

# How to Install and Use Text Lookup Lists in Time Matters®

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## **What Is a Lookup List?**

Lookup lists are used throughout Time Matters. Users are very familiar with lookup lists that create links between records. For example, the regarding fields on an Event record, “lookup” information and create a link between the Event and a Contact and Matter record. This is the most common lookup list used in Time Matters. Another type of lookup list is the Specify Field Entry Choices and Edit Entry Choices selection on Field Properties Screen. When these are selected, the Edit Field Choices dialog allows you to create a specific list of choices from which the user can select.

Finally, there is the lookup list that is the subject of this paper. This lookup list is created in a text (.txt) file which is then selected via the Lookup from File selection. This selection is found in both the Field Lookup Options of the Field Properties Screen and on the Edit Field Choices dialog. Depending on which selection method you use, your lookup file will work in slightly different ways. If selected in the Field property screen, your lookup field will appear as a lookup arrow and display a large part of the list when selected. If you select your lookup file from within the Edit Field Choices dialog, your file will appear as a drop down arrow. If the user is restricted to the list choices, the drop down field allows them to start typing the beginning of their choice and offers auto-complete – a function not available when selected via the Field Properties screen.

Lookup files can be .dbf, .csv, or .txt files.

## **Why Create Custom Lookup Lists?**

Writing as someone who configures and customizes Time Matters for different firms, I find custom lookup lists very useful. There are several reasons why I create custom lookup lists in .txt files rather than using the Edit Field Choices Dialog.

First, the same custom lookup list can be used over and over again across many Time Matters Form Styles. For example, one of the most common uses of the Edit Field Choices dialog is to create a Yes/No selection. If we assume that you will eventually setup ten different fields with these choices, you will have to type Yes ten times and No ten times, plus work your way

through the various prompts with the Edit Field Choices dialog. Creating one .txt file with your two choices allows you to simply click once on Lookup from File, pull down the arrow and select your file. While this may not save you hours when creating Yes/No selections it will definitely save you a lot of time if you need to use a longer list over and over in your setup. What if your list of choices consisted of fifty states?

Another reason to use .txt files as lookup lists is that changes to the list only have to be made in one file. Lets imagine that you want to add a choice called "Maybe" to your Yes/No selection. If you are using the Edit Field Choices method you must add your new choice in ten different places. Using one .txt file means that you only have to change one file and the new choice will be available in every place the .txt file is used.

A final reason to use .txt files is that they can be used over and over again across multiple setups. If copied to a different Time Matters database folder, the .txt file used for lookup becomes available to that other database. I have a small collection of .txt files that I use over and over again as I customize Time Matters for my clients.

To be fair, there is one minor function that you will lose if you begin using .txt files for your lookup choices. In the Edit Field Choices dialog you have the ability to move choices up or down in the list with the click of a button. You cannot do this with a .txt file. Instead, you will have to cut and paste or use some other manual method to re-order your choices.

### **Creating a Custom Lookup .txt File**

Creating a .txt lookup file is very easy. Simply open Notepad or any other text editing program. Leave the first line blank and enter the rest of your choices one to a line. Next, select the File Menu and Save As. Save your new file to the Time Matters shared data folder and within the Files, Lookup subfolder. Usually this is S:\tmw5\files\lookup or something similar.

### **Multiple Column Lookups and .csv Files**

In addition to .txt lookup files, Time Matters allows lookup information to be stored in .csv (comma separated variables) files. To create a .csv file, use Microsoft Excel and select Save As from the File Menu. One of your file type choices will be .csv. Don't worry about the warning from Excel that some features will not be compatible. Click Yes to save.

Using a .csv file gives you one distinct advantage over using a .txt file. A .csv lookup file will display several columns across the screen. Only the first column is available to populate the Time Matters field. However, there are times when information in the second or later column is important in order to determine whether you are selecting the correct data. You must select your lookup list from the Field Properties screen to get the benefit of multiple column display.

If you need to lookup information in two or more columns of a .csv file, you will need multiple files and multiple Time Matters fields. This is easier than it sounds. Simply open the .csv file in Excel, cut and paste the necessary column to the first position and save the file with a new name. Finally, customize your Time Matters fields to access these different lookup files. Remember, you can only populate Time Matters with the first field from each lookup list.

### **How Do You Install a Lookup List You Have Downloaded?**

Installing a copied or downloaded lookup file is even easier. Simply, save the file to the Lookup folder as described above. The file is now available in either the Field Properties screen or the Edit Field Choices dialog box.

### **Bonus Tip**

#### **Using Yes/No Lookups Instead of Checkboxes in Time Matters**

While reading this article, you may have wondered why I refer to Yes/No selectors when I could use a Checkbox field to accomplish the same thing. The answer is that they are not necessarily the same thing. A checkbox field has two possible choices, Checked=Yes or Unchecked=No. In reality, there is a third choice, which I would call "Unsure". In other words, if I am unsure as to the answer, a checkbox does not give me the flexibility to reflect this uncertainty. In addition, a search for "Unchecked" or No will find any records where, in reality, I do not yet know whether the answer is No. A .txt lookup file allows me to leave the field blank until I know whether the answer is Yes or No.

### **About the Author**

Jeffrey S. Krause is a Wisconsin attorney who advises and assists other attorneys with law office technology. He is a Certified Independent Consultant for Time Matters, Billing Matters, HotDocs and PCLaw. He is the founder of Krause Practice Management, LLC where he assists clients with all facets of legal technology and the co-founder of IP Associates, LLC, where, with Neil Johnson, he created and presents Time Matters Boot Camp, an full day training seminar, presented around the country.

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