecessary Special Dates

Tired of reminders regarding Armed Forces Day, St. Patrick's Day or Flag Day? Select Special Dates from the Calendar Menu. You can remove unnecessary dates, edit whether the remaining dates are legal holidays, or add your own Special Dates - like your birthday.

## 4. Regular Backups and Maintenance

You can never have too many backups and someday having a series of regular backups may save you a great deal of time and frustration. In addition to backups, routine re-indexing of the Time Matters database (especially with Time Matters Professional) can improve performance. You don't even have to re-index the entire database every time. The Database Utilities dialog allows you to choose different things to re-index, depending on which parts of the database are not performing well.

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## About the Author

Jeffrey S. Krause is a Wisconsin attorney and is the owner and founder of Krause Practice Management, LLC, a consultation firm that provides technology advice and service to law firms of all sizes, with a focus on the efficient use of technology in the law office.

Mr. Krause is a Certified Independent Consultant (CIC) for the popular Time Matters Business and Practice Management software as well as Billing Matters, HotDocs and PCLaw. He has worked with Time Matters through its last nine versions and has assisted hundreds of law firms during his ten years as a CIC. He assists law firms with many other popular products including TABS3, Worldox, digital dictation and scanning solutions.

Mr. Krause is a frequent author and speaker on legal technology subjects. His Practice Management Blog (<http://blog.krausepm.com>) covers subjects ranging from law firm marketing to product tips and tricks.



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## **5. Lock Out Users During Maintenance**

The User Login Status screen under the File, Utilities allows you to lock out non-administrative users. Use this feature to keep the rest of your users from logging in and interrupting a database re-index, backup or restore.

## **6. Effects of Archiving**

Many users believe that archiving records in Time Matters removes them from the database. This is a common misconception. Archiving records simply flags them within the database to display in the Archive List rather than the Active List. Archiving does not reduce the size of the database or make the database perform better.

## **7. Inactive Staff**

Version 8 of Time Matters added the ability to make Staff inactive. Setting a Staff to Inactive removes that Staff member from drop down lists so that they cannot be assigned to new records. Setting a Staff to Inactive does not alter any existing records to which that staff is assigned. Access this feature by opening the Database, Staff Menu and opening any Staff member.

## **8. Replacing One Staff with Another**

If you need to reassign records from one Staff to another, a specific process is required. First, you must identify all of the records that need to be changed. Tag these records. Next, select Change Records from the Process Menu. Create a new template and replace the entire Staff field with the new, correct Staff initials.

## **9. Save and Copy**

Save and Copy is a great way to shortcut data entry. Once you have completed a record, select Save and Copy from the File Menu. The current record will be saved and a new, complete copy will appear. Make any necessary changes and save the new record. This function is particularly useful when creating individual contacts within an organization.

## **10. Forcing a Validated Link**

Some, but not all, fields that lookup another list require that the field be completed with an existing record from the other list. You can set other fields to require a valid record by customizing the field. Click Set Field Links, then select the checkbox that reads "Entry must be in Time Matters "X" File (Validated Field)

## **11. Removing Access to Unused Record Types**

If you are not using Custom Forms or Mail records, why show them at all? Go to File, Setup, General, Program Level. Select Lists and uncheck any record types that you are not using.

## **12. Color Coded Quick Tabs**

As you continue to add Quick Tabs, it becomes increasingly difficult to keep track of which Quick Tab you have select and what each one is showing. Coloring Quick Tabs allows different tabs to stand out. If you set the alternating lines on the Quick Tab to show the same colors, it becomes very easy to tell which Quick Tab is currently selected.

## **13. Full Text Searching of Documents**

Time Matters can create one or more full text document indexes. Create an index by accessing Document Index Manager under the File, Setup, Utilities Menu. Add an Index and designate the folders that you would like indexed. Time Matters does not automatically update the index but you can do this manually at any time. You can also use Windows Scheduler to update the Index automatically on a set schedule.

## **14. Specifying Printer Trays**

Time Matters 8 added the ability to specify printers and printer trays for varying functions. This function is available under the File, Setup, Printer Setup menu. You can specify printers and trays for Reports, Labels, Envelopes, Bills, Pre-Bills, Statements and Checks.

## **15. Creative Uses for Staff Records**

You can use Staff records for anything that requires a calendar. Examples of this are conference rooms, shared laptops, company cars or any other shared resource.

## **16. Time Matters Messenger for Document Collaboration**

One of the best uses of the Time Matters Messenger is to deliver other Time Matters records to database users. This is especially true for Document records. Document records that are sent via the Time Matters Messenger do not leave the server, so you always know that everyone is working on the same document. In addition, because the same document is not being emailed back and forth as attachments, your server is not filling up with multiple copies of the same document.

## **17. Hiding the Delete Button on Forms**

Hiding the Delete Button on Form Toolbars, especially on the Contact and Matter Form, helps prevent accidental deletions. The problem is that users looking at a Contact or Matter sub list often highlight a record in the sub list then click the Delete button near the top of the record. Unfortunately, this deletes the Contact or Matter rather than the record from the sub list. To avoid this problem, customize the Contact and Matter Form Toolbars at the User Level. This is done under File, Setup, General, User Level, Forms Tab.

## **18. Ordering Fields on the Regarding Line**

For many years, the default order of fields on the Regarding Line was Contact, ContactNo, MatterRef, and MatterNo. This was changed in the default shipping edition of Version 9 to MatterRef, MatterNo, Contact, and ContactNo. Versions 8 and 9 allow you to rearrange the order of these fields. Under Program Level Settings, Form Settings, you can choose to Customize Regarding Line Fields. Click Set Options to choose whether the Matter or Contact fields show first and then specify the order of the specific fields.

## **19. Function Keys**

There are a number of useful keyboard shortcuts in Time Matters. Here is a list of the Function key shortcuts.

F1 - Time Matters Help

F2 - Lookup key when inside a record. Opens the appropriate list. Useful in Regarding Line, Staff and Code fields.

F2 - Combined Search when in a List.

F3 - Event List

F4 - ToDo List

F5 - Contact List

F6 - Matter List

F7 - Note List

F8 - Phone List

F9 - Document List

F11 - Email List

F12 - Billing List

## **20. Audit Tab**

Every Time Matters record has a series of Properties that can be reviewed. The Properties button can be found on the Record Toolbar and looks like a small hand holding a piece of paper. Within the Properties interface, there is an Audit tab. This tab will display information about all fields within that record that have been selected for auditing. Audit is turned on for individual fields through field level customization.

## **21. Open Containing Folder**

Right click on any document in Time Matters and one of your choices is "Open Containing Folder." This will open Windows Explorer and show you all of the documents in the same folder as the document you selected. This can be useful in a number of situations including attaching multiple documents to an email, creating an Adobe Acrobat binder, or creating a compressed zip file.

## **22. Emptying the Recycle Bin**

Time Matters version 8 introduced the ability to process multiple records in the Recycle Bin based on specific criteria including date deleted. Periodically emptying records that have been in the Time Matters Recycle Bin for a specified amount of time can reduce clutter and speed up access when you really need it.

### **23. Copy User Level Settings**

User Level Settings can be copied from one user to another. Open User Level Settings for any user and select "Copy" in the lower left of the screen. Select the user to copy from and any users that will be copied to. Finally, select the specific settings that will be copied. Among the settings that can be copied are Lists, Forms, Calendars, and Messenger.

### **24. Setting Default Search, Process and Power View by User**

Each user can set their own default Search, Process and Power Views on each list. Open the List and click Options.

### **25. Setting Power View Defaults at the Program Level**

If you would like your users to see a specific Power View when they open a List, you can set this at the Program Level. Go to File, Setup, General, Program Level, Lists tab. Choose the list you would like to work with and click Options. On the General tab, you can choose a default Power View. Keep in mind that the Power View default you choose here is only applicable if a user has not chosen their own user level default.

### **26. Setting Alarms**

In addition to Reminders, which occur in a specified number of days, Time Matters allows you to set Alarms. Alarms provide a pop-up warning on the day of the Event or other Time Matters record. Alarms must be for a specified number of minutes and are set by select the Alarm, or bell, icon on the record toolbar.

### **27. Using the Duplicate Checker**

Did you know that Time Matters has a function to search for and merge duplicate Contacts? You can do this in one of two ways. The recommended method is to open a Contact that you know is a duplicate. Click the Edit Menu and choose Duplicate Check. A dialog will appear that allows you to search for duplicate data in several fields. Once a duplicate is found, click Combine and choose which data will be used in the final record. A second method is to choose Check for Duplicate Contacts using the Utilities Menu. The only problem with using the second method is that it will search the entire database. This takes much longer.

### **28. "Hidden" Fields**

Time Matters automatically tracks information about every record you create. This information includes the date the record was created, who created it, when it was last modified, etc. Most of this information is available when you view the Properties of the record. It is also searchable with Advanced Search and these "hidden" fields can be added to the list display columns.

## 29. Navigators

You can create custom Navigator buttons that launch websites or Windows applications. Click on the Navigator interface and Options. Next, Click Setup then add a new Navigator or modify an existing one. Create a Custom Link and enter the path to an executable file or a website URL.

## 30. "Web" Link to Document Folder

You can create a link on any Time Matters form that opens a Windows folder. Simply customize a field as data type web and type the complete path to a windows folder. A handy way to use this is a shortcut to documents folder for a specific matter (e.g. c:\demodocs\Able\Florida).

### **Credits:**

This list of 30 Time Matters tips was originally created by Jeffrey S. Krause and Neil A. Johnson for the IP Associates Advanced Time Matters Boot Camp. To see when a Time Matters Boot Camp is coming to your area, please visit <http://www.ipassoc.com/bootcamps/index.cfm>.

## About Krause Practice Management, LLC

Krause Practice Management was founded in June, 2007 by Jeffrey S. Krause. KPM provides technology consultation services to law firms and other professional offices of all sizes. They focus on implementing case management, billing and accounting, document management, and document assembly systems.

No firm is too large or too small to work with Krause Practice Management. Jeff Krause has worked with hundreds of firms ranging from solo practitioners to firms with over 100 attorneys.

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