

Time Record Entry in Time Matters

Bar = Solid, Header Color = Code. Also click on Display Fields and move Code to the top. Click OK. Pick the 14 Days view and Staff = your initials. Colors for the Codes are set in File > Features Setup > Classification Codes.

For simple invoicing, Time Matters includes an invoice report and a few invoice formatting options. Most offices that need to generate invoices or statements will benefit from integrating Time Matters with another time and billing program.

Time entries in Time Matters can be invoiced using one of many popular time and billing programs, including QuickBooks Pro 2002, PCLaw, TABS, Timeslips and Juris. Each user needs to be licensed to use the billing program in order to use important Time Matters functions. With some programs such as Timeslips and QuickBooks Pro, users may be able to obtain a special billing program license at a discount if they do not need to use the billing program directly. For more information about billing program integration requirements and costs, speak with an authorized independent consultant or call Time Matters.

Summary of Time Record Entry Steps

1. Select the Start Time	Double-click on the Calendar
2. Fill in the Duration	For example, type: 1.25
3. Type or Pick a Code	Use the drop-down button to pick from the Code list
4. Complete the Description	Let the AutoEntry form fill it and add more as needed
5. Select a Matter	Tab to the Matter field, click the Lookup button
6. Save and Close	Click on the Save & Close button

Steps for Time Record Entry

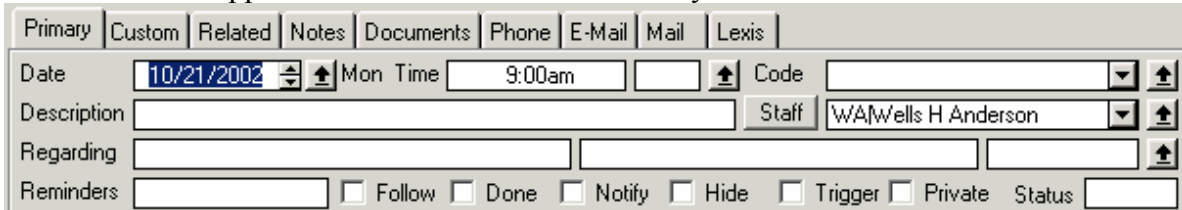
>> Select the Start Time

Double-click on the Calendar in the block for the Start Time of your time record.

Events	Mon, Oct 21
8:00a	
:30a	
9:00a	
:30a	
10:00a	
:30a	
11:00a	
:30a	

Time Record Entry in Time Matters

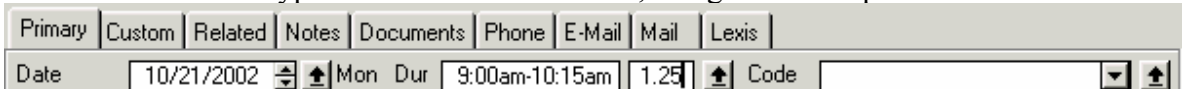
The Event form appears with the date and time already filled in.




The screenshot shows the top portion of the Time Matters software interface. At the top, there are several tabs: Primary, Custom, Related, Notes, Documents, Phone, E-Mail, Mail, and Lexis. Below the tabs, the 'Date' field is set to '10/21/2002' and the 'Time' field is set to '9:00am'. The 'Code' field is empty. The 'Description' field is empty. The 'Staff' field is set to 'WA/Wells H Anderson'. There are also checkboxes for 'Follow', 'Done', 'Notify', 'Hide', 'Trigger', 'Private', and a 'Status' field.

>> Fill in the Duration

Press Tab twice and type in the Duration in hours, using a decimal point.

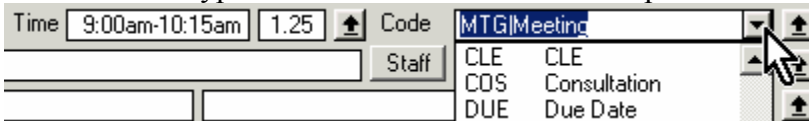


The screenshot shows the 'Time' field now containing '9:00am-10:15am' and the 'Dur' (Duration) field containing '1.25'. The 'Code' field remains empty.

Note: Another way is to type the Start and Stop times or click the arrow button  and click on the hour, minute and am/pm buttons.

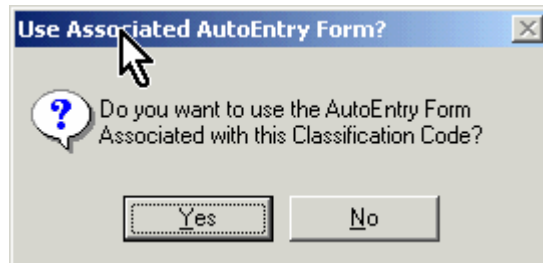
>> Type or Pick a Code

Press Tab and type in the Code or click on the drop-down button and pick it.



The screenshot shows the 'Code' dropdown menu open, displaying a list of options: 'CLE CLE', 'COS Consultation', and 'DUE Due Date'. The 'MTGMeeting' option is currently selected. A mouse cursor is pointing at the 'DUE Due Date' option.

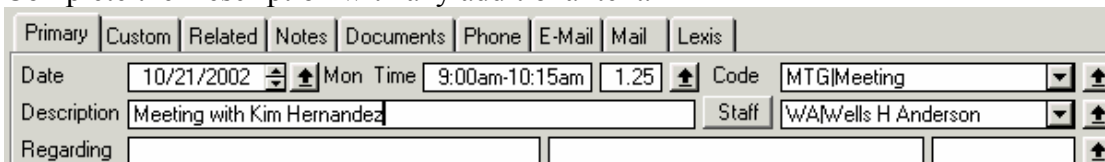
AutoEntry forms save time. If your code has one, click Yes in the window that pops up:



AutoEntry forms are included in Feature Packages that you can purchase from a Time Matters consultant or you can create your own. They will enter Descriptions automatically.

>> Fill in the Description

Complete the Description with any additional text.



The screenshot shows the 'Description' field now containing the text 'Meeting with Kim Hernandez'. The 'Code' field is now set to 'MTGMeeting'.


Time Record Entry in Time Matters

>> Select a Matter

Press the Tab key three times to skip past the Staff field and first field in the Regarding row, landing in the Matter (or Case) field.

The screenshot shows the 'Regarding' field in the Time Matters software. The 'Regarding' field is currently set to 'Amann Project'. The 'MatterRef' field is empty. A mouse cursor is pointing to the 'MatterRef' field. The 'Staff' field is set to 'WA/Wells H Anderson'. The 'Date' is '10/21/2002' and the 'Time' is '9:00am-10:15am'. The 'Code' is 'MTG|Meeting'. The 'Description' is 'Meeting with Kim Hernandez'. There are several checkboxes for 'Reminders' (Follow, Done, Notify, Hide, Trigger, Private) and a 'Status' field.

Notice that the label on the left changes from Regarding to MatterRef (or Case Ref).

Click on the Lookup button  to the right. Select the Matter (or Case) in the window that appears by starting to type its name.

Double-click on the Matter.

The screenshot shows the 'Active' window in the Time Matters software. The window has two tabs: 'Active' and 'Archive'. The 'Active' tab is selected. The window contains a table with three columns: 'Case Ref', 'Matter No', and 'Code'. The table has three rows: 'Amann Project', 'Chartwell1', and 'Cleveland.TM'. The 'Amann Project' row is highlighted. A mouse cursor is pointing to the 'Amann Project' row. There are 'OK' and 'Add' buttons on the right side of the window.

Case Ref	Matter No	Code
Amann Project	98-0279	MAT
Chartwell1	00-207	MAT
Cleveland.TM		MAT

>> Save and Close

Now that the Time Record is complete, press the Save & Close button.

The screenshot shows the 'Save & Close' button being clicked in the Time Matters software. The 'Save & Close' button is highlighted. The 'Regarding' field is now set to 'Amann, Greg'. The 'MatterRef' field is set to 'Amann Project'. The 'Code' is '98-0279'. The 'Date' is '10/21/2002' and the 'Time' is '9:00am-10:15am'. The 'Code' is 'MTG|Meeting'. The 'Description' is 'Meeting with Kim Hernandez'. The 'Staff' field is set to 'WA/Wells H Anderson'. There are several checkboxes for 'Reminders' (Follow, Done, Notify, Hide, Trigger, Private) and a 'Status' field.

Your Time Record now appears on the Calendar.

The screenshot shows a calendar for Monday, October 21. The calendar has a grid of events. The event 'MTG- Meeting with Kim Hernandez' is highlighted in orange and occurs from 9:00a to 10:30a. The other events are yellow.

Events	Mon, Oct 21
8:00a	
:30a	
9:00a	MTG- Meeting with Kim Hernandez
:30a	
10:00a	
:30a	
11:00a	
:30a	

Additional Details on Entering Time Records

>> Narrative Billing

Some clients and courts require very detailed time records. If you need to provide long descriptions of your work, use the Memo field. You need to change a setting so that text in the Memo field can be transferred to your invoices. Go to File > Program Setup > Program Level > Links > Billing Options > Setup. This option varies depending on whether you are using Time Matters for invoicing or linking to another software program. You will save time if you enter narrative billing descriptions as you work. One approach is to create a new time record, describe the work you are starting in the Memo, then add to that description as you work. You can minimize the record, parking it in the lower left corner of Time Matters, then return to it periodically to add to the memo.

>> Separating Billable from Non-Billable Events

All time records entered in Time Matters show up as events on the calendar, along with other events that are not related to client matters. Billable and non-billable events need to be identified separately so that only the billable events are invoiced.

Many firms use one group of classification codes for billable events and another group of codes for non-billable events. One way is to begin all non-billable codes with the letter X. For example, MTG could be the code for a billable meeting and XMTG the code for a non-billable meeting. This approach has the benefit of grouping all the non-billable codes together.

Different colors can be assigned for billable and non-billable services. Shades of green are often used for billable services.

>> Using the Done Field

You can use the Done field to mark records as ready for billing. Though this involves an additional step before time records are ready for processing, it is easy to do. Just right-click on a record on the Calendar. You have the option to mark it Done without having to open it. Some billable events are placed on the calendar in advance. The Done field helps distinguish between events that were merely scheduled and those that actually occurred. Checking the event as Done also signifies that the narrative has been completed and any adjustment has been made to the duration.

>> Keyboard Shortcuts

Time Field – Instead of doing mental math, sometimes it is easier to enter a Start Time and a Stop Time. Let Time Matters calculate the Duration. You can enter numbers into the Time field in a variety of ways. For example:

What you type	Result in Time	Result in Duration
11-1	11:00am- 1:00pm	2
930-1045	9:30am-10:45am	1.25
5-720p	5:00pm- 7:20pm	2.33 Note: You need to use the “p” for pm. Otherwise, the default for 7:00 is am.

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Code Field – With the cursor in the Code field, the Down-Arrow key will cause the drop-down list of Codes to appear. You can press the Down-Arrow key repeatedly to select a Code. Press Tab to leave the field.


Staff Field - The Staff Field can fill in automatically with the initials of the Default Staff person. The Default Staff person's initials appear in square brackets [WA] in the lower right corner of Time Matters. This person is linked to the user in File > Security Setup.

To customize the Staff field so that it will fill in automatically, right-click on it and click Customize Field. Click the check box for Enter Staff on ADD.

Regarding Fields – With the cursor in a Regarding field, use the F2 key to pop up a Lookup window instead of clicking the Lookup button. For example, to select a Matter using the Matter Number, type it into the last field or click in the last field and press F2.

Memo Field - You can jump to the Memo field by pressing the key combination Alt-6.

>> Using the Timer

The Timer is available to track the actual time you have spent on working on a particular task. You can start the Timer by clicking the Stopwatch icon.  How the Time behaves when you open or minimize a record can be changed. Go to: File > Program Setup > User Level > Forms Select: Event and click on: Set Form Options > Timer

>> Billing from Other Kinds of Records

Records other than Events also have Timer icons and can be used to create billing records. This subject merits its own white paper since it involves making a significant change in how you work with Time Matters.

Sending Time Records to Billing

The procedures for sending time records to billing vary depending on which billing program you are using. In general, the billable Event records (your time records) are marked in the Event list using a filter to select the billable records. Then Billing Records are created from these records. The Billing Records are transferred to a linked time and billing program or placed on invoices within Time Matters. The subject of invoicing with Time Matters merits its own white paper.

Conclusion

When you bill your time within Time Matters, you are spared the hassle of dealing with the quirks and differing screens of another program. When events such as meetings, teleconferences and appearances have been scheduled in advance, you are spared from having to re-enter their basic information.

Entering new time records in Time Matters can become a routine, 6-step process quickly repeated throughout the day:

Start time > Duration > Code > Description > Matter > Save & Close

Time Record Entry in Time Matters

Unlike a paper timesheet, Time Matters never gets buried on your desk. You can see a colorful view of billable time and non-billable time over the course of a day, week, or 4-week period. Billing on your calendar helps you capture all your work.

Though keeping time may be an unwelcome aspect of law practice, at least Time Matters can streamline the process and even produce more revenue.

Questions? Comments? Please write or call:

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