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Getting Started

Sign in Options

1. Start Time Matters using one of the following methods:
   - To log in to the application in Normal Mode, on the Windows Start menu select All Programs > LexisNexis > Time Matters.
   - To log in to the application in Training Mode, on the Windows Start menu select All Programs > LexisNexis > Training Mode - Time Matters.
   - From within the application, to re-login as a different user select File > Re-Login from the menu.

The Welcome window opens.

NOTE If Time Matters opens without displaying the Welcome window, the log in information of the previous user was saved.

2. Do one of the following:
   - Type your Time Matters user ID and password.
   - If Active Directory log in is required, type your Active Directory user ID and password.
3. Optionally, click **Options** for more sign in options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Staff</strong></td>
<td>Select the Staff you want to use in this session. The selected Staff’s records will appear by default on the Calendar and &quot;My [record type]&quot; lists. If a default Staff is assigned to your user ID, you do not need to select a Staff here unless you want to change the Staff whose records appear by default on the Calendar.</td>
</tr>
<tr>
<td><strong>Date</strong></td>
<td>The current date. By default, this date is entered on new records and displayed on the Calendar. Normally, there is no reason to specify a different date than the current date.</td>
</tr>
<tr>
<td><strong>Save This Login</strong></td>
<td>Saves your user ID and password and uses them automatically the next time you start Time Matters. If a different user needs to log in, click the File menu and then click Re-Login to display the login window. Time Matters for Microsoft Outlook will use your saved login by default. This check box is automatically cleared if the Require Program Login Screen option is selected in Workstation Level Setup. <strong>CAUTION: Anyone starting Time Matters on your computer will not be prompted for a user ID or password. The program will start and the user will have access to any part of the program to which you have access.</strong></td>
</tr>
<tr>
<td><strong>Show Reminders</strong></td>
<td>Opens the Alerts and Reminders window after you log in.</td>
</tr>
</tbody>
</table>

4. Click **OK**.

**Start the Application in Training Mode**

Training Mode provides sample data that you can use to practice using Time Matters features. This data is separate from your working database, so you can make any changes you
like without affecting real data.

⚠️ **CAUTION** It is advisable not to enter real data while in Training Mode, unless you have also changed the default user ID and password and set up security features to prevent unauthorized users from using Training Mode to view real data.

1. Start Time Matters using one of the following methods:
   - Double-click the **Training Mode - Time Matters** icon on your desktop.
   - On the Windows Start menu, click All Programs, then click LexisNexis, and then click Training Mode - Time Matters.
2. In the Welcome window, enter TM as the user ID and tm as the password.
3. Click **OK**.
Password Change

This window opens when you are required to change your password upon login.

Security settings might require you to change your password the next time you log in, by a particular date, or on a recurring basis.

Changing your Password when Prompted

When you sign into Time Matters, you may be prompted to change your password if this is your first time signing in, or if your password is nearing expiration.

To change your password when prompted:

1. In the Old Password field, type your current password.
2. In the New Password field, type a new password.
3. In the Confirm Password field, type the new password again.
4. Click OK.

The next time you sign into Time Matters, enter the new password.

Changing your Password

If security settings allow you access to the User Form, you can change your password at any time.

To change your password:


   The Security Setup - List of Users window opens.
2. Double-click your user ID in the list.
   The Security Setup - User Form window opens.
3. Type a new password in the **Password** and **Confirm** boxes.
4. Click **OK**.
Use the Navigator to Open Program Features

The main Navigator window displays a customizable list of navigators available to the current user. Navigators are a convenient way to group sets of commonly used application features and access them all from a single location. Navigators can also be designed to show processes and workflows for your organization.

Use the Navigator window to access many application features from one location.

Each tab along the left side of the window provides buttons for a collection of related tasks.

To use Navigators:

1. Select **View > Navigator** from the menu, or press **CTRL+N**.
   The Navigator opens.

2. Click a navigator button to go directly to the program feature associated with that button.

3. Click the tabs on the left side of the Navigator window to view different navigators.

4. (Optional) To customize the list of tabbed navigators available in the Navigator window, click the **Options** button on the top of the Navigator title bar.

RELATED TOPICS

- Creating Custom Navigators
- Navigator Options
- Navigator Designer
- Adding Buttons to the Navigator
- Navigator List
- Custom Link
- Navigator Choice
View a List of Records

Each record type (such as Contacts, Matters, and Documents) has a main record list. The list is often the most convenient place to locate specific records and view summary information about them. Although most types of record lists can be accessed from the Database menu, others are accessed from other menus.

To view a list of...

- **Contacts**: Click the Database menu, point to Contact List, and click All Contacts.
- **Matters**: Click the Database menu, point to Matter List, and click All Matters.
- **Events**: Click the Calendar menu, point to Event List, and click All Events.
- **ToDo’s**: Click the Calendar menu, point to ToDo List, and click All ToDo’s.
- **Documents**: Click the Database menu, point to Document List, and click All Documents.
- **Notes**: Click the Database menu, point to Note List, and click All Notes.
- **Email**: Click the Mail menu, point to Email List, and click All Email.
- **Mail**: Click the Mail menu, point to Mail List, and click All Mail.
- **Phone Calls**: Click the Database menu, point to Phone Call List, and click All Phone Calls.
- **Billing Items**: Click the Billing menu, point to Billing Item List, and click All Billing Items.
- **Custom Forms**: Click the Database menu, point to Custom Form List, and click All Custom Forms.
- **Lexis Research Records**: Click the Database menu, point to Lexis Research, and click All Lexis Research.
- **Outlines**: Click the Database menu, point to Outline List, and click All Outlines.
- **User Defined Records**: Click the Database menu, point to <user defined name> List, and click All <user defined name> Types.
Sort Records by Column Headers

A sort feature has been added to the Contact Timeline, Matter Timeline, and the Attachments List that allows you to sort records by the column headers, in ascending or descending order. By using this sort feature, the information you are looking for can be more readily accessible. Below are example sorts from the Attachments List. The first is an example of the records sorted by Date, the second is an example of those same records sorted by Time.

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/20/2013</td>
<td>Tue</td>
<td>10:37 am Judgment to Recover NC</td>
</tr>
<tr>
<td>8/20/2013</td>
<td>Tue</td>
<td>7:21 am Baird Meeting Letter</td>
</tr>
<tr>
<td>10/31/2013</td>
<td>Thu</td>
<td>4:16 pm Shah Meeting Letter</td>
</tr>
<tr>
<td>10/31/2013</td>
<td>Thu</td>
<td>5:01 pm Castorino Fax Cover</td>
</tr>
<tr>
<td>12/26/2013</td>
<td>Thu</td>
<td>3:33 pm Reminder of Upcoming Motion</td>
</tr>
<tr>
<td>12/26/2013</td>
<td>Thu</td>
<td>11:26 am Faxcover</td>
</tr>
<tr>
<td>12/26/2013</td>
<td>Thu</td>
<td>9:45 am Shelby Letter</td>
</tr>
<tr>
<td>12/26/2013</td>
<td>Thu</td>
<td>10:08 am Client Letter</td>
</tr>
<tr>
<td>3/03/2014</td>
<td>Mon</td>
<td>1:18 pm Jefferson Hospital Request</td>
</tr>
<tr>
<td>3/03/2014</td>
<td>Mon</td>
<td>7:07 pm Hernandez Enclosure Letter</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/18/2014</td>
<td>Wed</td>
<td>8:45 am Hopkins PT reminder</td>
</tr>
<tr>
<td>12/26/2013</td>
<td>Thu</td>
<td>9:45 am Shelby Letter</td>
</tr>
<tr>
<td>5/15/2014</td>
<td>Thu</td>
<td>9:43 am Jones Hearing Letter</td>
</tr>
<tr>
<td>6/18/2014</td>
<td>Wed</td>
<td>9:54 am Baxter Contact Letter</td>
</tr>
<tr>
<td>6/18/2014</td>
<td>Wed</td>
<td>9:59 am Czerniinski SOL Letter</td>
</tr>
<tr>
<td>12/26/2013</td>
<td>Thu</td>
<td>10:08 am Client Letter</td>
</tr>
<tr>
<td>8/20/2013</td>
<td>Tue</td>
<td>10:37 am Judgment to Recover NC</td>
</tr>
<tr>
<td>5/15/2014</td>
<td>Thu</td>
<td>11:02 am Request for Records at St. Lui</td>
</tr>
<tr>
<td>12/26/2013</td>
<td>Thu</td>
<td>11:26 am Faxcover</td>
</tr>
</tbody>
</table>

To sort the records, simply click on the column header of the column you wish to sort by. You can toggle between ascending and descending order by clicking on the header again.
Locate a Record on a List

Time Matters provides several ways to locate a specific entry on a record list. Two simple methods are using QuickPik and the Search box on the list toolbar.

QuickPik

To use QuickPik:

1. Click the header of the column you want to search on.
2. Type the first few characters of the word or number you want to find.
   The record that most closely matches what you are typing will be highlighted in the list.

Search Box

To use the Search box:

1. Click inside the Search box on the list toolbar.
2. Type a word, name, or number associated with the record you want to find.
3. Press ENTER.
   The list will be filtered to display only records that match the text you typed.
Clients and Matters
View a Matter

1. Do one of the following to open the Matter list:
   - Click the **Matters** button on the main toolbar.
   - Select Database > Matter List > All Matters from the menu.
   - Press **F6**.

2. Highlight the Matter you want to view.
   
   Summary information about the Matter appears in the Power View area of the list.

3. To open the full Matter record, double-click the Matter in the list.
Add a Matter

You can add a Matter using the New Matter Intake wizard or using the Matter form.

Add a Matter Using the New Matter Intake Wizard

1. Do one of the following:
   - Press **Ctrl+Shift+A**.
   - Select File > New Record > Matter from the menu.
   - On the Matter list, click the Add button.

The New Matter Intake Wizard opens.

[NOTE] If the wizard is disabled, the Matter form opens instead.

2. Select Person if the Contact is an individual person, or select Organization if the Contact is a group, organization, business, etc.

   This selection determines which options appear on the second page of the wizard.

3. In the MatterRef box, type a name for the Matter.

4. In the MatterNo box, type a number for the Matter.

5. In the Code box, click the arrow and select the classification code that best describes what kind of Matter you are creating.

6. On each page of the wizard, enter the information you have about the Matter and click Next.
7. On the last page of the wizard, click Finish.

Add a Matter Using the Matter Form

1. If the New Matter Intake wizard is enabled, disable it:
   a. Select File > Setup > General > User Level from the menu.
   b. On the General tab of the User Level Setup window, clear the Matter check box in the Wizard Defaults area.
   c. Click OK.

2. Do one of the following:
   - Press Ctrl + Shift + A.
   - Select File > New Record > Contact.
   - On the Matter list, click the Add button.
   The Matter form opens.

3. In the MatterRef box, type a name for the Matter.

4. In the MatterNo box, type a number for the Matter.

5. In the Code box, click the arrow and select the classification code that best describes what kind of Matter you are creating.

6. In the remaining areas of the Primary, Secondary, and Additional tabs, enter other information about the Matter.

7. Click the Save & Close button.
Associate a Contact with a Matter

When two records are associated with each other, they are referred to as related records.

You can relate a Contact to a Matter by opening the Contact record and entering the name of the Matter in the MatterRef box, or the Matter number in the MatterNo box.

You can relate a Matter to a Contact by opening the Matter record and entering the Contact in any box that accepts a Contact. (If the Contact you are relating is the client for whom the Matter was created, enter that Contact in the Client box.)

Other kinds of records can also be related to each other. The most common way to relate records is to assign them to the same Client and/ or Matter. On the record form, enter the Client and/ or Matter in one of the boxes on the Regarding line. (When you click a Regarding line box, the label "Regarding" changes to indicate the box you have selected: either MatterRef, MatterNo, Client, or ClientNo.)
Documents
Document Records

When you add a file or document to Time Matters, a Document record is created. The Document record stores information about the file, including:

- The location of the file
- The Contact and/or Matter related to the file
- The Staff(s) assigned to the document
- A history of document versions

NOTE A Document record is not the same thing as the file or document it refers to. The Document record is a set of information about the file or document. You can delete or change the Document record without affecting the document itself.
Save a Document to Time Matters from External Application

The Time Matters Save (or TM Save) button appears on the toolbar or ribbon of supported third-party applications, including Microsoft Word, Excel, PowerPoint, and Internet Explorer, Corel WordPerfect, and Adobe Acrobat and Reader.

If the button does not appear on your application’s toolbar:

1. In Time Matters, select **File > Setup > General > Workstation Level** from the menu.
2. Click the **Word Processor Setup** button or the **Additional Program Setup** button, depending on the type of third-party application you want to use.
3. Select the check box beside the application version for which you want to install the TM Save button.
4. Click **OK**.
5. Click **OK** to close the Workstation Level Setup window.

To save a document to Time Matters:

1. In the supported third-party application, click the **TM Save** or **Time Matters Save** button on the toolbar or ribbon.
2. If you are not already logged in to Time Matters, the login window opens. Sign into Time Matters.
   The Time Matters Document form opens.
3. Enter information about the document on the form. It is recommended that you enter a Matter and/ or Contact on the Regarding line, and complete the following fields: **Code**, **Description**, and **Staff**.
4. Click **Save & Close**.
Create a Document by Merging Time Matters Record Information

Before you begin, you will need a merge template for the kind of document you want to create.

To view a list of merge templates:

1. In Time Matters, select **File > Setup > Templates > Merge**.
2. The List of Merge Templates window opens.
3. In the **Record Type** box, select the type of record whose information you want to merge into a document.
   
   The window displays your existing merge templates for the selected record type.

To create a merge template:

If the kind of merge template you want does not appear, you will need to create a new template.

1. In Time Matters, select **File > Setup > Templates > Merge** from the menu.
   
   The List of Merge Templates window opens.
2. In the **Record Type** box, select the type of record whose information you want to merge into a document.
3. Click the **Add** button.
4. Select **Program Level** if you want the new template to be available to all Time Matters users, or select **User Level** if you want the template to be available only to you. Click **OK**.
   
   The Merge Template Setup window opens.

5. In the **Description** box on the Settings tab, type a description of the template.
6. Click the **Fields** tab.
7. Select each record field you want to make available in the merge and click Add to move it to the In Merge Data File list.

8. Click the Files tab.

9. In the Enter Complete Path and File Name box, enter the directory path and file name you want to use for the new template.

10. Click the Create or Open Merge Form Field button.

Your word processing application opens.

11. Type the form letter (or other merge document) as you want it to appear.

12. Click the Insert Merge Fields icon on the word processor toolbar.

The Insert Field Name or Number window opens.

13. Select a field and click Insert to place it in the document at the cursor location. Repeat this for each field you want to include in the document.

14. Click Close to close the Insert Field Name or Number window.

15. Click Save and close or minimize your word processor.

16. On the Merge Template Setup window, enter the path and file name in the Specify Merge Output File box.
17. Select the **Prompt for File Name When Merging** check box.

18. Click **OK** to close the Merge Template Setup window.

To merge information from Time Matters into a document:

1. In Time Matters, tag the record(s) whose information you want to merge by clicking the check box beside the record(s) in a list.

2. Select **Process > Merge Records** from the main menu.
   The Select Merge Template window opens.

3. Double-click the merge template you want to use.
   The Merge File Names window opens.

4. In the **Create Merge Output File Named** area, enter the name and location of the output file.

5. Click **OK**.
Add a Document to Time Matters

There are several ways you can import an existing document or file into Time Matters. This action creates a Document record for that file.

**To add a single document**

There are several different ways you can add a document to Time Matters.

- **Add a Document record.** Start in Time Matters and open a new Document record. From the record form, you can browse to the file you want to attach, add other necessary data to the form, and then save the record.

- **Send to Time Matters.** Right-click a file in Windows Explorer and select **Send To > Time Matters.**

- **Time Matters Save** (TM Save). While in certain external applications, you click **TM Save** to send the open document to Time Matters. TM Save is a plug-in that may be installed with Time Matters, and is available for versions of Microsoft Word, Excel, PowerPoint, Adobe Acrobat, and Adobe Reader.

**To add multiple documents:**

- **Send to Time Matters.** Select multiple files in Windows Explorer, right-click, and then select **Send To > Time Matters.**

- **Document Search.** After completing a Document Search, tag the results, and click **Process > Create Document Profile Records.**
Save a Document to Time Matters from External Application

The Time Matters Save (or TM Save) button appears on the toolbar or ribbon of supported third-party applications, including Microsoft Word, Excel, PowerPoint, and Internet Explorer, Corel WordPerfect, and Adobe Acrobat and Reader.

If the button does not appear on your application’s toolbar:

1. In Time Matters, select File > Setup > General > Workstation Level from the menu.
2. Click the Word Processor Setup button or the Additional Program Setup button, depending on the type of third-party application you want to use.
3. Select the check box beside the application version for which you want to install the TM Save button.
4. Click OK.
5. Click OK to close the Workstation Level Setup window.

To save a document to Time Matters:

1. In the supported third-party application, click the TM Save or Time Matters Save button on the toolbar or ribbon.
2. If you are not already logged in to Time Matters, the login window opens. Sign into Time Matters.
   The Time Matters Document form opens.
3. Enter information about the document on the form. It is recommended that you enter a Matter and/ or Contact on the Regarding line, and complete the following fields: Code, Description, and Staff.
4. Click Save & Close.
Send Files to Time Matters from Windows Explorer

You can create Document Records by selecting one or more files in Windows Explorer and using an option on the context menu.

1. In Windows Explorer, select one or more files. Right-click the selection and select Send to > Time Matters on the context menu.

   The Create Document Profile Records window opens.

2. Enter information for the document(s) and click OK.

3. If you selected the option to preview each Document record, the records will open one at a time, and you must click Save & Close each time (after adding any additional information needed).
Import a Document Using the Document Form

You can bring an existing file or document into Time Matters using the Document form.

1. On the Document record list, click the Add button.
2. In the File Name box, specify the name and location of an existing file.
3. Enter additional information about the file. It is recommended that you enter a Matter and/ or Contact on the Regarding line, and complete the following additional boxes: Code, Description, and Staff.
4. Click the Save & Close button.

Formattable Clipboards: Create a Document Using Information Copied from a Record

The Formattable Clipboard lets you copy information from multiple record fields and then paste the information into a document in a preconfigured format. For example, instead of individually copying and pasting each address field on a Contact form, you can define a Formattable Clipboard that copies all the address fields and pastes them in a correctly formatted block. You can even create a form letter and automatically insert selected information from a Contact.

To create a new document using the Formattable Clipboard:

1. On the Document record list, click the Add button.
   The Document form opens.
2. Enter information about the record on the form. It is recommended that you enter a Matter and/ or Contact on the Regarding line, and enter information into the following additional fields: Code, Description, and Staff.
3. In Area 4 of the form, click the Generate button and the Clipboard button.
4. Select a record from which to copy data to the clipboard:
   a. Click the Data Source button.
   b. In the Select Record Type box, click the arrow and select the type of record.
   c. Click the Add button to open a list of records.
d. Select the record whose information you want to copy.
e. Click OK.

5. Select a clipboard template to use. This defines how the copied information will be formatted when it is pasted into the document:
   a. Click the Template button.
   b. In the left pane, select the application you want to open to create the document.
   c. In the right pane, select the clipboard format you want to use.

6. Click the Create button.
   The application associated with your selected template opens.

7. To paste the information in the clipboard press **CTRL+V** or click the Paste button on the toolbar or ribbon.

8. Save the document when you are finished.
Calendar

New Calendar Design

The Time Matters 14 and newer software includes a new, single, and unified calendar, with a familiar look and feel, to help you plan your day and meet important client deadlines.

New calendar functionality includes:

- An additional 'Work Week' view that allows each user to customize the number of days and the days that make up their work week
- Drag and drop capabilities to change event dates/times and task dates on the Daily and Work Week views
- Automatic detail view to see multiple calendars side by side (Daily and Work Week views only)
- Ability to use Shift or Ctrl keys (instead of check boxes) to tag/select multiple records
- Event headers and descriptions are now displayed
- The color of event and todo headers are now displayed on the Daily, Work Week, Weekly and Monthly views
- Special dates now work like all-day events, where the entire day is grayed out

Work Week View and Detail View

Work Week View

You can configure the calendar to show the days in the week you will be in the office using the Work Week view.

To set the days that will appear on the Work Week view of the calendar:

1. Click the **Calendars** button to open the calendar.
   
   Alternatively, you can select **Calendar > Work Week Calendar** (or any of the other views) from the menu bar to open the calendar.

2. Click **Edit > Display Options**.
   
   The Calendar Display Options window opens.
3. On the **Daily/Detail/Work Week** tab, select days you want to appear in your Work Week view, and then click **OK**.

**TIP** To see your changes, open the Work Week calendar by clicking on the **Work Week** tab in the Calendar window. Your changes take affect immediately.

**Detail View**

You can configure your calendar to show details for different staff members when using the daily view and Work Week view.

**To set your Daily or Work Week calendar in Detail view:**

1. Do one of the following:
   - From the Calendar menu, click **Detail View Calendar**.
   - Click the **Calendars** button to open the calendar, and then click the **Detail View** button.

   Alternatively, you can select **Calendar > Work Week Calendar** (or any of the other views) from the menu bar to open the calendar.

2. Click either the **Daily** or the **Work Week** tab to open that calendar view.

The selected calendar displays.
3. Use one of the methods below to select the date or date range you want to view.
   - Click the date/date range arrows to select the date or date range you want to view.
   - In the GoTo box, type or select the date, or a date that falls within the work week range.
   - In the Reference Calendar look up, click on a date, or a date that falls within the work week range you want to view.

4. Click the Staff look up bar to open the pane, if it isn’t already open.

5. Click each staff member or group check box to display them in the calendar view.
   Each staff’s calendar displays in a separate column.

Set Daily or Work Week Calendar to Display Multiple Staff Members

Color Code Calendar Items
You can configure Time Matters to apply color to calendar events based on any of the following rules:

- Apply color code based on assigned classification code.
- Apply color code based on assigned staff.
- Apply color code based on assigned matter.
- Apply the same color to all events, regardless of other assignments.
- Clear color coding from all events.

These options are described in the following sections.
Apply the same color to all events or clear color from all events

You can apply a single custom color or clear all colors from events in the calendar.

To change or clear a custom color for all calendar events:

1. Click the **Calendars** button on the toolbar, to open the Calendar window.

2. Click the **Options** button.

   The Calendar Display Options window opens. The **Daily/Detail/Work Week** tab is selected.

3. On the **Header Color** list, do one of the following:
To assign a custom color to all events, select **Custom**, then click **Set Color**, select a color, and click **OK**.

To clear a previously selected custom color, select **None**.

4. Click **OK**.

**Color Code Matters**

**To color code a Matter:**

1. Click **Matters**.  
The Matters list opens.

2. Double-click the matter you want to color code.  
The Matter Form - Change window opens.
3. Click the Select Color button on the toolbar.
   A color picker opens.
4. Click the color you want to use, or create a custom color using the Define Custom Colors button.
5. Click OK to select the color and close the picker.
   You are returned to the Matter Form - Change window.
6. Click the Save & Close button on the toolbar to close the matter.
   Now all events and todo’s that are associated with the matter (via the regarding line) display the same color. The color is also applied to all staff members who are selected to show on the calendar.

Tag or Select Multiple Records in the Calendar

Unlike other areas within Time Matters, the calendar does not use check boxes for tagging/selecting multiple records to perform a single action on. In the calendar you use the Control or Shift keys to tag/select the records.

To tag/select multiple records in the calendar:

1. Click the Calendars button to open the calendar.
   Alternatively, you can select Calendar (and any of its views) from the menu bar.
2. Click calendar view tab of the calendar you want to view.
The selected calendar displays.

3. Use one of the methods below to select the date or date range you want to view.
   - Click the date/date range arrows to select the date or date range you want to view.
   - In the GoTo box, type or select the date, or a date that falls within the work week range.
   - In the Reference Calendar look up, click on a date, or a date that falls within the work week range you want to view.

4. Hold your Ctrl key down while clicking on each of the records you want to tag/select.

To tab/select multiple records that synchronously follow one another, hold your Shift key down, click on the first record in and then click on the last records - this action tags/selects all records between the two records you clicked on, including those two records.

Once you have tagged/selected all the records you want, you can perform the action you want to take on those records.

**Events and ToDo's**

Events and ToDo's are similar, but have important differences:

- An Event has both a date and a time. Event records are like appointments.
  
  They typically represent meetings, hearings, trials, and other events that occur at a particular time of day.

- A ToDo has a date but no time.

  ToDo records are like tasks, as they must be completed on or by a date, but not necessarily by a particular time on that date (although it is typical for the task to be due by the end of the day). Such tasks might include writing a letter, doing research, or filing documents.

- On the daily calendar, Events and ToDo's appear in different areas of the window.
Add an Event to the Calendar

To add an event to the Calendar:

1. Do one of the following:
   - Press Ctrl+Shift+V.
   - On the File menu, point to New Record and click Event.
   - On the Daily or Work Week Calendar, double-click a time in the Events area.
   - On the Weekly or Monthly Calendar, right-click a date and select Add Record on the context menu. On the Add New Record window, select Event Record and click OK.
   - On the Events list, click the Add button.

   The Event form opens.

2. Complete the Date and Time boxes, which are required.

3. In the Code box, click the arrow and select the classification code that best describes what kind of Event you are creating.

4. On the Regarding line, enter the Contact and/or Matter related to the Event.

5. In the other areas of the Primary tab, enter other information about the Event.

6. Click the Save & Close button.
Communications
View Email

Each Time Matters user (not Staff) has a personal inbox for email sent to their account.

- Select Mail > Personal Inbox from the menu.

You can also view email that has been moved from your personal inbox to the Email list.

- Select File > Email List > All Email from the menu.
Create and Send Email

**To create and send email:**

1. Click the Mail menu and then click Personal Inbox.
2. Click the New button on the Inbox toolbar.
   
   An Email record form opens.
3. Complete the Subject box.
4. If the email is regarding a Contact or Matter, enter that Contact and/or Matter in the boxes on the Regarding line.
5. In the To box, type the addresses of the email recipients. You can also click the lookup button beside the box to select recipients from among Contacts, Staff, and distribution lists.
6. In the Message area, type the message you want to send.
7. To attach a file, do the following:
   
   a. Click the Attachments button.
   
   b. Click the arrow beside the Add button.
   
   c. Select File or TM Document, depending on how you want to identify the attachment.
   
   d. Locate and select the file(s) you want to attach.
8. When you are ready to send the email, click the Send button on the Email form toolbar.
Send Instant Messages to Other Time Matters Users

To send instant messages to other Time Matters users:

1. Click the View menu and then click Messenger Window.
   The Messenger opens.
2. Click the Add button.
   The Message form opens.
3. Click the lookup button beside the To box to select a Time Matters user as the recipient of the message.
4. Type your message in the Message area.
5. If you want to flag the message as urgent, click the Urgent button.
6. Click Send when you are ready to send the message.
How Do I Create a New Phone Record?

As a call is made, received, or scheduled, a Phone record can be completed using the Phone Call Form. You can plan to make a phone call at a later time and date and even set an Alarm to remind you to make the call. These records can be added, changed, or deleted from the Phone Calls List in Time Matters.

To create an new phone record:

1. Do one of the following:
   - Press Ctrl+Shift+P.
   - Press the F8 Hot Key.
   - Select File > New Record > Phone Call.
   - Click the Add button on the Phone Calls list.

2. Complete the Date and Time boxes, which are required.

   The "Date" and "Time" fields are required entries when creating a new Phone record. These fields are automatically entered based on the current date and time. Other fields are optional and may be completed at a later time, but it is recommended that you complete the Subject, Out To/In From, and the From/To fields for record tracking purposes.

3. In the Code box, click the arrow and select the classification code that best describes the nature of the phone call.

4. On the Regarding line, enter the Contact and/ or Matter related to the phone call.

5. If the record is for an incoming call, enter the name of the caller or click the lookup button to select from a list of Contacts.

6. If the record is for an outgoing call, click the In From button to toggle the label to Out To. Then enter the name of the recipient or click the lookup button to select from a list of Contacts.

7. In the other areas of the Primary tab, enter other information about the phone call.

8. Click the Save & Close button.
Reports
Print a Standard Report

1. Click the Report menu and then click Standard Reports.

   The Standard Reports window opens.

2. Select the tab related to the type of report you want to print: Billing, Transactions, Tax, Staff, or Setup.

3. Select the report level: Program, User, or both Program and User.

4. On the Format tab, select the report you want to create.

5. On the Filter tab, select the criteria a record must meet to be included in the report.
   (These options are different for each report format.)

6. On the Options tab, select any additional report options you want. (These options are different for each report format.)

7. Click the Printer button.

   The Print window opens.

8. Select the printer you want to use and set other print options.

9. Click OK to print the report.
Export a Record List as an Excel Spreadsheet

To export a record list as an Microsoft Excel spreadsheet:

1. Open the list you want to export.
2. Right-click the list toolbar and select Edit Columns.
   The Edit List Fields window opens.
3. Ensure that the In List box includes the columns you want to include in the spreadsheet, ordered the way you want. Select the name of a column in the Available Fields box and click the Add button to move it to the In List box. Select the name of a column in the In List box and click the Up or Down button to move it earlier or later in the list. Columns earlier in the list appear closer to the left.
4. Click OK.
5. Optionally, click the Search button on the list toolbar and enter search criteria to filter the list to show only the records you want to include in the spreadsheet. Click OK.
6. Click the Send to Excel button on the list toolbar.
   (If the button does not appear on the toolbar, click the Options button to open the List Options window, select the List Toolbar tab, select Send to Excel in the Available Buttons box and click Add to move it to the Show on Toolbar box. Click OK to save your changes.)
   The list is exported to an Excel spreadsheet.
Time and Billing
Create a Timesheet
Set up Basic Billing

**To set up basic billing:**

1. Select File > Setup > General > Program Level from the menu.
2. Click the **Links** tab and the **Billing** sub-tab. (If the Billing sub-tab does not appear, click the main Billing tab and ensure that the Activate Billing Matters check box is not checked.)
3. Click the Activate Billing check box.
4. Select Basic Billing in the Select Billing Link drop-down list.
5. Click the Set Billing Options button. The Time Matters Billing Setup window opens.
6. Set options on the General tab:
   a. Select whether to bill by Contacts, Matters, or Contacts and Matters.
   b. Type the number to use for the first (or next) invoice you create in the Next Invoice Number box.
   c. Select Allow changes to Billing Form if you want to enable customization of Billing forms.
   d. Select Allow Time Matters Records to be billed more than once if you will allow records to be billed multiple times.
   e. Select Allow Billed Records to be on more than one Time Matters Invoice if you will allow billed records to show on more than one invoice.
7. Click the Rates tab to add or modify rate tables.
8. Click the Setup tab to modify additional billing options, such as setting a global rate for your business, a default billing basis, and a default rate level.
9. Click the Address tab to select the fields used to complete the Bill To area of invoices.
10. Click OK to close the Time Matters Billing Setup window.
11. Click OK to save your changes and close the Program Level Setup window.
12. Select File > Setup > General > User Level to activate billing for each user that will need access to the billing functions.
13. Select a user from the drop-down list in the top left corner of the User Level Setup window.
14. Click the Links tab and the Billing sub-tab.
15. Select the Activate Billing check box and click the Set Billing Options button. The Time Matters Billing Link Options window opens.

16. Select whether to use Program Level settings or to specify individual user settings for the available options.

17. Click OK to close the Time Matters Billing Link Options window.

18. Click OK to save your changes and close the User Level Setup window.
Print a Prebill

1. On the Billing menu, click Print Pre-bills.
   The Print Pre-bills window opens.

2. On the Matter tab, select criteria to include pre-bills for specific Matters.
3. On the Charges & AR tab, set options to define how work-in-progress will be filtered.
4. On the Options tab, select options to broaden or narrow the filter of items for which pre-bills will be printed.
5. On the Include tab, define information that will not be printed on the bill.
6. Click Print. The printed copies can be distributed for review.
Create a Bill

To create a bill:

1. Select Billing > Create Bills.
   The Create Bills window opens.

2. From the Matter tab, click the Matter No. lookup button (or Contact No. lookup button) to find client records ready for billing.

   ![NOTE] Essentially, each of the four tabs serve as a filter to create bills you want to produce.

3. Click the Charges & AR tab.
   The Charges & AR window opens.

4. Complete the required information specific to work in progress.
   This information acts as an additional filter after the Matter filter is applied.

5. Click the Options tab.
   The Options window opens.
   Select from Options and Bill Layout to broaden or narrow the filter further.

6. Click the Printer tab.
   The Printer window opens.

7. Make printer choices.

8. (Optional) Click Preview to view.

9. Click Print to print bills or click Close.
Post or Undo a Bill

1. Select Billing > Post or Undo Bills from the menu.

   The Post or Undo Bills window opens.

2. Tag the bills you want to post or those that you want to undo.

3. Click the Post button to post the tagged bills, or click the Undo button to undo the tagged bills.
Juris Link
Integration with Juris® Software

A 'Juris' tab has been added to the Time Matters Contact and Matter forms for linking between Time Matters and Juris. This tab takes the place of the Custom 7 field in Area 5 of the Contact and Matter forms for linking records with the Juris application. Data from all existing records linked with Juris will be automatically moved to the Juris tab. To link a record with the Juris application, click on the Juris tab in the Contact or Matter form, and enter the Client Code. Please see the Online Help for more information.

This integration of the Time Matters and Juris software applications has safeguards to ensure accurate data synchronization between the two products. These safeguards:

- Eliminate the creation of duplicate client and matter records in the Time Matters software when the information in the client’s or matter’s Juris record is changed
- Take time and expense entries entered into the Time Matters software and marks them with a 'Draft' status in Juris Suite where Juris Suite compliance rules can be applied

### NOTE
The Time Matters 14 software and newer require that you have Juris Suite 2.6.x or newer software installed if you wish to link the two programs.
PCLaw Link
PCLaw Link Overview

With the PCLaw link, you can easily capture the billable hours you spend working in Time Matters and send that information to PCLaw for billing.

Before you Install

Do the following before you set up the PCLaw link:

- Back up your Time Matters 16.4 database.
- Back up your PCLaw database.
- If necessary, set up the PCLaw Remote Client Server. This is necessary if the full PCLaw client (version 9.30 or later) is not installed on each computer where the PCLaw link will be used.

To back up your Time Matters database:

1. In Time Matters, go to File > Backup Time Matters Data.
   
   The Time Matters Backup window opens.
2. Optionally, specify a different backup file name in the Shared Files Backup field.

3. Optionally, select the types of files (documents and email attachments) that you want the backup to skip.

4. Click OK.

   The Begin Server Backup Now window opens.

5. Click Yes. When the SQL database backup is complete, the Server Backup Completed window opens.

6. Click OK.

   The Begin Backup Now window opens.
7. Click Yes.
8. When the process is complete, click OK to close the window.

**NOTE** Time Matters SQL database backups are stored in a different location than backups of Time Matters document and email files. The default location of SQL backup data is:
C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup

**To back up your PCLaw database:**

1. In PCLaw, go to **File > Backup/Restore > Backup Data**.
   A message window opens, reminding you to ensure that you are the only user running PCLaw. If other users are running PCLaw, wait until they have exited PCLaw before proceeding.
2. Click **Yes** to continue.
3. If a window opens displaying a message about what information is included in the backup, click **OK** to close the window and continue.
   The PCLaw Archive - Export File window opens.
4. Select a location to save your backup file, and enter a file name.

**NOTE** It is recommended that you include the current date in the file name, for easy identification and to avoid overwriting older backup files.

5. Click **Save** to create the backup file.

**To set up the PCLaw Remote Client Server:**

Perform these steps on a computer with the full PCLaw client installed and with network access to other computers that will use the Remote Client.

1. Create a shared folder on the computer. This folder will be used by remote clients to send requests to PCLaw.

**NOTE** A good idea is to create the shared folder within the existing PCLaw data path, such as:
\\computerName\PCLaw Data\Data\Remote
2. Close all open applications on the computer.

3. In PCLaw, go to **Options > Connection Settings**.
   
   The Connections Settings screen opens.

4. Select the **Use This Set of Books when Connecting with Other Programs** check box.

5. Click **Configure Remote Server Settings**.
   
   The PCLaw Remote Client Server Configuration Utility screen opens.

6. Enter the full path to the folder you set up in step 1.

   **NOTE** Use Universal Naming Convention syntax. For example, \\computerName\PCLaw Data\Data\Remote

7. Click **Next**.
   
   The PCLaw Link Service: Log on As window opens.

8. Enter your domain\user name, password, and confirmation password.
   
   The PCLaw Link Service Installed window opens.

9. Click **OK**.
   
   A second PCLaw Link Service: Log on As window opens.

10. Enter your domain\user name, password, and confirmation password.

11. Click **OK**.

    The PCLaw Log Service Installed window opens.

12. Click **OK**.

    A third PCLaw Link Service: Log on As window opens.

13. Enter your domain\user name, password, and confirmation password.

14. Click **OK**.

    The PCLaw Time Matters Service is Running window opens.

15. Click **OK**.

   **NOTE** If the Time Matters login screen opens, the Server Utility is creating a link
to Time Matters to send the location of the redirect path for the Remote Client.
(Login may not be required at this time.)

The Action Complete window opens to confirm registration.

16. Click Done.

17. Open Time Matters and complete the PCLaw Link Setup at the Program Level and PCLaw Link Setup at the User Level to re-initialize the PCLaw Link.

18. Note: The system must be restarted to restart the services and to load the link from the Client after you have re-initialized the PCLaw Link.

**Set Up the Link in PCLaw**

1. Open PCLaw with the set of books you want to use to link to Time Matters.
2. Click the Options menu and then click Connection Settings.
3. The Connection Settings window opens.
4. Select Use this Set of Books when Connecting with Other Programs.
5. Click OK.

**Set Up the Link in Time Matters**

1. In Time Matters, click File > Setup > General > Program Level.
   The Program Level Setup window opens.
2. Click the Billing tab.
3. If the Activate Billing Matters check box is selected, do the following:
   a. Clear the check box.
   b. Click OK.
   c. Close and reopen Time Matters.
   d. Open the Program Level Setup window.
4. Click the Links tab.
5. On the Billing subtab, select the Activate Billing check box.
6. In the Select Billing Link box, click the arrow and select PCLaw.
7. Click the Set Billing Options button.
8. If the full PCLaw client is not detected on this computer, Time Matters will prompt you to install the PCLaw Remote Client. See "PCLaw Remote Client Setup" for additional information.

Time Matters initializes the PCLaw link. When the link has loaded, the PCLaw Link Setup window opens.

9. On the General tab, select the settings you want. For a description of each item on this tab, see PCLaw Link Options.

10. On the Billing Options tab, select the default settings you want. For a description of each item on this tab, see PCLaw Link Options.

   [NOTE] These settings can be modified for each user in User Level Setup.

11. Click OK.

12. If there is PCLaw link data from a previous version of Time Matters, you will be prompted to convert the existing data for Time Matters 16.4.0. Follow the on-screen instructions to create a backup of your database and begin the data conversion.

13. Click OK to close the Program Level Setup window.
Set up the PCLaw Billing Link with Time Matters

This is an overview of the steps needed to set up the PCLaw billing link.

1. Verify that your installed version of the PCLaw software is compatible with the Time Matters software. For information on system requirements, see: Time Matters 16 System Requirements article at the Time Matters Support Center.

2. Create a backup of the Time Matters and PCLaw software databases.

3. Configure the PCLaw book set to connect with third party applications.

4. Disable Billing Matters to enable linking to a third party billing application.

5. Configure the Time Matters software to link with the PCLaw software.

6. Associate matters in Time Matters with matters in PCLaw.

7. In Time Matters, click File > Synchronize > PCLaw if you want to move data into Time Matters from PCLaw

[NOTE] Changes made to Time Matters contact or matter records linked to the PCLaw software transfer upon saving and closing the record. Changes made to PCLaw clients or matters linked to the Time Matters software transfer through manual synchronization. Restoring a backup is the only way to reverse the outcome of a synchronization.
Time Entry Advisor
Time Entry Advisor Overview

The Time Entry Advisor helps you keep track of work that has not yet been billed.

The Time Entry Advisor window has three tabs:

- **Uncharged Time**: view billable records and send them to your billing system
- **Awaiting Billing**: view records sent to billing that have the Hold Record box selected
- **Ignored Items**: view records for which a decision was made not to bill

![Time Entry Advisor window](image)

RELATED TOPICS

- View Uncharged Time on the Time Entry Advisor
- View Records Awaiting Billing on the Time Entry Advisor
- View Ignored Records on the Time Entry Advisor
- Customize Fields Shown on the Time Entry Advisor
- Adding or Changing Sales Tax Rates
- Add Staff Rates
- Staff Rate Settings
View Records on the Time Entry Advisor

View Uncharged Time

The Uncharged Time tab of the Time Entry Advisor shows records that are marked as Billable, but have no corresponding billing record.

To view records representing uncharged time, do the following:

- On the Billing menu, click Time Entry Advisor.

The Time Entry Advisor window opens, displaying the Uncharged Time tab.

View Records Awaiting Billing

The Awaiting Billing tab shows records for which BOTH of the following are true:

- The record has been sent to billing
- The Hold Record check box is selected on the record form

To view records awaiting billing:

1. On the Billing menu, click Time Entry Advisor.
2. The Time Entry Advisor window opens.
3. Click the Awaiting Billing tab.
View Ignored Records

The Ignored Items tab of the Time Entry Advisor shows records that have been manually removed from the Uncharged Time tab.

To view ignored records:

1. On the Billing menu, click Time Entry Advisor.
2. The Time Entry Advisor window opens.
3. Click the Ignored Items tab.
**Other Time Entry Advisor Tasks**

*Filter the list of records shown on the Uncharged Time tab*

1. In the Date Range area, do one of the following:
   - Click the arrow and select a predefined date range (such as "Last Month") from the list.
   - Click the arrow and select Custom from the list. Type a start date in the From box and an end date in the To box. You can also click the calendar icon beside each box to select a date.
2. In the Record Types area, select the check box beside each record type you want to view on the list. Deselect the check boxes beside record types you want to hide.

3. In the Contact/Matter/Staff area, do the following:
   a. To view records for a specific Matter, type part or all of the Matter name in the Matter Ref box, or type part or all of the Matter number in the Matter No box. You can also click the lookup button beside either box to select from a list of Matters.
   b. To view records for a specific Contact, type part or all of the Contact name in the Contact box, or type part or all of the Client number in the Client No box. You can also click the lookup button beside either box to select from a list of Contacts.
   c. To view records for a specific Staff, type the Staff’s initials in the Staff box. You can also click the lookup button to select from a list of Staff.

   Note: To view items with no Staff assigned to them, leave the Staff box empty.

4. Click the Update List button to filter the list by the selected criteria.

*Change Records on the Time Entry Advisor*

1. Select the check box beside each record you want to change.
2. Click the Change Records button.
3. The Time Matters Change Express window opens.
4. Create a new template or use an existing one. Follow the instructions on the screen to apply changes to the selected records.

*Send Records to Microsoft Excel*

To create a Microsoft Excel spreadsheet showing information on the Uncharged Time tab, do one of the following:

- To include all records shown on the tab, click the Send to Excel button.
- To include specific records, select the check box beside each record you want to include, and then click the Send to Excel button.

*View Uncharged Time for a specific Matter or Contact*

- Right-click a Matter on the Matter list, or a Contact on the Contact list. On the shortcut menu, select Time Entry Advisor.

The Time Entry Advisor window opens, displaying records related to the selected Matter or Contact on the Uncharged Time tab.
Bill Uncharged Time Discovered by the Time Entry Advisor

1. On the Billing menu, click Time Entry Advisor.
2. The Time Entry Advisor window opens, displaying the Uncharged Time tab.
3. Optionally, enter criteria in the Filter by area and click Update List to show only records that match your criteria.
4. Select the check box beside each record you want to bill.
5. Click the Send to Billing button.
6. If multiple records were selected, select either the option to confirm each record before billing or the option to process all the selected records without confirmation. Click OK.
Time Matters for Microsoft Office
Overview of Time Matters for Microsoft Outlook

Time Matters for Microsoft Outlook gives you access to information about your Time Matters Contacts and Matter while you work in Outlook.

When this feature is enabled, the Time Matters pane appears on the right side of the Outlook window. On the Time Matters pane, you can:

- View summary information about the Contacts and Matter related to an Outlook email or appointment
- Search for Contacts and Matter in your Time Matters database
- Open a full Contact or Matter form for editing
- Enter time and expenses
- Create a new email to send to a Contact

Overview of the Time Matters Pane in Outlook

You can expand and collapse the Time Matters pane by clicking the arrow beside the pane's label: Time Matters.

When collapsed, the Time Matters pane shows the following:

- The Time Matters login currently in use
- The currently selected Outlook contact (by default, the sender of the selected Outlook email or the organizer of the selected Outlook appointment)
- The number of Time Matters Contacts and Matter related to the selected Outlook Contact
- Buttons to show details of related Contacts and Matter

When expanded, the Time Matters pane shows the following:

- A Search box to find Time Matters Contacts and Matter
- Tabbed views of related Contacts and Matter
- Options to open the full Contact or Matter form, and to enter time or expense for a Contact or Matter
Log in to Time Matters for Microsoft Outlook

1. Expand the Time Matters pane.
2. Enter your Time Matters user ID in the User ID box.
3. Enter your Time Matters password in the Password box.
4. Click the "Login" button.
View Contacts and Matter in Time Matters for Microsoft Outlook

Outlook Contacts versus Time Matters Contacts

Two different types of contacts are displayed on the Time Matters pane:

- Outlook Contacts are the persons or groups that appear in the header area of emails (the sender and recipients) or appointments (the organizer and attendees).
- Time Matters Contacts are a separate set of records, stored in your Time Matters database.

Typically, an Outlook Contact is related to only one Time Matters Contact. That Time Matters Contact, in turn, might be related to one or more Matter. So when you select an Outlook Contact on the Time Matters pane, it is typical to see one related Time Matters Contact and a small number of related Matter.

When you synchronize Time Matters with Microsoft Outlook, many of your Outlook Contacts are matched to Time Matters Contact records. When Contacts are matched, selecting the Outlook Contact will make its Time Matters Contact counterpart available to view, along with any Matter related to it.

**NOTE** Only Contacts and Matter assigned to you are visible in Time Matters for Microsoft Outlook. This means that the Staff associated with your user ID must appear in the Staff box of the Contact or Matter record.

View Contacts and Matter

In Outlook, click an email or calendar appointment to highlight it.

The Time Matters pane displays the number of Outlook Contacts on the email or appointment. It also displays the number of Time Matters Contacts and Matters related to the active Outlook Contact (the one whose name is displayed).

You can change the active Outlook Contact by pointing to the arrow beside that Contact. A flyout window opens, displaying a list of all the Outlook Contacts on the email or appointment. Click a Contact to make it the active one. The related Time Matters Contacts and Matters will be updated.

When the Time Matters Pane is Collapsed

- Point to the Contact button to view a flyout window with a list of Time Matters Contacts related to the active Outlook Contact. Click a Time Matters Contact in the list to display
details in the flyout window.

- Point to the Matter button to view a flyout window with a list of related Matters. Click a Matter in the list to display details in the flyout window.

*When the Time Matters Pane is Expanded*

- Click the Contact tab to view a list of Time Matters Contacts related to the active Outlook Contact. Click a Time Matters Contact in the list to display details for that Contact.
- Click the Matter tab to view a list of related Matters. Click a Matter in the list to display details for that Matter.
Search for Contacts and Matters in Time Matters for Microsoft Outlook

1. Expand the Time Matters pane. (When the pane is collapsed, clicking the Search button will expand it.)
2. Click the arrow beside the Search box and select Contact or Matter.
3. Type a portion of the Contact Name or the Matter Reference in the Search box.
4. Press ENTER or click the button.

A list of records matching the search text appears.

- **NOTE**: Only Contacts and Matters assigned to you are visible in Time Matters for Microsoft Outlook. This means that the Staff associated with your user ID must appear in the Staff box of the Contact or Matter record.
Enter Time and Expense Using Time Matters for Microsoft Outlook

You can enter time and expenses for a Contact or Matter that you are viewing in Time Matters for Microsoft Outlook.

1. Expand the Time Matters pane.
2. Locate the Contact or Matter for which you want to enter time or expense. You can do this by selecting an email or appointment related to the Contact or Matter, or by using the Search feature to find the Contact or Matter.
3. Double-click the Contact or Matter to display its details.
4. Click the $ button to display the time/expense entry form.
5. At the top of the time/expense entry form, select Add Time or Add Expense.

To add time, do the following:

[Images of Time Matters interface showing time and expense entry forms for Chandra Graham]
a. In the Description box, enter a short description of the time entry.
b. Optionally, enter a different date in the Date box (the current date is used by default).
c. Enter a start time and end time in the respective boxes.
d. Enter a code in the Code box. You can click the button to select the code from a list.
e. Optionally, enter additional information about the time entry in the Memo box.

To add expense, do the following:

a. In the Description box, enter a short description of the expense entry.
b. Optionally, enter a different date in the Date box (the current date is used by default).
c. In the Quantity box, enter the number of expense units.
d. In the Price box, enter the price per unit.
e. Enter a code in the Code box. You can click the button to select the code from a list.
f. Optionally, enter additional information about the time entry in the Memo box.

6. If you want to mark the time or expense entry as Private, select the Private check box at the top of the time/expense entry form.

7. Click Save.