

Time Matters Training Guide and Workbook

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Manual Conventions





- ❖ Each lesson begins with an introduction to the topic. Read the introduction to get an overall understanding of the topic.
- ❖ In the left column (Procedures), the steps for completing the task are listed.
- ❖ In the right column (Comments/Prompts), explanations of the steps, names of screens that will display, and important information related to the individual steps are listed.
- ❖ Text to be typed or clicked on is displayed in **Bold**.
- ❖ Important Notes are preceded by a .
- ❖ Helpful Shortcuts are preceded by a .

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Lesson 1

Getting Started

- Time Matters – An Overview
- Original Main Record Types
- Starting Time Matters
- Alerts, Reminders and Watches
- The Time Matters Screen
- Working with Lists
- Navigating in a List
- Changing Fields and Column Widths
- Power Views
- Working with Forms

What is Time Matters?

Time Matters is a comprehensive, integrated system for managing essential practice management records - calendar, contacts, matters, documents, email, time and expense records and more.

Time Matters is both a contact and matter centric relational database for Calendar Events and ToDo's; Contacts and Matters; E-mail, Documents, Notes Phone and Billing records. Time Matters is flexible and customizable. Individual fields may be reclassified as text, numbers, dates, etc., with field labels relevant to your type of work. Lists may be customized and pre-sorted in a variety of formats and displayed using Quick Tabs and specified record selections called Power Views.

Time Matters will allow you to achieve the following:

1. Maintain a complete Calendar of Events and ToDo's.
2. Create customized fields specific to your type of practice.
3. Instantly see the Calendar and other records related to a specific Matter or Contact.
4. Maintain a historical record of Events, ToDo's and all other records .
5. Synchronize calendars, address books, and phone numbers with Outlook or Outlook/Exchange, Palm or Blackberry software.
6. Create and save a wide variety of reports.
7. With proper customization, you can support each step of each process for improved efficiency and more effective management for a more profitable practice.

Time Matters Main Record Types

Your client related information is captured on four main record types:

Events and ToDo's records populate your calendar. Contacts and Matters records form your client centric and matter centric database. All other supporting records such as documents, notes, email, phone, billing, user defined records, can be related into one integrated database.

The Main Record Types

What is an Event?

Event records are date and time dependent calendar entries such as meetings, hearings, depositions, conferences, etc. Events have a 'time of day' and usually do not follow from day to day if not marked done.

What is a ToDo?

ToDo records are similar to events, but are not dependent on the time of day. Todo records do not have a 'time of day' and usually do follow from day to day if not marked done. For example, a Todo may be for a follow-up of a information request, where the user will keep active from day to day until done.

What are Contact records?

Contact records are generally for people or organizations. The Contact List acts much like a rolodex of all of the names, addresses, and phone numbers of individuals associated with your firm. Contact records can also be customized with extensive dates, numbers and names etc. for quick reference. Other 'client' related records many be linked for an extensive history at the client level.


What are Matter records?

Matter records, are typically an electronic equivalent of a physical file. Matters may be labeled as Project, File Case, Engagement, Claim or Account. Matter records can also be customized with extensive dates, numbers and other related names etc. for quick reference. Other 'matter' related records many be linked for an extensive history at the matter level.

Starting Time Matters

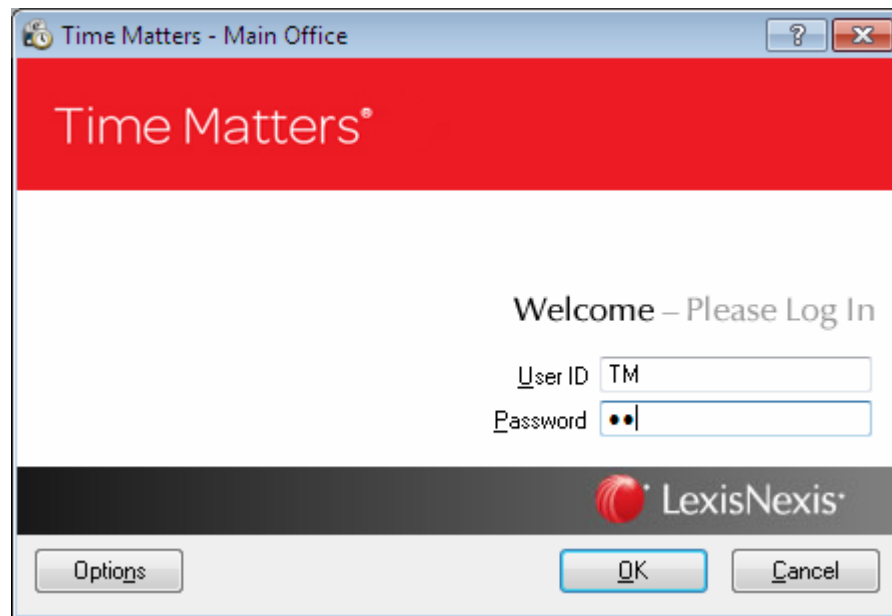
Time Matters provides a training 'tutor' database with a separate set of records available for Training. This training guide will be using the tutor database for training purposes. To run Time Matters in your office, select Start, Programs, LexisNexis, and select Training Mode - Time Matters 10.

Each user can customize the system so that the 'Tip of the Day' and the 'Show Alerts and Reminders' screens are initially either on or off. Also, the record type you use most often can be set to open by default. You can find these options under File/Setup/General/User Level/General. Details on setting these options are covered in the Time Matters User Manual.

| <u>Procedures</u> | <u>Comments/Prompts</u> |
|---|--|
| 1. Click on the Windows  Start button , then Programs . | Display the Programs list. |
| 2. Click on LexisNexis | Display the Time Matters group of programs. |
| 3. Click on Training Mode - Time Matters | Start the Training mode of Time Matters for this class. |

*You may get messages about
updating the data. Simply follow
the prompts to update the data.*

Time Matters Login Screen



4. Type **TM**

Type your user ID. In the classroom, it is TM.

Ask your system administrator for the Time Matters user ID and password for logging into the office database.

5. Press **Tab**

Move to the Password field.

6. Type **TM**

Type your password. In the classroom, your password is TM.

See File> Set-up> Users and Security> Security for options:

- Save User ID and Password
- Use of 'strong' passwords,
- Disable login after 5 attempts
- Use of Windows user name.

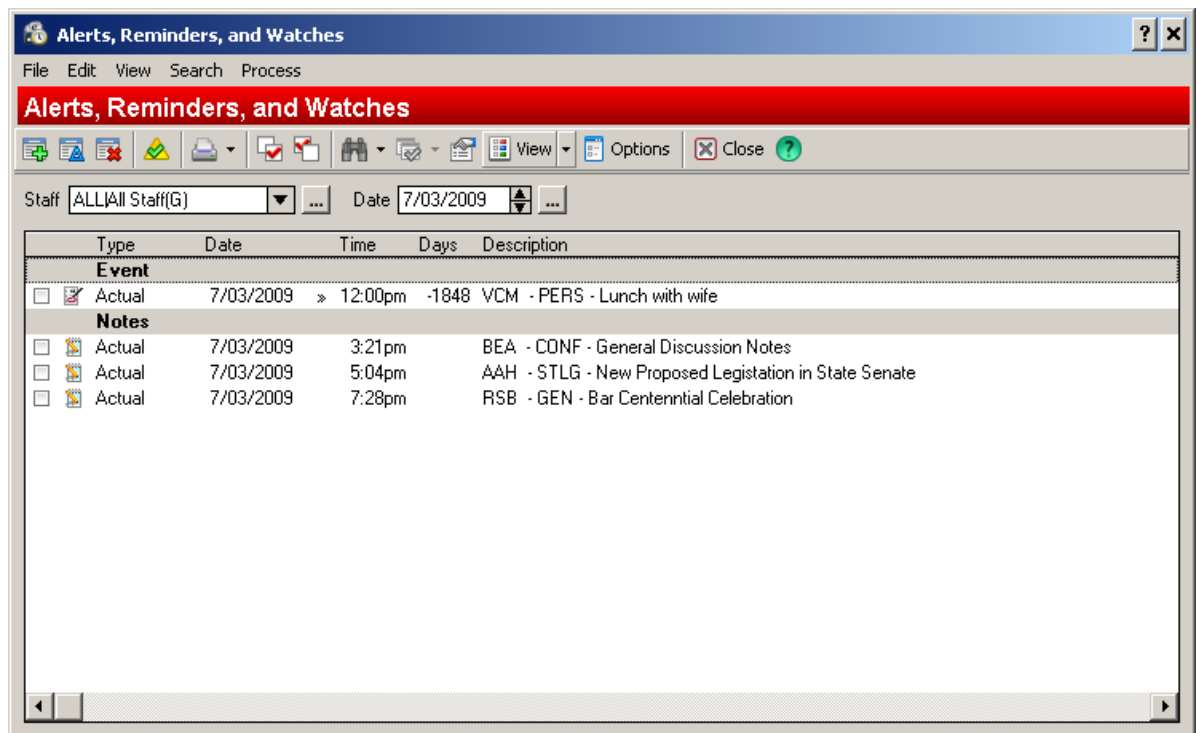
The Alerts, Reminders and Watches Screen

The **Alerts, Reminders and Watches** screen pulls together the Events and ToDo's, as well as, selected supporting records and Reminders for any given day.

The Alerts and Reminders screen displays records that are:


1. Actually scheduled for the day.
2. Reminders for upcoming activities.
3. Past due activities that have not been marked done.
4. Notification of additions and changes made by others to your calendar.

Most users elect to have the Alerts screen automatically appear when Time Matters is started




Working with the Alerts and Reminders Screen

A list of icons is displayed at the top of the Alerts screen. Each icon represents one of the record types displayed on the Alerts screen.

| <i>Procedures</i> | <i>Comments/Prompts</i> |
|---|---|
| 1. Highlight an Event on the Alerts screen | Select the record you'd like to work with. |
| 2. Click on  Mark Record Done | You can easily mark an Event or ToDo done from the Alerts screen. |
| 3. Click on Close | Close the Alerts And Reminders screen. |
| 4. On the Alerts Toolbar Click View | Select the type of records to be displayed. |
| 5. On the Alerts Toolbar Click Options | Make the appropriate selections to customize the Alerts display |



To view the Alerts screen at a later time, click on  from the Main toolbar.



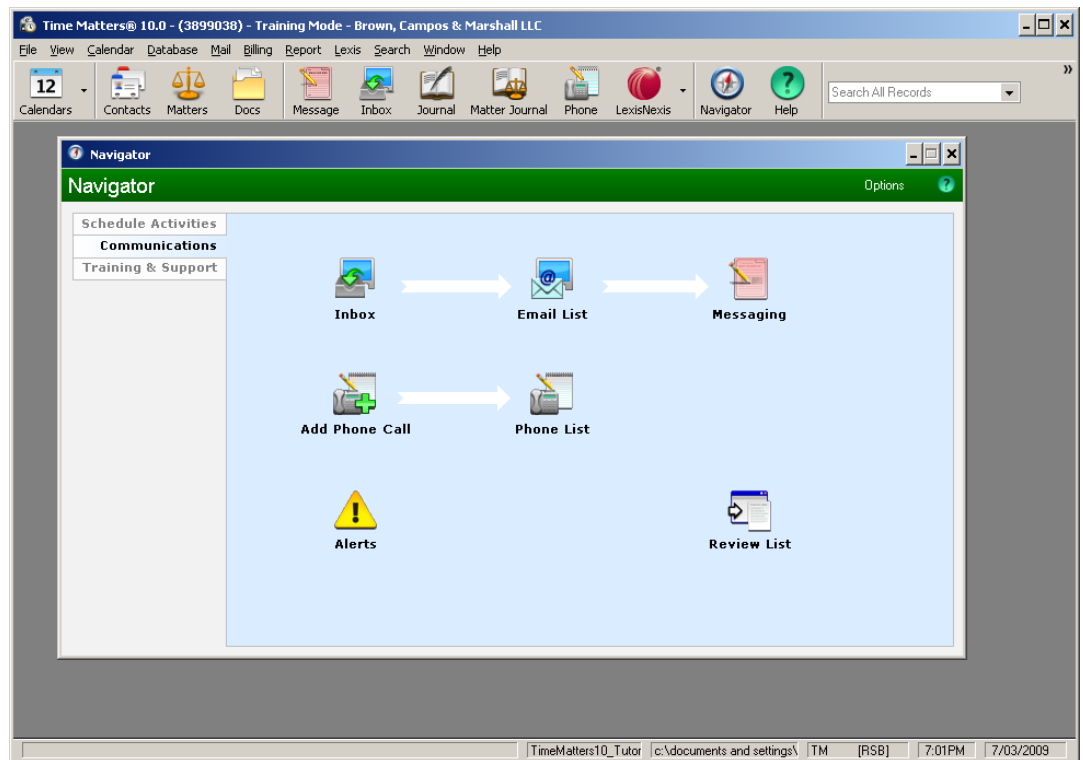
Working with the Navigator

As you login, depending on your user settings, an optional Navigator screen may appear. Navigators group sets of commonly features or processes all in a single location

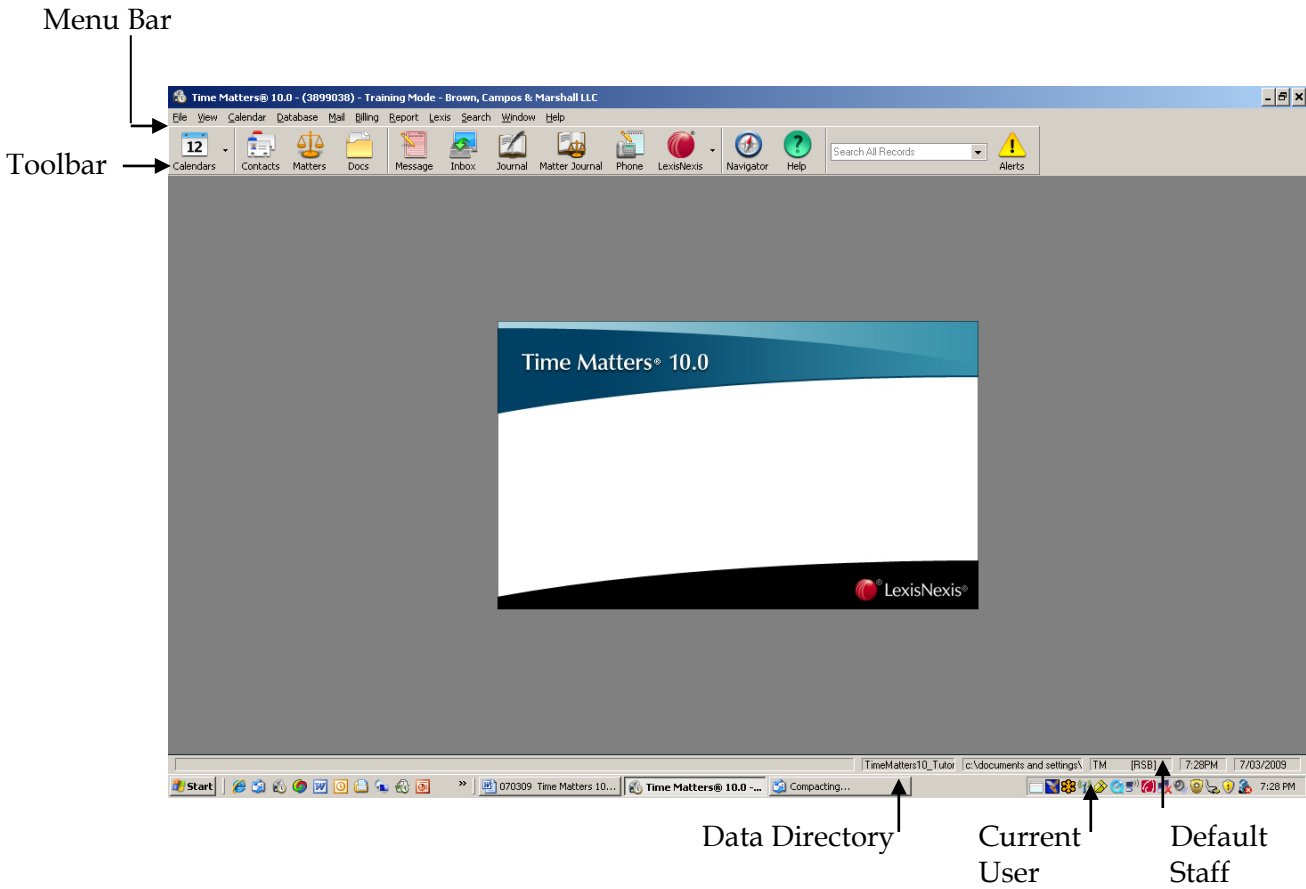
Procedures

Comments/Prompts

- | | |
|---|--|
| <ol style="list-style-type: none"> 1. Highlight any Icon. 2. Click on Options to add or remove Navigators | <p>Select the feature you'd like to work with.</p> <p>You can customize your list of Navigators which will appear on the left side Navigator list.</p> |
|---|--|



The Time Matters Screen



“User” is someone who operates the Time Matters program. The system manager may set security for each user for various areas of the program.

“Staff” is typically someone who maintains a Calendar, and owns the record and is actually responsible for the work.

☞ *Other resources besides persons can be ‘staff’. For instance, create a staff called ‘CONF’ to track in the calendar, when your conference room is going to be in use.*

☞ *Staff may be set to Inactive which will suppress the staff from dropdown lists. On the Menu Bar, press Database> Staff> Change Record >and check ‘Make Inactive’ (at the top right of the Staff screen)*

Working with Lists

All record types can be viewed in a list format and each list has common features. To locate a particular record, from within a list, from anywhere on the screen, type the first few characters of the desired record and the system will immediately advance to the record with the closest match using the 'QuickPick'.

Any record type list can be displayed by clicking on the associated icon on the toolbar. For example, to see your list of Matters, click on the Matters icon on the main toolbar.

Most record lists can be displayed by using a shortcut key.

Shortcuts for displaying lists:

| | |
|---------------------|---|
| <i>F3</i> | <i>Displays the Event List</i> |
| <i>F4</i> | <i>Displays the ToDo List</i> |
| <i>F5</i> | <i>Displays the Contact List</i> |
| <i>F6</i> | <i>Displays the Matter List</i> |
| <i>F7</i> | <i>Displays the Note List</i> |
| <i>F11</i> | <i>Displays the Email List</i> |
| <i>F12</i> | <i>Displays the Billing (time and expense) List</i> |
| <i>Ctrl+I</i> | <i>Displays the Email Inbox</i> |
| <i>Ctrl+Shift+T</i> | <i>Opens a New Todo Record</i> |
| <i>Ctrl+Shift+N</i> | <i>Opens a New Note Record</i> |



*For a printable chart of popular Time Matters short keys and other items, visit the free Resources area of Premier Software's **Managing with TimeMatters Forum** http://support.premiersoftware.com/MT_Forum/*

Several lists may be active and displayed at the same time. To do this, from the menu bar at the top of the screen, simply click **Window** and select *tile* or *cascade*. This will organize and display all the active lists on your screen.

You can filter, sort, and arrange list records in the way most beneficial to you. Also, you can create "**Quick Tabs**" which show a special selection and layout of records.

Navigating in a List

The Matter List will be used as an example for navigating in a list. However, all record lists function in the same manner.

Procedures

Comments/Prompts



1. Click on **Matters** from the Main Toolbar (or simply press **F6**)

Each list has a default sort order. Matters are automatically sorted by Matter Reference. However, you can sort (ascending/descending) on any column by clicking on the column heading. Click again to reverse the order.

The QuickPik respects the column you are sorting by.

Task Panel

The screenshot displays the Time Matters 10.0 interface. On the left is a 'Task Panel' with options like 'Create New...', 'Quick Tabs', 'Power Views', 'Process', 'Navigate', and 'Search'. The main window shows a 'Contacts' list with columns for Last, First, ClientNo, Code, Firm, Man, and Fax. The contact 'Rafael Molina' is selected. On the right, a 'Power View' window shows detailed information for Rafael Molina, including address (14568 8th Street, Miami FL 33154), phone numbers, and various codes (CLNT, RSB, A). The status is 'United Builders (05-1423.02)'.

| Last | First | ClientNo | Code | Firm | Man | Fax | Email |
|--------------------------------|-----------|----------|----------|--------------------------------------|--------------|--------------|-------|
| McCarthy | Mark | | EXPT | St. Lukes Hospital | 904-555-4383 | | |
| McCaw | Mark | | EXPT | McCaw Enterprises | 359-555-1340 | 359-555-1339 | |
| Meeks | Carolyn | | ATTY | Brody Law Firm | 561-555-4543 | 561-555-4098 | cme |
| MegaTech Computers, Inc. | | 049 | COR CLNT | MegaTech Computers, Inc. | 305-555-4344 | 305-555-7444 | |
| Molina | Rafael | 025 | CLNT | | 305-555-1616 | | |
| Nonnoky | Patricia | | JUD | 4th District Court of Appeals | 561-555-0203 | 561-555-3423 | |
| Olson | Sherman | | JUD | NY Federal Bankruptcy Court | 516-555-0141 | 516-555-0142 | |
| Peters | Paulette | | PLA | | 770-555-9832 | | |
| Pierce | Walter | | OPCL | Law Offices of Walter Pierce | 612-555-3367 | 612-555-3409 | |
| Plummer | Adrian | 026 | CLNT | | 662-555-4021 | 662-555-4022 | |
| Redmond | Call | | DEF | State of Florida | 305-555-8267 | 305-555-8548 | |
| Reed | Leonard | 027 | CLNT | Reed Electronics | 305-555-9926 | | |
| Sanders | Gloria | 045 | CLNT | | 919-555-6565 | | |
| Sawyer | Louise | 028 | CLNT | | 305-555-0792 | 305-555-2413 | |
| Shah | Rudy | | WTNS | Shah Unlimited | 305-555-4541 | 305-555-4845 | |
| Sharp | Tommy | 029 | CLNT | General Properties Development, I... | 305-555-6333 | 305-555-6334 | |
| Shearer | Elizabeth | | WTNS | MegaTech Computers, Inc. | 305-555-4548 | 305-555-9874 | |
| Shelby | Luke | | WTNS | Medical Case Management, Inc. | 612-555-1269 | 612-555-1290 | |
| Sherman | Friedrick | 030 | CLNT | MegaTech Computers | 305-555-4344 | 305-555-7444 | |
| Sherman | Friedrick | 030.1 | CLNT | MegaTech Computers | 305-555-4344 | 305-555-7444 | |
| Simon | Clifford | | PLA | | 547-555-8523 | | |
| Smith | Rachel | | DEF | | 842-555-8419 | | |
| Smith | Roger | 031 | CLNT | | 612-555-1276 | | |
| Smithson | Hary | 032 | CLNT | Megatech Inc. | 305-555-1254 | | |
| State of Florida | | | DEF | State of Florida | 850-555-9874 | 850-555-7645 | |
| Sufoni | Walter | | EXPT | Alland Consulting, Inc | 212-555-6549 | 212-555-6578 | sufc |
| Thorppe | Jay | | INS | All American Insurance Company | 404-555-4747 | 404-555-3803 | |
| Thomas Title Insurance Company | | | COR | Thomas Title Insurance Company | 804-555-9012 | 804-555-7654 | infor |
| Tran | Huang | | OPCL | Chanson, Tran & Mendes | 212-555-7754 | 212-555-9844 | Hue |
| Treadway | Patrick | | OPCL | District Attorney's Office | 407-555-9834 | 407-555-7773 | |
| Tubodyne | William | 033 | CLNT | DFR Software | 404-555-5673 | | |

2. Type **Mol**

The letters typed appear in the **QuickPik** box and your cursor will move to the first occurrence of the typed letters.



Once you are in the list, just start typing and the QuickPik will appear. The QuickPik box will display for 2.5 seconds and then it will disappear from the screen (the QuickPik reset time can be changed in File> Setup> General>, User level>, Lists tab).

3. Press **Page Down**

You can move through a list with Page Up and Page Down.

4. Press **Home**

Your cursor will move to the top of the screen.
Press **End** to move to the bottom of the screen.

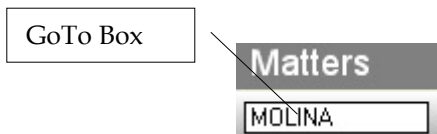
5. Press **Ctrl + Home**

Move to the top of the list.
Press **Ctrl+End** to move to the end of the list.

6. Click  on the **Vertical Scroll bar**

Use the elevator button to Scroll down the list. You will see a view box with the matter reference.

Use the **Horizontal Scroll bar** to view more columns.

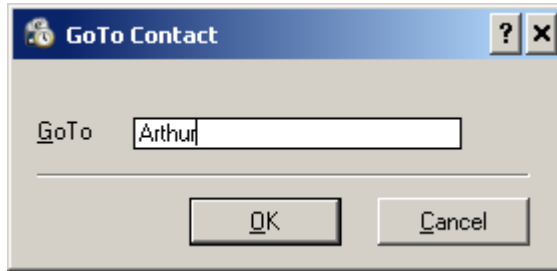
7. Click in the **GoTo** box

The GoTo box is located in the top left-hand corner of the list screen.

The GoTo box provides an **alternate** method of locating a name in the list.



You can also press **Ctrl+G** to display the GoTo box.



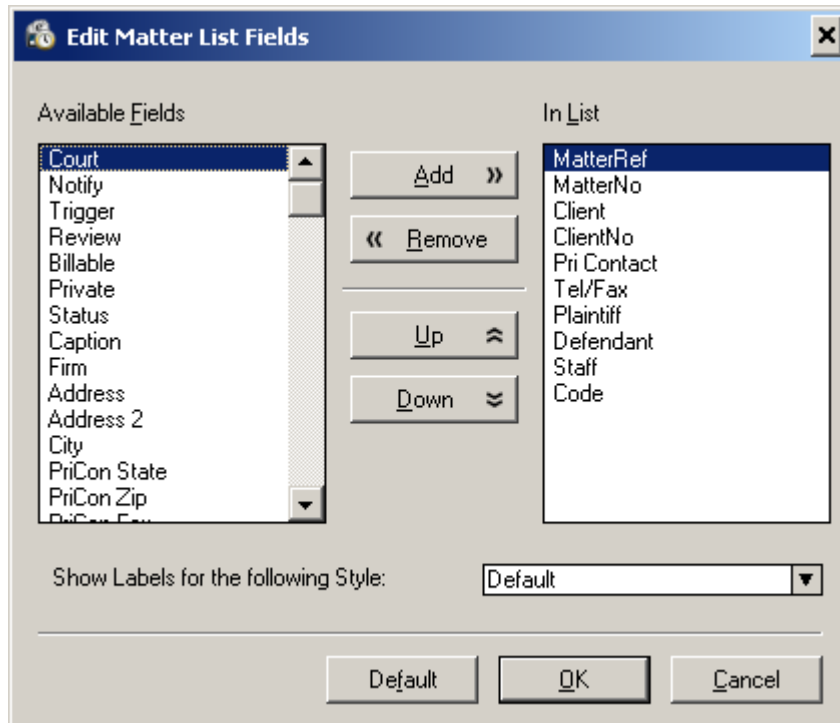
- 8. Type **Arthur** Type all or part of the name.
The cursor does not move until you press Tab or Okay.




- 9. Press **Tab** The indicated record is located.

Changing Columns

Open the Matter List. With your mouse pointer anywhere on the row of column headers, right-click and select *Edit Columns*.

On the left are fields on the forms of the records in the selected list. On the right are the fields (columns) already on the list, in the order in which they appear.





| <i>Procedures</i> | <i>Comments/Prompts</i> |
|--|---|
| 1. On the left, locate the field Opp Atty . | The 'Available Fields' shows the columns (fields) on your form. |
| 2. Add the field using the  Add button. | Add the desired column to the list. The field enters at the bottom of the list. |
| 3. From 'In List' Highlight the Opp Atty field and click the  Up button. | Put the columns in the desired order. |
| 4. Click  OK to save this selection. | The settings are remembered for this list for this user. |

Changing the Column Width

Dragging the column border in a column heading can easily change the width of the column. The changed width is automatically saved.

Do this first: Open the Contact List.

| <i>Procedures</i> | <i>Comments/Prompts</i> |
|---|---|
| 1. Position your cursor to the right of the Last Name Column Heading | Your cursor will change to a double-headed arrow.  |
| 2. Drag the double-headed arrow to the right or left | The column width will change as you drag the mouse. |

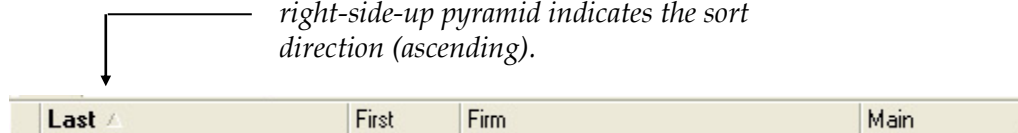
 *The Column Width is automatically saved for the current user/list.*

Sorting in a List


Each record type is displayed with a specified default sort order. Simply clicking on the column heading that represents the column you'd like to sort on can change the sort order. An arrow will appear next to the column heading indicating the sort order. Click on the column heading a second time to reverse the sort order.

The sort order remains in affect as long as the window remains open. Once the window is closed, the sort order will return to the default.

The bold column is the selected sort. The right-side-up pyramid indicates the sort direction (ascending).




| <i>Procedures</i> | <i>Comments/Prompts</i> |
|--|---|
| 1. Open the Matter List. Click on the Column Heading Mat No | The records are now sorted by Matter Number. <i>Notice the arrow pointing up next to the column heading—the records are sorted in ascending order.</i> |
| 2. Click on the Column Heading a second time | The column is now sorted in descending order. |
| 3. Click on Mat Ref | Set the sort order to another column. |

 *The sort order will remain set until you close the record window. When you return to this record type, the sort order will be set back to the default.*



 *You set default sort orders at a Program Level Setup, (Alt+Shift+P), program setup, lists, OR at a User Level (Alt+Shift+U), user level, Lists.*

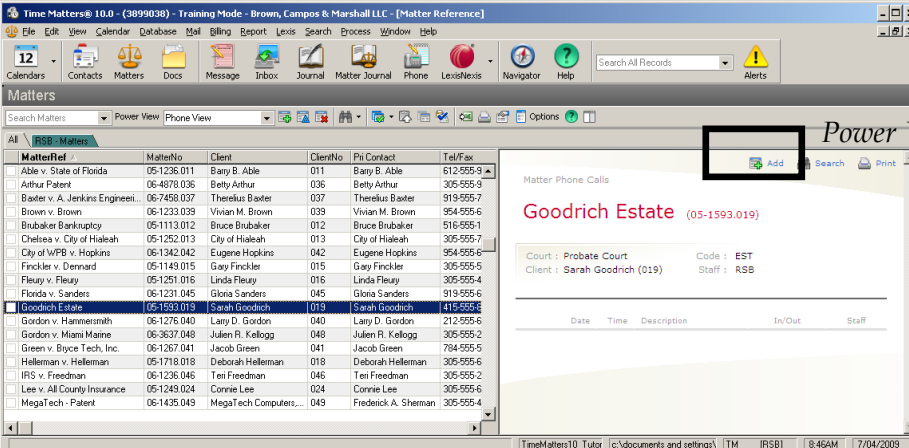
Views (Power Views)

Each record on a list may also have a side or bottom view of selected details from the highlighted record. Click on the  icon on the list toolbar to toggle between no Views, or any one of the pre-selected types of Power Views.

Procedures

Comments/Prompts

- On the list toolbar, Click on the Power View icon  to activate the desired side or bottom View location.
- Click on the top matter. On the list toolbar click on  and select **Phone View**.
- In the Power View area, above the date column, click on **Phone** **Phone**.
- In the Power View area click **Add** **Add**.
- Click **cancel**. Close the form without saving.



The screenshot shows the TimeMatters 10.0 interface. The main window displays a list of matters with columns for MatterRef, MatterNo, Client, ClientNo, Pri Contact, and Tel/Fax. The 'Goodrich Estate' record is selected. To the right, the Power View area is open, showing details for 'Goodrich Estate (05-1593.019)'. A green arrow points to the 'Power View Area' label, which is positioned over the 'Add' button in the Power View area.

| MatterRef | MatterNo | Client | ClientNo | Pri Contact | Tel/Fax |
|---------------------------------|--------------------|-----------------------|------------|-----------------------|------------------|
| Able v. State of Florida | 05-1236.011 | Bary B. Able | 011 | Bary B. Able | 612-555-9 |
| Arthur Patent | 06-4878.036 | Betty Arthur | 036 | Betty Arthur | 305-555-9 |
| Baxter v. A. Jenkins Enginee... | 06-7458.037 | Therekus Baxter | 037 | Therekus Baxter | 919-555-7 |
| Brown v. Brown | 06-1233.039 | Vivian M. Brown | 039 | Vivian M. Brown | 954-555-6 |
| Brubaker Bankruptcy | 05-1113.012 | Bruce Brubaker | 012 | Bruce Brubaker | 516-555-1 |
| Chelsea v. City of Hialeah | 05-1252.013 | City of Hialeah | 013 | City of Hialeah | 305-555-7 |
| City of WFB v. Hopkins | 06-1342.042 | Eugene Hopkins | 042 | Eugene Hopkins | 954-555-6 |
| Finckler v. Derrard | 05-1143.015 | Gary Finckler | 015 | Gary Finckler | 305-555-5 |
| Fleury v. Fleury | 05-1251.016 | Linda Fleury | 016 | Linda Fleury | 305-555-4 |
| Florida v. Sanders | 06-1231.045 | Gloria Sanders | 045 | Gloria Sanders | 919-555-6 |
| Goodrich Estate | 05-1593.019 | Sarah Goodrich | 019 | Sarah Goodrich | 415-555-6 |
| Gordon v. Hammersmith | 06-1276.040 | Lary D. Gordon | 040 | Lary D. Gordon | 212-555-6 |
| Gordon v. Miami Marine | 06-3637.048 | Juden R. Kellogg | 048 | Juden R. Kellogg | 305-555-2 |
| Green v. Bryce Tech, Inc. | 06-1267.041 | Jacob Green | 041 | Jacob Green | 784-555-5 |
| Helleman v. Helleman | 05-1718.018 | Deborah Helleman | 018 | Deborah Helleman | 305-555-6 |
| IRS v. Freedman | 06-1236.046 | Teri Freedman | 046 | Teri Freedman | 305-555-2 |
| Lee v. All County Insurance | 05-1249.024 | Connie Lee | 024 | Connie Lee | 305-555-6 |
| MegaTech - Patent | 06-1435.049 | MegaTech Computers... | 049 | Frederick A. Sherman | 305-555-4 |

Working with Update Forms

Forms are used to enter, view and update data in each of the record types. Each form is a collection of fields containing the information for any one record. Forms contain unique fields in addition to common fields found on all the record forms. It is helpful to understand the information contained in the various fields before attempting to search data, run reports and perform other procedures.

Each form is divided into sections indicated by the descriptive tabs at the top of the form. The primary, secondary, and additional tabs contain pre-defined fields, as well as, user-definable fields, which can be customized to the requirements of each firm and each department. Custom fields can be linked to specific classification codes using **Form Styles**. For example, if you select the Personal Injury matter classification code, you can set the form to display fields which are specific to this type of Matter. Form styles are set using File> Setup> Templates>Form Styles.

Form Toolbar

Form Tabs

Areas 1 & 2

| | | | |
|-------------|---------------------------|-----------|---|
| MatterRef | Molina v. United Builders | Code | PIJPI Plaintiff |
| MatterNo | 05-1423.025 | Court | Superior Court |
| Plaintiff | Rafael S. Molina | Defendant | United Builders |
| Client | Rafael S. Molina | 025 | <input type="checkbox"/> Notify <input type="checkbox"/> Trigger <input type="checkbox"/> Review <input checked="" type="checkbox"/> Billable <input type="checkbox"/> Private Status |
| Area 2 | Pri Contact | Area 3 | Adjuster |
| Firm | Rafael S. Molina | Firm | Catherine P. Bennett |
| Address | 14568 8th Street | Firm | Davis and Woodbridge |
| Address 2 | Apt. 7A | Address | 45 Biscayne Boulevard |
| City | Miami FL 33154 | Address 2 | Suite 1200 |
| Tel/Fax | 305-555-1616 | City | Miami FL 33131 |
| Area 4 | DOI | Tel/Fax | 305-555-1702 305-555-7869 |
| Description | 1/09/1801 | Area 5 | SQL |
| Location | | Custom7 | 1/09/1801 |
| Custom4 | | Damages | \$15,000 |
| Custom5 | | Custom10 | |
| Custom6 | | Custom11 | |
| Area 6 | | Custom12 | |

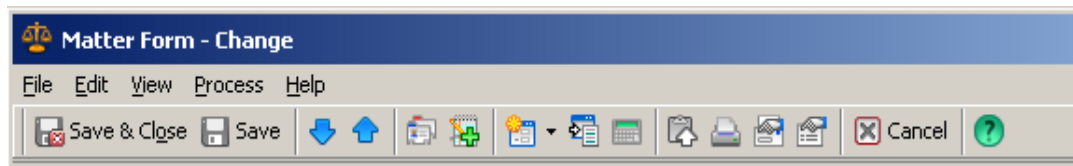
Form Areas

Forms are separated into Areas with each area numbered in the top-left corner. The area labels themselves can be customized. **Area 1** remains on the screen as you move through the other tabs. This Area contains pertinent information for the selected record.



Press **Alt + the number of the area** to move to the first field in that Area.

Form Toolbar



The **Form toolbar** displays icons for the most commonly used form features. Activating a feature from this toolbar will only affect the currently displayed form.

Form Tabs



Form tabs are used to organize data for the current record.

| | |
|-------------------|--|
| Primary | Displays the most important information for the record. This Tab contains six areas of fields with area four and five containing user-definable fields |
| Secondary | Provides additional areas for addresses and more user-definable fields. (Only available on the Matter and Contact forms.) |
| Additional | Provides areas for user-definable fields. (Only available on the Matter and Contact forms.) |
| Related | Displays all records that are linked to the current record. This Tab can answer questions like “show me everything I have for this Client or Matter”. |
| Other Tabs | Notes, Documents, Phone, E-mail, and other tabs display a list of those specific record types associated with this contact or matter. All relevant information for the file can be found viewed, and edited from one location. |

Drop-down ▾ and Lookup ... Fields

A **drop-down** ▾ field will display a list of available choices. You can only choose a single selection from a drop-down list.




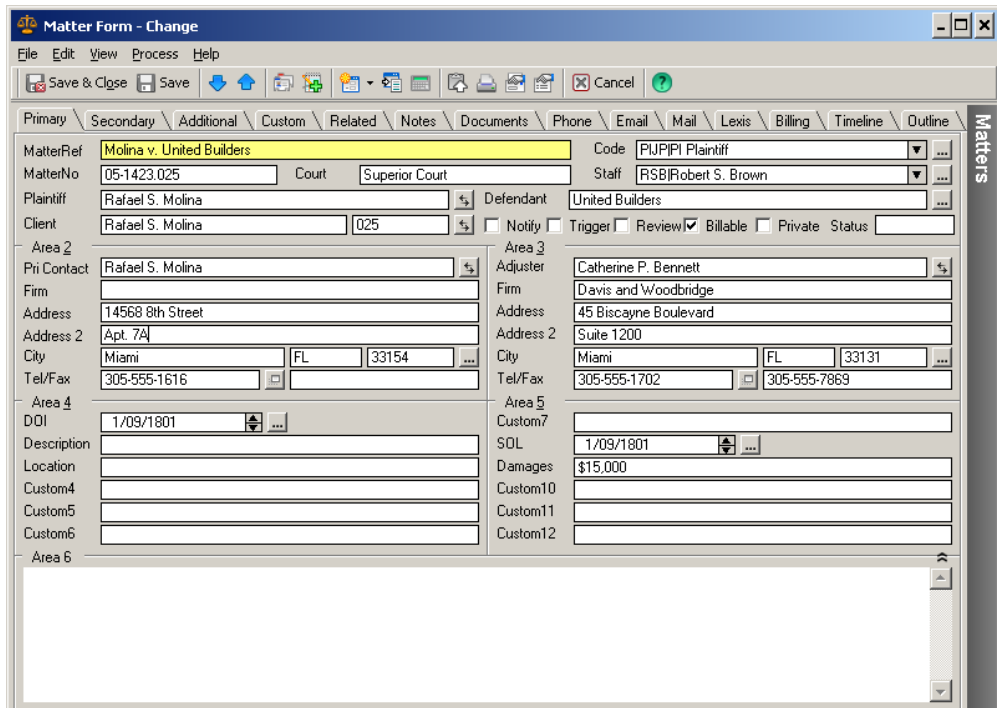
Lookup fields ... are used to link records, or open the table of the field type. Click on the Lookup field to display a list of associated records to choose from. Using 'Code' as an example, you can use a lookup field to add a new code, or to select multiple codes.



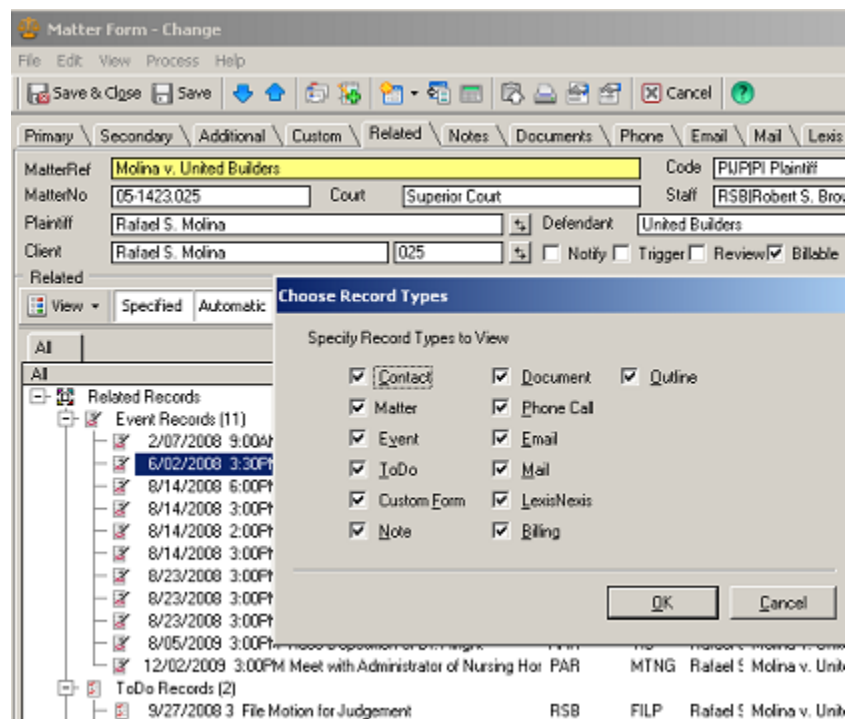
From within the field, press **F2** as a shortcut for Lookup.

Viewing an Existing Form



- | <i>Procedures</i> | <i>Comments/Prompts</i> |
|--|---|
| 1. Locate the Molina v United Builders Matter | Use QuickPik or the GoTo box to locate the desired record. |
| 2. Press Enter | Highlight a record and press Enter key to open. <i>You can also double-click on the desired record, or click on the change icon.</i>  |



3. Click on **Secondary** View the information on the secondary screen.
Notice the information in Area 1 remains on the screen at all times.
4. Click on **Additional** The Additional Tab includes several areas of customizable fields.
5. Click on **Related**, and then Click on **View** Select the desired types of records related to this Matter.










You can also press **Ctrl+Tab** to move from Tab to Tab.

6. Click on **Primary** Move back to the Primary Tab.
7. On the form toolbar, Click on  to move to the **Previous Record** or  to move to the **Next Record**
*You can also press **CTRL >** or **Ctrl <** to move through the records on the list.*
8. Click on **Close** Close this record and return to the main Matter list.

Elements of a Form

Do this first: Open the MicroTech v. Megatech Matter.

| <i>Procedures</i> | <i>Comments/Prompts</i> |
|---|---|
| 1. Press Tab | Move to the next field with the Tab key. Press Shift+Tab to move back a field. |
| 2. Notice the  drop-down arrow | A down triangle indicates a drop-down box, which provides a list of choices. |
| 3. Notice the  Lookup button for Client | The  indicates a Lookup field, which enables you to link other records to this record. For example, a list of Contacts will appear when linking a Contact to a Matter. |
|  The Lookup  icon will change to  icon when the link has been made to relate the displayed record to another record. | |
|  Press F2 as a shortcut to Lookup. | |
| 4. Click on X Close | The form is closed and you are returned to the Matter List. |

**Thank you for using our training
guide for Time Matters.**



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