

Configure the field so that it is a Required Text Field. This will make it mandatory for it to be filled in when a Matter is created. Name your field something like Doc Dir so that it is easily identified as your document save folder.

The screenshot shows a dialog box titled "Field Properties - Matter [Style: Default]". It is divided into two sections: "1. Field Descriptions..." and "2. Customize Field...".

In the "1. Field Descriptions..." section, there are four text input fields: "Screen Label" (containing "Doc Dir"), "Screen Tool Tip" (containing "Document Directory"), "Field Name" (containing "DocDir"), and "Core Field Name" (containing "MAT:MAT1_05_02").

In the "2. Customize Field..." section, there is a list of radio buttons on the left: "Text", "Number", "Date", "Time", "Checkbox", "Phone", "Money", "Soc Sec No.", "Email", "Fax", "Web", "Calculated", "Zip Code", "Launcher", and "Hidden". The "Text" radio button is selected and highlighted with a red box.

To the right of the radio buttons are several checkboxes: "Hide Label", "Audit", "Required", and "Keywords". The "Required" checkbox is checked and highlighted with a red box. Below these are "All Caps" and "Spell Check" checkboxes, which are unchecked. There is also a "Specify Field Entry Choices" checkbox and an "Edit Entry Choices" button.

Below the checkboxes is the "Field Lookup Options..." section, which has three radio buttons: "None", "Lookup from Record", and "Lookup from File". The "None" radio button is selected. To the right of "Lookup from Record" and "Lookup from File" are two dropdown menus.

At the bottom of the dialog box are "OK" and "Cancel" buttons.

Changes to the Document Form

The second step to our Document Management Setup is to make changes to the Document Form. As document management will be used to save all documents, this customization should also be done to the default Document Form. Unlike the changes you made to the Matter Form, you cannot make these changes using the main Form Style editor. These changes must be made from an open Document Form.

To configure the Document Form open a new blank Document Record. This should be done from the Document List rather than from a Matter Sublist because you do not want the MatterRef field to autocomplete just yet.

Once you have opened a blank Document Form, the first step is to configure one of the User (version 8 and earlier) or Custom (version 9 and later) fields. These fields are found in Area 2 of the Document Form. It does not matter which field you configure but you will need to remember which one you chose in a later step. In the example below, we have configured User3 or Custom3. We know this because it is the third field down in Area 2.

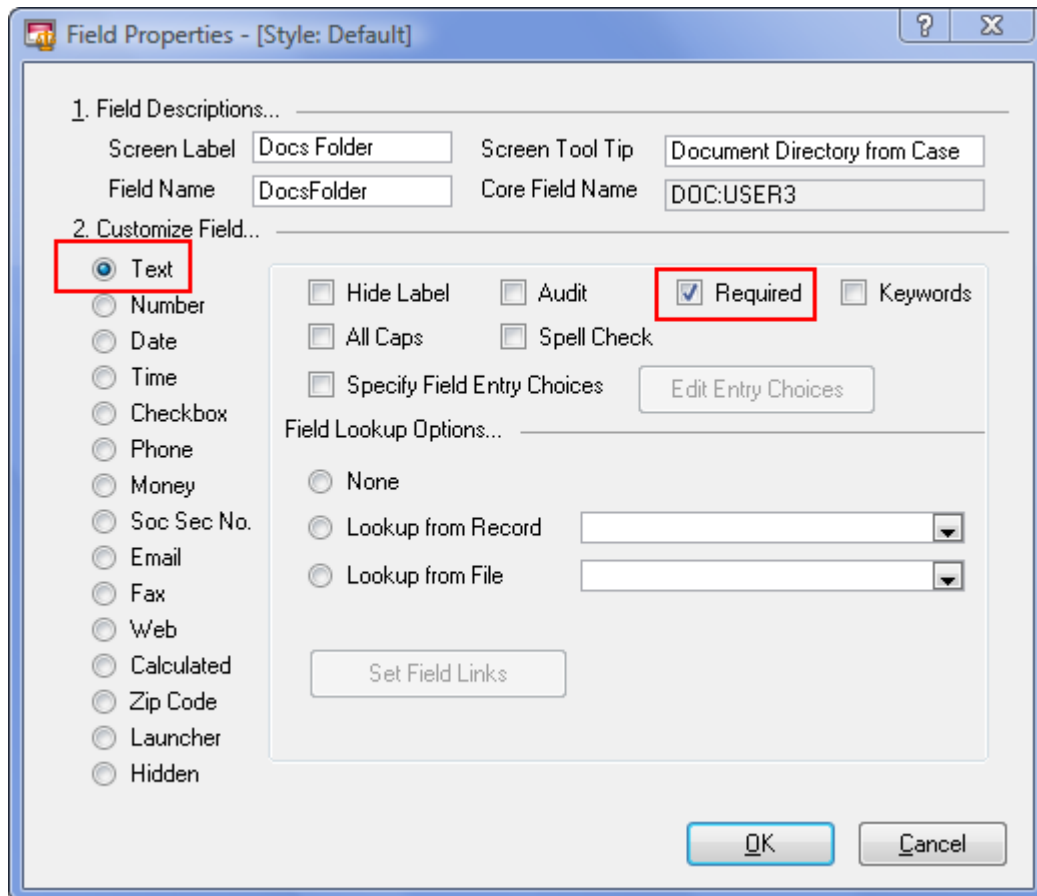
Once you have chosen a field, right click and select Customize Field.

The screenshot shows the 'Document Form - Add' window. The title bar reads 'Document Form - Add'. The menu bar includes 'File', 'Edit', 'View', 'Process', and 'Help'. The toolbar contains icons for 'Save & Close', 'Save', navigation arrows, a calendar, a clock, a printer, a scanner, and 'Cancel'. The main area is divided into tabs: 'Primary', 'Related', 'Notes', 'Documents', 'Phone', 'Email', 'Mail', 'Lexis', 'Billing', and 'Outline'. The 'Documents' tab is active. The form contains the following fields and controls:

- Date: 7/06/2008 (dropdown), Sun Time: 10:32am (dropdown), Code: (dropdown)
- Description: (text field), Staff: (dropdown)
- Regarding: (text field)
- File Name: c:\demodocs\3511462 (text field), Auto Name: (checkbox checked)
- Reminders: (text field), Follow (checkbox), Done (checkbox), Notify (checkbox), Hide (checkbox), Trigger (checkbox), Review (checkbox), Billable (checkbox), Private (checkbox), Status: (text field)
- To/From: (text field), Sent: 7/06/2008 (dropdown)
- Doc Type: (dropdown), Due Back: (dropdown)
- Docs Folder: (text field, highlighted with a red rectangle), Rec'd: (dropdown)
- Doc#: 3511462 (text field), Due Out: (dropdown)

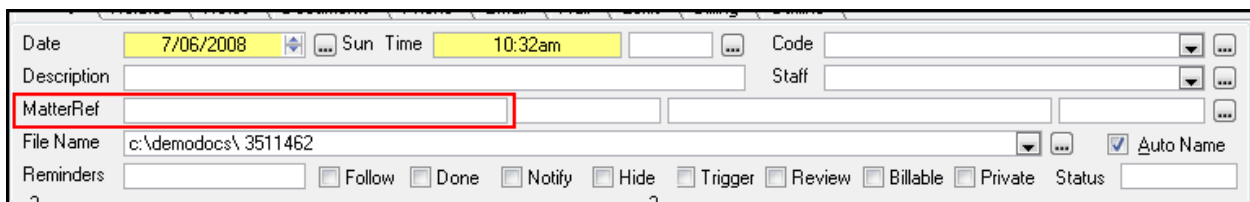
Below the form are buttons for 'Memo', 'Generate', 'Versions', 'Existing', 'New File', 'Clipboard', 'Merge', 'Scan', and 'HotDocs'. At the bottom, there are 'Data Source' and 'Template' tabs, a 'Select Record Type' dropdown set to 'Contact', and 'Add' and 'Remove' buttons.

Similar to the way you configured the Docs Dir field on the Matter, this field should be a Text field. Some firms like to make this a required field as well. Name this field Doc Dir, Doc Folder or something very similar to the way you named the field on the Matter Form.



Once you have configured the Docs Folder field on the Document Form you need to create a link between the Matter and the Document Forms. For new users, this is perhaps the most difficult step of this entire process.

Locate the MatterRef field on the Document Form. The location of this field will vary depending on your Time Matters or LNTPA version. In version 9, this field is the first field of the Regarding Line on the Document Form. In earlier versions it may be the second or third field. Right click this field and select Customize Field.



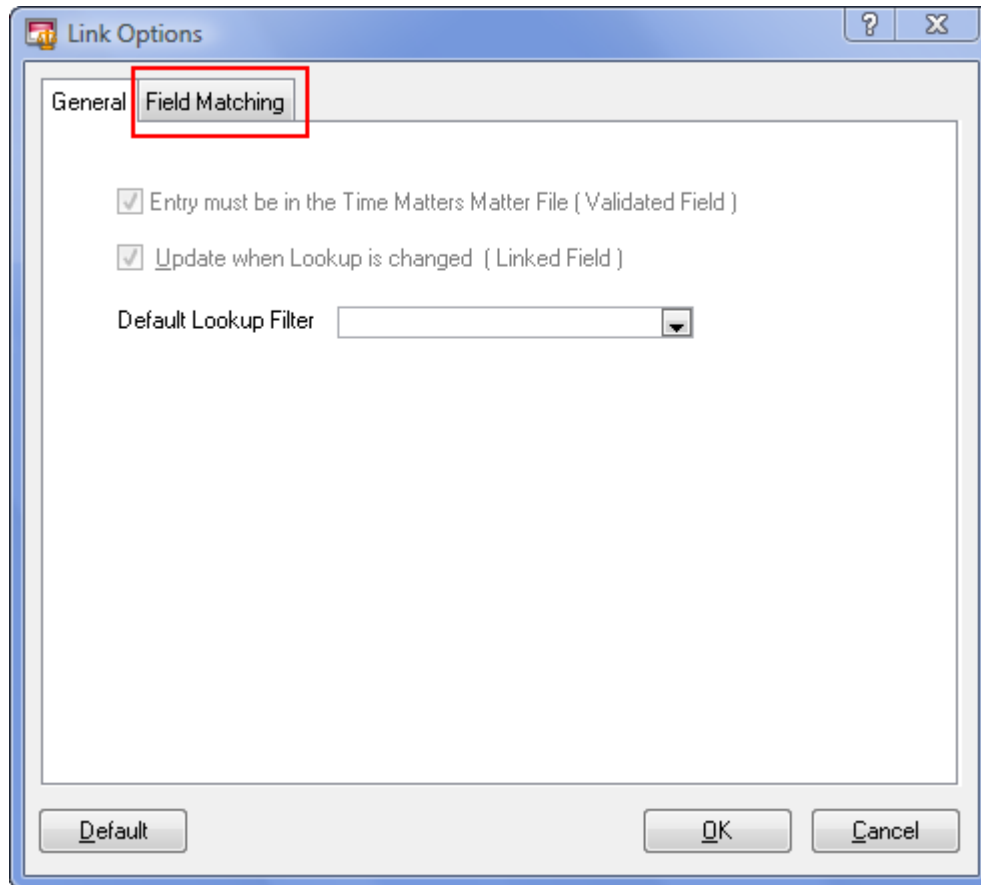
When the Field Properties screen appears, click Set Field Links.

The image shows a dialog box titled "Field Properties - [Style: Default]". It is divided into two sections:

- 1. Field Descriptions...**
 - Screen Label:
 - Screen Tool Tip:
 - Field Name:
 - Core Field Name:
- 2. Customize Field...**
 - Radio buttons for field types: Text (selected), Number, Date, Time, Checkbox, Phone, Money, Soc Sec No., Email, Fax, Web, Calculated, Zip Code, Launcher, Hidden.
 - Checkboxes: Hide Label, All Caps, Specify Field Entry Choices, Audit, Spell Check, Required, Keywords.
 - Buttons: Edit Entry Choices.
 - Field Lookup Options...**
 - Radio buttons: None, Lookup from Record (selected), Lookup from File.
 - Dropdown menu for "Lookup from Record": Matter.
 - Empty dropdown menu for "Lookup from File".
 - Set Field Links** button (highlighted with a red rectangle).

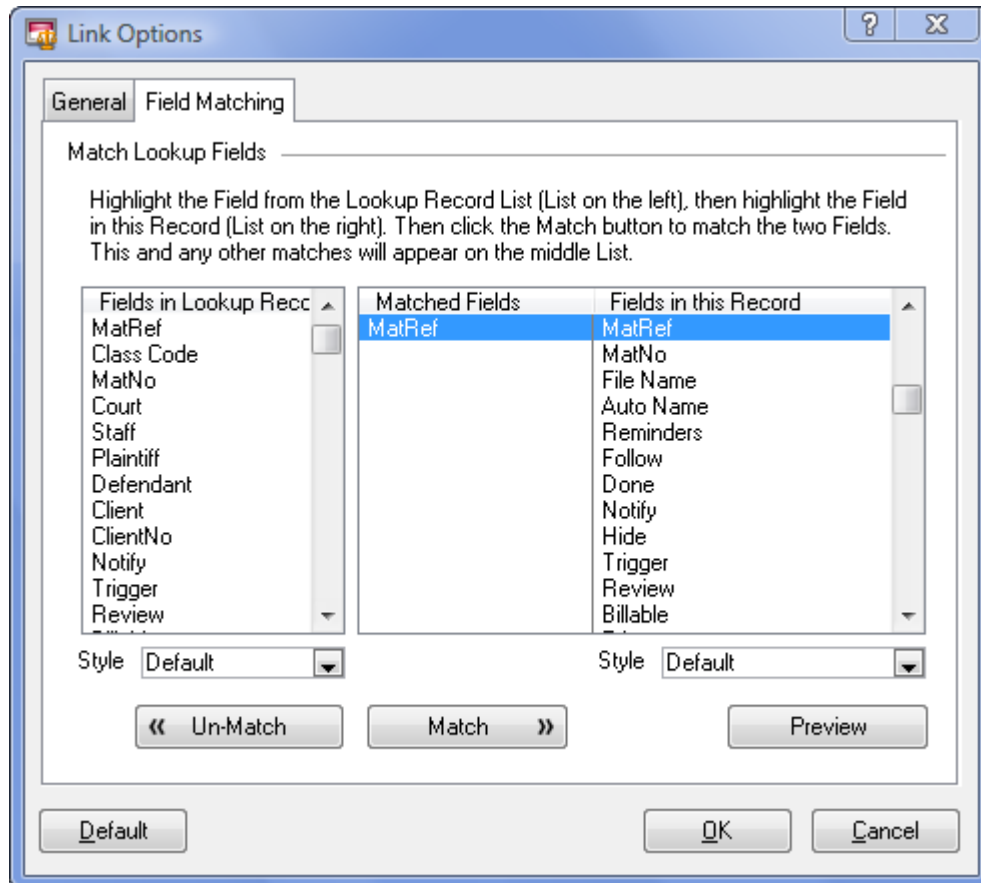
At the bottom right, there are "OK" and "Cancel" buttons.

When the Link Options screen appears, select the Field Matching tab.

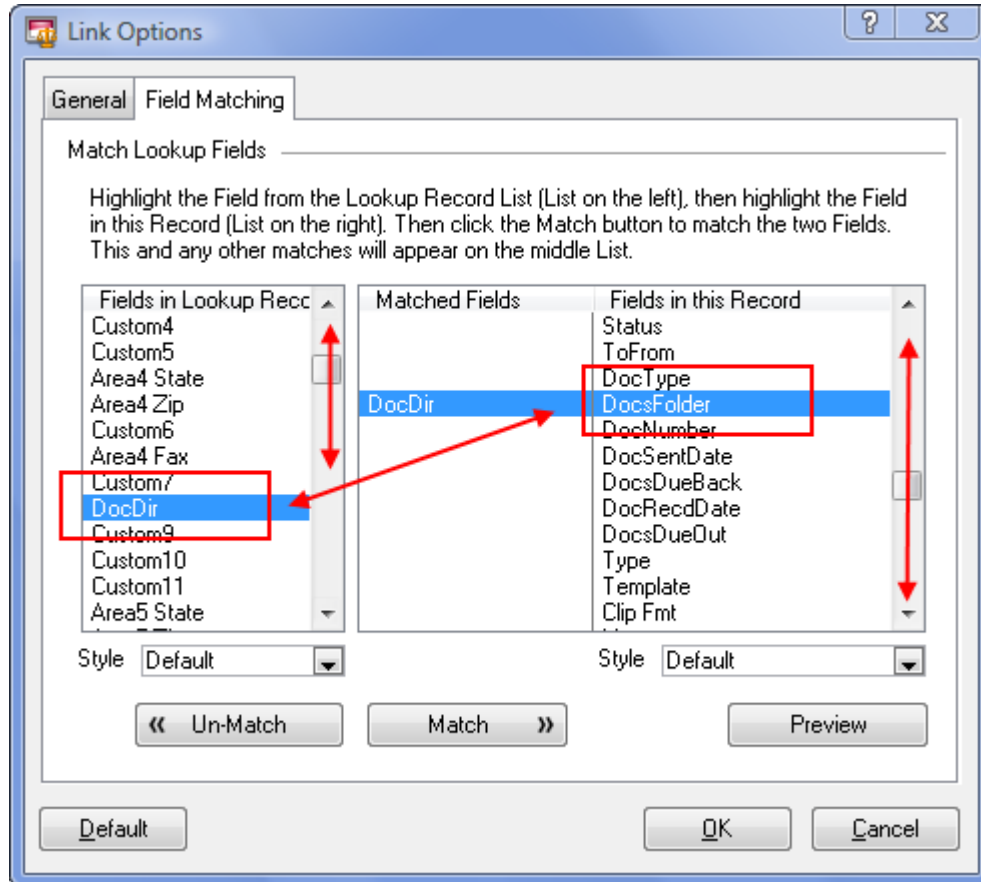


Once the Field Matching tab is displayed, three smaller windows will appear. The window on the left shows all fields on the Matter Form. The window on the right shows all fields on the Document Form. The middle windows allows you to match fields.

Notice how the MatRef field shows in the middle window. This means that the MatRef field from the Matter Form is matched to the MatRef field on the Document Form.



Scroll down through the fields in the left window until Doc Dir (or whatever you called your field on the Matter Form) appears. Next, scroll down through the fields in the right windows until Doc Folder (or whatever you named your field on the Document Form) appears. Highlight both fields, then click Match to link the fields.

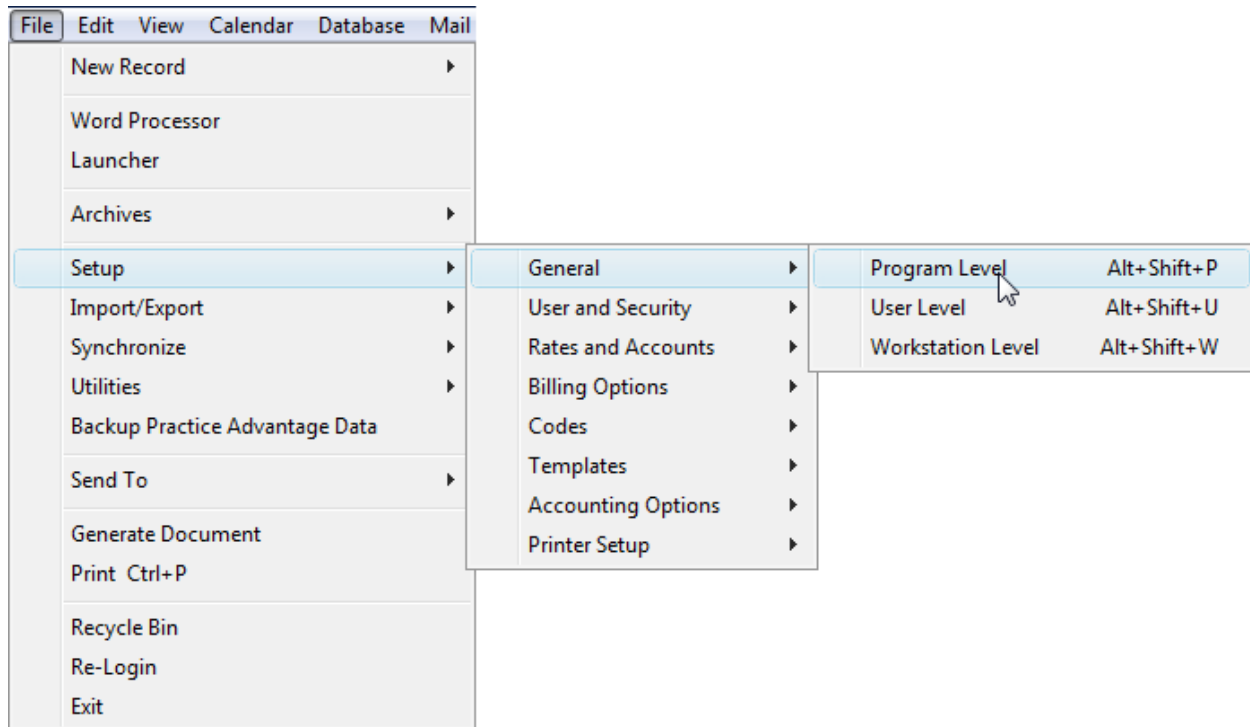


Note: The step above is critical to making this system work. This field matching will cause the Doc Dir designated on the Matter Form to be automatically completed on the Document Form whenever you create a document for that Matter.

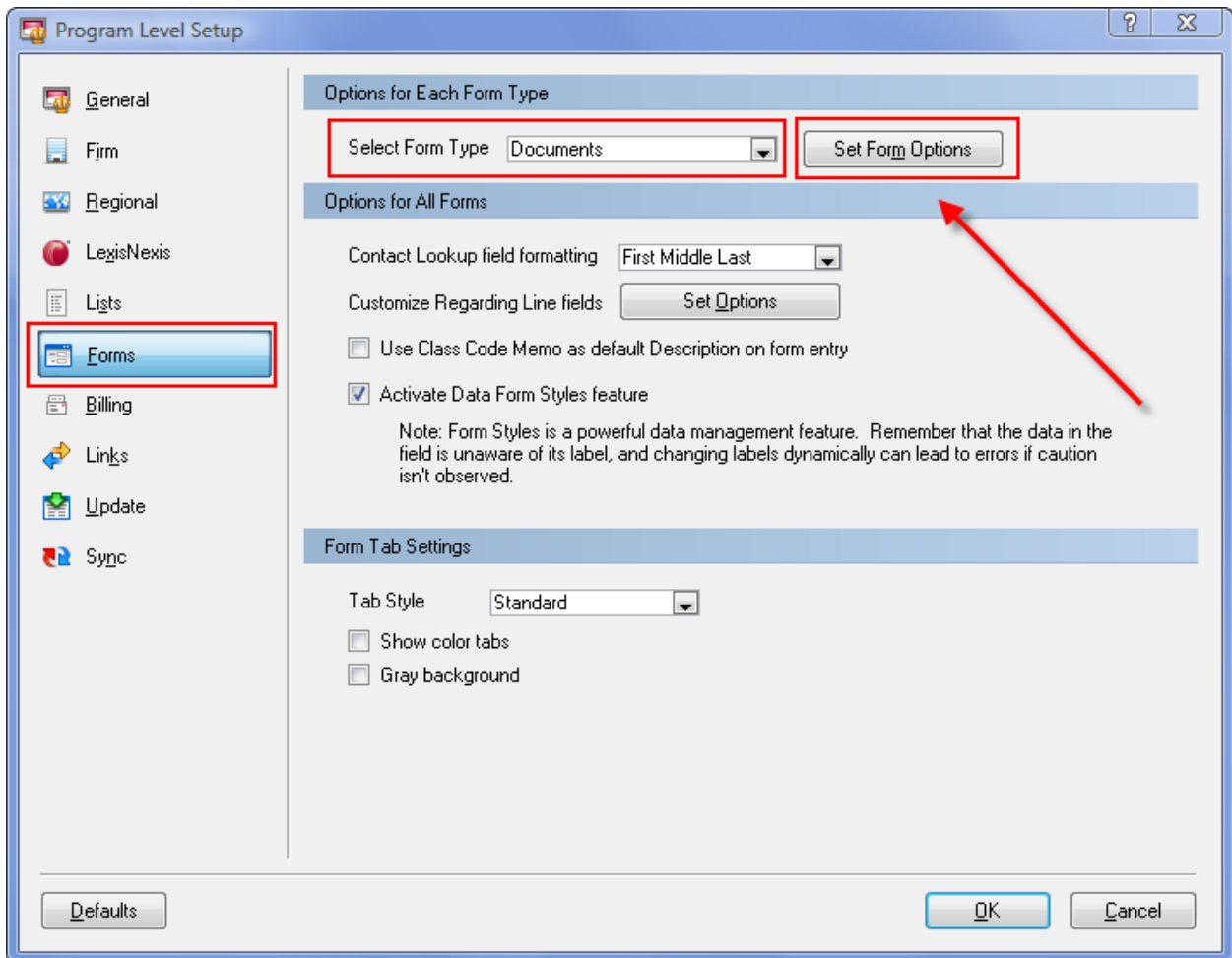
Changes to Program Level Setup

A final series of changes must be made to the Program Level Setup.

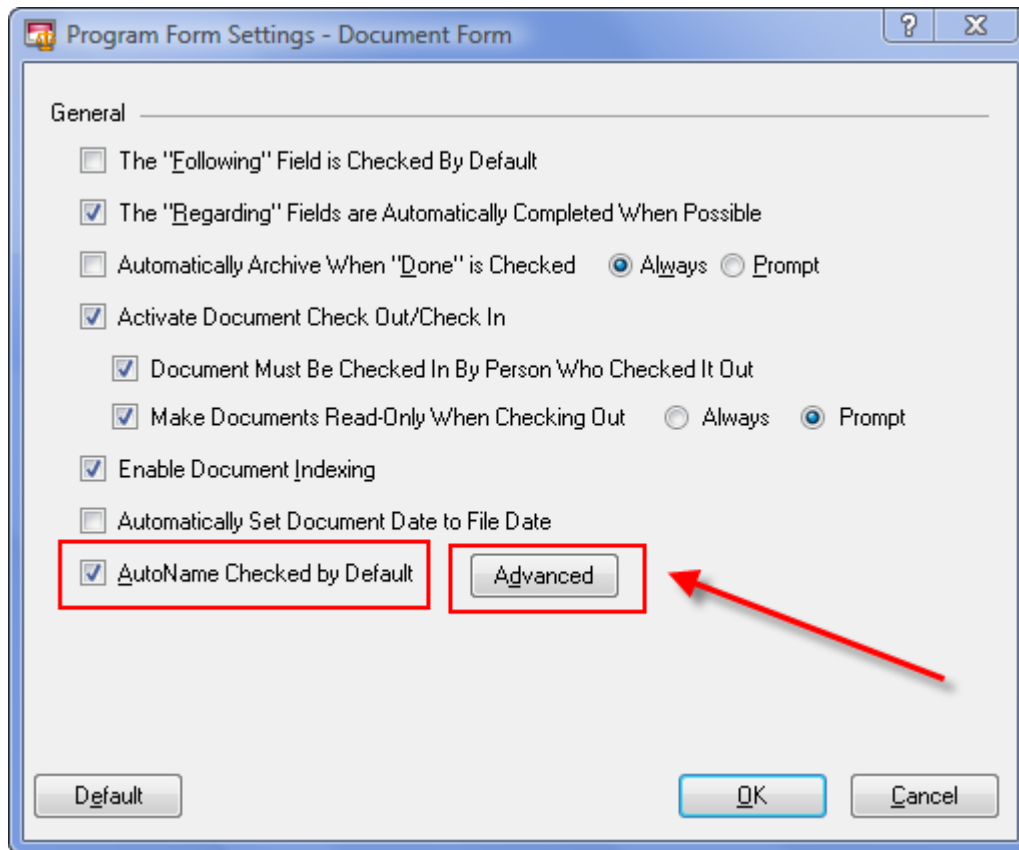
Select the File Menu, Setup, General, Program Level.



Once the Program Level Setup screen is open, select Forms on the far left (Forms tab in versions 8 and earlier). Select Documents from the list of Form Types. Finally, click Set Form Options.

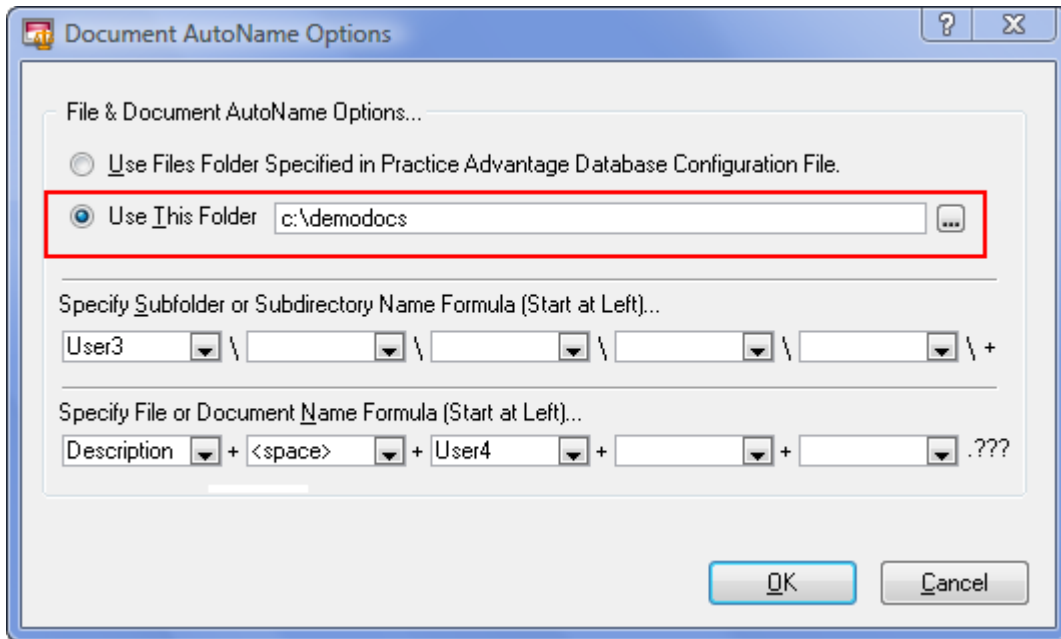


When the Program Form Settings, Document Form appears, make sure that the “Autoname Checked by Default” box is checked, then click Advanced. In earlier versions, this selection is slightly different. There is an AutoName tab at the top of this window.

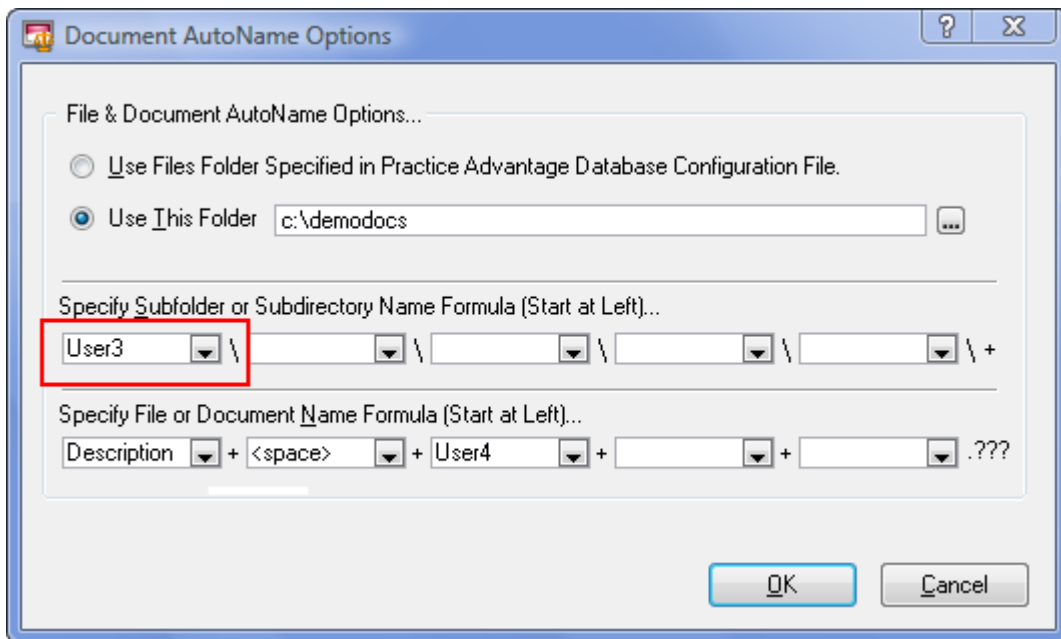


Three sections need to be configured under AutoName Options.

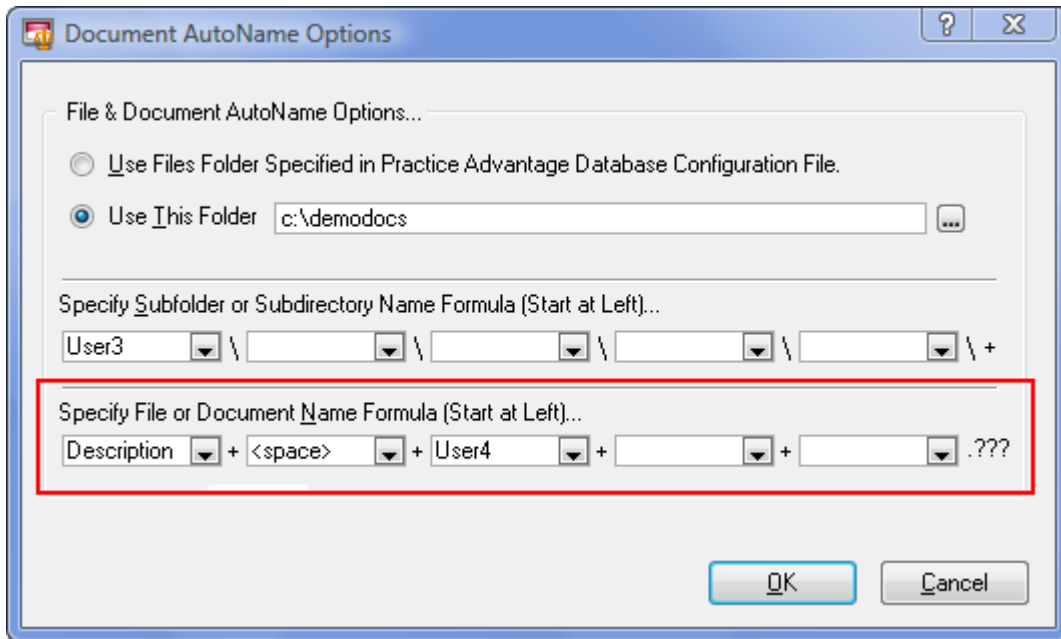
First, select Use This Folder and enter the path to your main document directory. In other words, if you currently save your documents to folder on your server called s:\docs or f:\clientdocs, enter this folder. All Matter document directories will be created beneath this main directory.



The second step is to specify your subfolder formula. Recall that we asked you to remember the field that you configured on the Document Form. This is where you enter it. In our example, we used the third user field.



The final step is to specify a formula for your file name. We highly recommend that you use Description. If you do this, your users can type a document description on the Document Form and the file will be named the same way. Many firms also add a space or hyphen to the file name followed by another user field. Our example shows User4 which we have configured to generate a sequential number. While rarely a problem, this protects against two documents being named exactly the same.



Benefits of this Approach

We recognize that there are different ways to configure document management in Time Matters. Every system has pros and cons but here are a few of the benefits we believe our system provides.

The ability to set a document folder independent of the Matter Reference or Client Name. Our system allows a folder to be created that is shorter and more logical when viewed in Microsoft Windows. A folder structure of s:\docs\Able\Florida is much easier to work with than s:\docs\Barry B. Able\Able v. State of Florida.

Easier to avoid special characters. Because our system allows the user to create a folder that is independent of the Matter name, we avoid issues where a special character (colon, period, forward slash or back slash) conflicts with Windows file naming conventions. With our system, you can still use those characters in your Matter names.

Ability to match to your existing document save system. Our system allows you to enter a save path for a Matter that matches your legacy documents. In other words, if you have been working on Barry Able's file for the last year, you may already have documents in a folder structure such as s:\docs\AbleBarry\FloridaLitigation. Our system allows you to use that same save structure by simply typing AbleBarry\FloridaLitigation into the Doc Dir field on the Matter.