



# What's New in Time Matters® 14

## Time Matters® 14 New Features & Enhancements

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### New Calendar Design

The Time Matters 14 software includes a new, single, 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
- Drag and drop capabilities to change event dates/times and task dates on the Daily and Work Week views
- Automatic parallel view to see multiple calendars side by side (Daily and Work Week views only)
- Ability to use Shift or Ctrl keys to tag/select multiple records
- Event headers and descriptions will be displayed
- The color of event and to do headers will be displayed on the Daily, Work Week, Weekly and Monthly views
- Special dates now work like all-day events, greying the entire day

### “In-Place Upgrade” Capability

The software upgrade process has been improved in this release, reducing the downtime required to move from the Time Matters 13.x to Time Matters 14 software. In one case, a 157 MB Time Matters database took **40% less time to upgrade** from version 13 to version 14 than it did from version 12 to version 13. Your actual results may vary based on the size of your Time Matters database, network speed and server/workstation configurations.

### Expansion of Time Matters Technology Platform

The technology underlying the Time Matters software has been expanded in this release. This expansion will enable the future delivery of additional new capabilities, software improvements and innovations to help you solve your clients' and your firm's challenges.

## Time Matters 13.1 New Features & Enhancements

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### Quarterly Event and Task Scheduling

You can now schedule events and tasks to recur on a quarterly basis to help you remember tax payments and other important items that only occur every three months.

### Save Multiple E-mails from Microsoft Outlook® Simultaneously

Multiple Microsoft Outlook e-mails can be saved as documents using the TM Connect feature, making filing client correspondence easier.

### Third-Party Integrations

The following third-party integrations have been updated, enabling you to leverage your existing software investments:

- Sage Timeslips
- Intuit® QuickBooks® Pro and Premier
- HotDocs™
- Microsoft Windows®
- Microsoft Internet Explorer®

## Time Matters 13 New Features & Enhancements

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### Client Portal Online File-Sharing

This version streamlines the document-sharing process to help you be more productive while reducing the risk of unauthorized access. A new, integrated Client Portal—powered by technology from WatchDox™, a leading provider of secure file-sharing, mobile productivity and collaboration technology—allows you to share your Time Matters documents online with client, experts and other third parties.

The online file-sharing capabilities in the Time Matters 13 software offer you control over and protection of shared files:

- Define who can access the file—only the contact(s) associated with the matter, anyone with the same e-mail domain as the contact(s) or everyone
- Determine what they can do with the document—view, print or download
- Prevent screen captures of the file by displaying only small areas at a time
- Identify the timeframe that they can access the document

- Track the file's whereabouts at all times and maintain an audit trail for compliance purposes
- Revoke access to files anytime

Contacts are notified of shared files by e-mail and can view the files from any Internet-connected device.

\* **NOTE:** Customers must subscribe to a current Time Matters Annual Maintenance Plan to access the online file-sharing service. Up to a total of 5 GB of data per firm may be shared and available online at one time. LexisNexis reserves the right to modify these limits at any time.

## Automatic Data Backup

Regular backups of your Time Matters data can help your firm recover quickly from any disaster with minimal impact on client service levels. Better yet, regular backups can reduce the risk that you will fall behind or miss an important date or procedural step that could lead to a malpractice claim.

This release of Time Matters lets you schedule and automate backups of your Time Matters database and Time Matters shared file directory to help protect you from the unexpected. You can specify a time of day for the backup that's convenient for firm members and the backup frequency. You can also perform a manual backup at any time.

## Usability Improvements

Usability improvements in the software will help you work more efficiently in the software:

- Sort records by date and time in the **Contact Timeline**, **Matter Timeline** and **Attachments Lists** to make the most recent items—likely the ones you're looking for—readily accessible
- Color-code matters within the calendar to easily identify related tasks and events, as well as visually remind you about the billable time you've worked throughout the day
- Be more productive through improved **TM Messenger** performance
- Take advantage of all the changes and improvements in new releases sooner with a simpler process for new server and workstation installations

## Billing Matters Software

### *Removal of Billing Matters Accounting Functionality*

In preparation for the December 31, 2013 discontinuation of Billing Matters Accounting (Billing Matters Plus) support, the following features **have been removed** from the Billing Matters 13 software:

- Accounts payable
- Chart of accounts
- Vendor lists and 1099 reporting
- Check-writing (if link to third-party accounting software is not enabled)
- Bank reconciliation
- Financial reporting
- Journal entries

The following features will remain in the Billing Matters software:

- BillFlow Manager
- Time and expense capture
- Payment, deposit, credit and write-off transactions
- Check-writing (if link to third-party accounting software is enabled)
- Billing
- Trust accounting
- Standard reports for billing, setup and transactions
- Chart of accounts fields (linked only if the link to Intuit QuickBooks software is enabled)

## Time Matters 12 New Features & Enhancements

### Time Entry Advisor

The **Time Entry Advisor** helps firms capture more billable time, finding unbilled documents, events, tasks and other items in the Time Matters software and presenting them in an easy-to-use spreadsheet view.

#### *Benefits to Timekeepers and Staff*

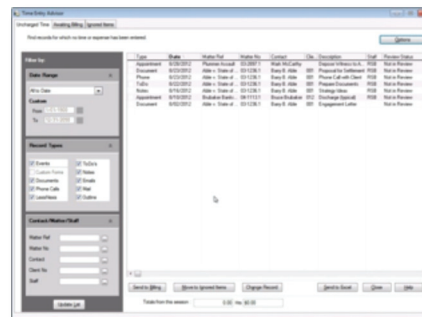
- Provides an efficient way to help you capture all possible billable time

#### *Benefits to Billing and Accounting Staff*

- Streamlines your billing process—allows you to get bills out quickly and in a timely manner to help maintain regular cash inflows

#### *Benefits to Firm Leadership*

- Increases firm revenues and profitability by reducing otherwise lost billable time



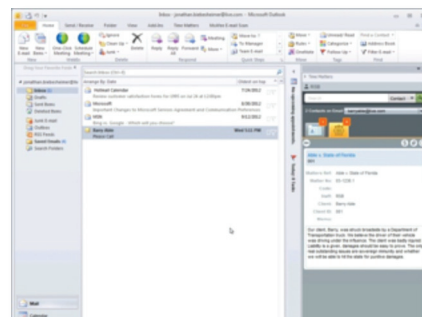
The Time Entry Advisor offers a single, chronological view of potential billable entries and allows you to filter tasks by date, activity type, matter, client or lawyer.

### Time Matters® for Microsoft Outlook Add-In

The Time Matters for Microsoft Outlook software add-in will help you work more efficiently in both programs, displaying relevant Time Matters data based on the information in your Outlook e-mail and calendar. You can view, enter and edit your Time Matters data easily and securely, with changes available to all Time Matters users.

#### *Benefits to Timekeepers and Staff*

- Brings you the rich context of client and matter information in the Time Matters software without requiring you to leave Microsoft Outlook
- Offers you the choice of working in the Time Matters software or in Microsoft Outlook



The Time Matters for Microsoft Outlook add-in brings rich client and matter information from your Time Matters software into your Microsoft Outlook e-mail and calendar.

## E-mail Management

E-mail management enhancements in this release enhance your productivity:

- Allows you to save e-mail messages from Microsoft Outlook as an e-mail record in the Outlook \*.msg format or as document records
- Enables you to save attachments in Outlook e-mails as document records

## Integration with PCLaw® Software

This version improves the integration of the Time Matters and PCLaw software applications so you can help ensure accurate data transfer and synchronization between the two products:

- Includes a new Send to PCLaw button that links Time Matters records and associated PCLaw records
- Checks for duplicate records when new Time Matters client records are added in the PCLaw software
- Incorporates a new PCLaw tab in Time Matters contact records and matter records that displays the Time Matters information synchronized with PCLaw
- Prevents the creation of duplicate Time Matters records when PCLaw clients and matters are renumbered
- Allows flat-fee time entries from the Time Matters software to be sent to the PCLaw software for billing
- Improves the matching of Time Matters staff, code, contact and matter fields
- Supports the additional name and category fields introduced in the PCLaw 12 release
- Includes a link troubleshooting tool for use as needed

## TM Save

Improved TM Save capabilities in the software ease the process of saving information directly into the Time Matters application.

## Time Matters 11.1 New Features and Enhancements

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### Integration with Microsoft Exchange Server

This version dramatically expands the integration with Microsoft Exchange Server 2007 and brings that same expanded integration to Exchange Server 2010:

- Improves the handling of recurring events in Exchange Server 2007 integrations to help users operate more efficiently—no need to manually re-enter or update multiple events in the Time Matters software when a recurring event is created or changed in Microsoft Outlook

- Reduces the time and cost required to upgrade to Exchange Server 2010 by allowing users to import calendar events and contacts from previous Time Matters software and Exchange Server 2003 and 2007 integrations
- Helps users better organize and store their documents by enabling them to include the month, year and/or class code in the folder when using **Document Auto-Naming**

## Third-Party Integrations

The following third-party integrations have been updated, enabling you to leverage your existing software investments:

- Mozilla® Firefox®
- Sage Timeslips
- Intuit QuickBooks Pro and Premier
- Corel® WordPerfect®

## Time Matters 11 New Features and Enhancements

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### Time Matters® Mobility Service

The Time Matters Mobility service provides secure, real-time access to selected Time Matters functions from most Web-based mobile devices and smartphones with live Internet connections. See the **Time Matters Mobility** section at the end of this document for details on **Time Matters Mobility** releases.

### Microsoft Windows Terminal Services Support

You can reduce your IT burden by deploying your Time Matters software in a Microsoft Windows Terminal Services environment. In a Windows Terminal Services environment, there is no need to install the Time Matters software on each individual machine. Simply install it once on your server and all firm members (including remote offices) can access the system through your internal network.

### Integration with PCLaw and Juris Software

This version of the Time Matters software improves the integration with both the PCLaw and the Juris software applications so you can ensure accurate data transfer and synchronization between the two products.

## Third-Party Integrations

The following third-party integrations have been updated, enabling you to leverage your existing software investments:

- Intuit QuickBooks Pro and Premier
- Tabs3
- HotDocs
- Corel WordPerfect
- Microsoft Internet Explorer
- Fujitsu® ScanSnap desktop scanners

## Time Matters 10 New Features and Enhancements

### Microsoft SQL Database

Starting with Version 10, all Time Matters and Billing Matters software will use a Microsoft SQL database for enhanced performance, improved search speed and better scalability as your firm grows.

### Database Backup

Protect your Time Matters data by setting automatic backups with the easy-to-use **Backup/Restore Scheduler** or run backups as needed from the command line.

### Comprehensive Power View

The Time Matters 10 software includes a comprehensive **Power View**, providing you with all of the information you need about a case or matter in a single, easily accessible location.

### Document Management

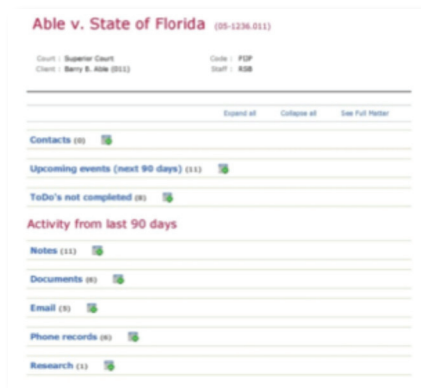
This version includes enhanced merge templates and supports sub-folders which helps you simplify document organization.

### TM Connect

The TM Connect feature allows you to complete the staff and code fields when using the **Batch Create** feature to create multiple Time Matters records from Microsoft Outlook e-mails.

### Enhanced Compression Technology

Starting with the Time Matters 10 release, there is no limit to the number and size of files that can be placed in a \*.zip file.



Time Matters Power Views provide all of the information you need about a case or matter in a single location.

## Time Matters 9 New Features and Enhancements

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### User-Defined Record Types

Five new user-defined record types enable you to track what interests your firm. For example, you can create an “assets” record type to manage your firm’s assets or a “damages” record type to collect and maintain information about damages collected and outstanding after you win your case.

### List Task Panel

The **List Task Panel** makes it easy to work with your records, navigate between record types and complete work more quickly.

### Wizards

Seven new wizards help you set up complex, powerful functions by walking you through basic staff, user, security profile, class code, e-mail, **Quick Tab** and record review setup.

### Toolbars

The ability to display multiple main toolbars simultaneously enables you to set up and then show both your matter management and billing toolbars at the same time.

### Power Views

The new **Power View** graphics and enhanced features add greatly to the professional feel of the software.

### User Interface

The updated user interface utilizes the underlying graphic elements of the Microsoft Windows operating system to work more seamlessly with Windows settings.

### Sub-Lists

The ability to right-click to mark items as “done” from related records sub-lists makes it easier than ever to get a centralized view of where a case, matter or contact stands.

### Assignment Capacity

The Time Matters calendar, events and all forms support up to 100 staff members (previous releases only support the assignment of six staff members).



## Archiving Capabilities

When archiving Time Matters matter/case or client information, you have the option to archive supporting date-related record types and opt out incomplete items from the archiving process.

## Triggers

Enhanced triggers in the software enable you to activate activities when fields are populated or changed, or when a new record is added to your Time Matters software. For example, you can now automatically send a message to your file clerk to close a file if the Close File date field is completed. Or, you can prompt your staff to begin your client intake process when the contact class code changes from **Prospect** to **Client**.

## Integration with Microsoft Exchange Server

Improved synchronization with Microsoft Exchange Server enables your firm to:

- Run synchronization as a service
- Run synchronization as a service on a machine other than the Exchange Server
- Synchronize with more than one Exchange Server (for firms that have users distributed across multiple servers)
- Synchronize contacts to Microsoft Outlook contact folders

## E-mail

The Time Matters 9 software includes a variety of improvements to e-mail creation and management:

- Addresses issues with MAPI integration and HTML editing portions of the internal e-mail component
- Allows you to batch save multiple e-mail items in Microsoft Outlook into the Time Matters software
- Offers you a setting to automatically store e-mail attachments outside of the Time Matters database
- Includes a utility to move legacy e-mail attachments from a file system to the Time Matters database or from the Time Matters database to a file system

## Integration with LexisNexis® CaseMap® Software

Improvements to the link with CaseMap software enable you to send multiple case/matter records and research results to the CaseMap application, making it even easier to work with larger volumes of data and reducing the risk of errors and oversights.

## Security Profiles

The following default security profiles are available—Administrator, Billing Administrator, General User, Power User and Temporary Staff—making it easier to put security and privacy in place for your firm's

data. Security profiles now have an “exceptions” tab available for more finely tuned control over your data.

## Navigators

This version of the Time Matters software includes a variety of improvements to the program navigators:

- Adds a training and support navigator.
- Allows you to set the background colors for navigators.
- Adds images to the Custom Image feature to match the user-defined record icons.

## Global/Conflict of Interest Search

The updated, more powerful search feature helps you conduct effective and fast conflict of interest and global searches. A new search field—search entry—can also be added to the toolbar for immediate access to searching.

## Contact, Matter and Personal Journals

The **Contact** and **Matter Journals** let you show related contacts or matters. The **Personal Journal** now offers class code filters for contacts and matters to let you further customize your view and also shows only items in review that are still incomplete

## Auto-Complete

Auto-complete from the contact and matter regarding line is now available for search, billing and reports to make it faster and easier to search and filter. Minimize mistakes and see the results you need.

## Calendars

Calendars have been redesigned to streamline them for ease of use.

## Integration with Juris® Software and PCLaw® Software

Improvements have been made to tighten the integration and to the performance when linking the Time Matters software with the Juris or PCLaw software. Additional configuration options reduce the previous requirement to install the complete PCLaw application on every workstation.

## Time Matters 8 New Features and Enhancements

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### Automatic Updates

The ability to check for software updates automatically helps you ensure that your software is always up-to-date.

### AutoTXT

Insert words or complete paragraphs with a few keystrokes using the new AutoTXT functionality available from all Time Matters records. Ensure standard wording and minimize typing errors on firm records, invoices and documents by implementing program-level AutoTXT codes for the most commonly used document text and firm activities.

### Calendar

Calendar conflict functionality allows you to run conflict checks on repeating events, view details of conflicting calendar entries for individual staff and display conflicting record information.

### Integration with CaseMap Software

Send matter, contact and other information your Time Matters software to your CaseMap software to help organize case data.

### Client/Contact Numbering

This version of the Time Matters software allows you to assign both unique client and matter numbers for easy reporting and organization of your contacts and cases. Produce reports and filter records grouped by client or matter. Client numbering can be masked using a variety of automated formats to relate contacts and matter.

### Printing

Create custom printer assignments and let your printer do the thinking! Save the time ordinarily spent loading and reloading paper by assigning Microsoft Windows printer trays to make document, invoice and check generation effortless. Dedicate one printer or drawer for labels, one for letterhead and one for invoices never changing paper between printing runs again.

### Lookup Lists

Customize lookup lists for Time Matters records to make searching easy! Set columns and information to your preferences, making data mining simple.

## Document Management

Convert documents to Adobe® Acrobat® PDF format before e-mailing them. Because many legal documents are e-mailed in PDF format, this feature can help you save time and money.

## Microsoft Outlook Integration

Display information from the Time Matters software when you highlight an Outlook contact, task or e-mail. Also, Outlook users can be prompted to save items into the Time Matters software when sending an e-mail, saving an appointment, task or contact in Outlook. The **TM Connect** functionality will save Outlook attachments as document records automatically.

## Inactive Staff and Classification Codes

Set former employees' staff codes to **Inactive** status in the Time Matters software to eliminate long drop down lists yet maintain vital historical data. Classification codes can also be set to Inactive status to eliminate and clean up firm classification options.

## Power Views

Search from and insert data from the **Clipboard** into **Power Views**.

## Recycle Bin

Sort and empty the **Recycle Bin** date or record type. Tag, delete or restore records from the **Process** menu.

## Invoicing

Save invoices as documents associated with a client or matter with a single click.

## Scanning

Set default file types for scanned documents to meet your personal preferences.

## Security

Enhance your firm's security through support for strong passwords. Require alphanumeric characters and specific lengths in user passwords. Set program-level settings to lock users out of the Time Matters software after five incorrect attempts. Allow your Time Matters Administrator to prevent others from changing system security settings and lock users out of the software during maintenance.

## TM Connect

Integrate the Time Matters application with Microsoft Outlook using **TM Connect**. Create and associate Time Matters e-mail, contact, event and task records using **TM Connect** from Outlook.

## Other Integrations

Effortlessly create and e-mail PDF documents from the Time Matters **Document** list and Lexis® research. Send documents to the Time Matters software instantly with a right click through enhanced integration with Microsoft Windows. Access the **TM Save** and **TM Open** functions from Firefox or Adobe Acrobat Reader. Save Web research directly from Firefox or send a PDF from Adobe Acrobat or Adobe Reader to the Time Matters software.

Also, integrate with other critical applications that help you manage your practice, such as:

- Shepard's® CheckCite®
- LexisNexis CaseMap
- Worldox®
- iManage
- DOCS Open®

## Time Matters 7 New Features and Enhancements

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### Calendar

View events scheduled for the same date and time side by side. Extend the events duration by clicking and dragging your mouse to the specified time. Identify staff associated with events through improved color coding. Simplify multi-date event scheduling such as a trial or out-of-town trip using the **Multi-Date Scheduling** feature (similar to recurring events).

### Navigators

Create fully-customized **Navigators** to define your workflow, dramatically simplifying how you and your staff use the Time Matters software.

### Client and Matter Monitor

Monitor activity on your contacts and/or matters. Receive notifications when assigned contacts and/or matters have activity such as additions of other staff or modification and deletion of client phone, document, e-mail and other record types:

- For clients with high profiles, when a record is opened, the user can be notified with a message like, "Treat this client with care and address him as Mr. Wiley"
- You can be notified and track specified client or matter documents that are created or scanned into your Time Matters system
- When an assistant or docket clerk sets a court date for a client and/or matter on your calendar, you can be immediately notified

## Client and Matter Journals

Access journal views that show items related to a particular contact or matter. The **Client** and **Matter Journals** have the same functionality as the **Personal Journal**.

## In/Out List

Easily see Time Matters users in or out of the office with the **In/Out List**. Set your return date and time to be prompted to check in when logging back into the Time Matters software. Change your status on the **In/Out List** by right-clicking on the messenger to view and change your status.

## E-mail

The following new and enhanced capabilities have been added to the Time Matters e-mail functionality:

- Set Inbox rules as inactive to temporarily disable them
- Re-send an e-mail through a simple right-click
- Automatically send an "out of office" e-mail response based on incoming messages
- Define the number of times that an "out of office" auto-response is sent
- Set and receive a reminder to turn off the **Out of Office Responder** when you log back into the Time Matters software
- Place the mail agent in your system startup to check your Time Matters e-mail automatically even if the Time Matters software is not open
- Tag multiple contacts and create specified relationships between each individual contact and the e-mail sent
- Tag multiple e-mails and save them to contact and/or matter records
- Send vCards (electronic business cards)
- Create contact records in the Time Matters software from vCard (\*.vcf) e-mail attachments

## RSS News Reader

Check the latest news from your RSS feeds. Send a link to the article via e-mail or save it to a Time Matters Web form.

## Time Charts

Create a visual timeline to display time-dependent record types within a matter or contract. See only the records you want to better manage your contact or matter.

## Integration with PCLaw Software

Add a Time Matters expense for an associated PCLaw vendor then send the expense to the PCLaw software.

## Personal Journal

View contacts, matters, news and records. See event, task, phone, e-mail and billing records, as well as documents for all contacts and matters. Add, change or delete records. Drag and drop records to relate them to each other.

## Time Matters® for Lexis.com®

Perform your legal research in the Time Matters software (requires a subscription to LexisNexis services). Save your research history in the Time Matters software and search the software for related previous research. Use the **LEXLink™** feature to scan documents for legitimate citations and transform them into hyperlinks to the full text of the citation in the Lexis.com research system. Click the Shepardized® hyperlink to go to the Shepard's report for that particular cite.

## Integration with Microsoft Small Business Accounting 2006

Synchronize Time Matters contacts and matters with customers and jobs in Microsoft Small Business Accounting and vice versa. Changes to those records in one application are reflected in the other application's database. Send time and expense entries from the Time Matters software to Microsoft Small Business Accounting to complete the billing process.

## Reporting

Save a report, calendar or financial statement as an HTML Web page or Microsoft Excel® (\*.xls) file. Automatically create a Time Matters document record or launch an e-mail record with the saved file attached. Add fonts and other details to your preferences once saved in a spreadsheet format.

## Integration with DOCS Open

Produce documents in your Time Matters software using DOCS Open profiles.

## Time Matters® Mobility Service\*

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The **Time Matters Mobility** service provides secure, real-time access to your Time Matters contacts, matters, calendar, notes and tasks, plus allows you to enter time and expenses from most Web-based mobile devices and smartphones with live Internet connections.

- View, enter, edit contacts, matter, time and expense information
- Search contacts, matters, and time and expense information by name, number, staff or code
- Find events, view event details, add events, and add time and expenses to an event
- View other users' calendars
- View note records
- View task records and mark them complete
- View a list of documents in your Time Matters software and e-mail a document to one or more individuals

\* **NOTE:** Only available to customers on Time Matters 11 or newer software versions. Customers must subscribe to a current Time Matters Annual Maintenance Plan to access the Time Matters Mobility service.

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