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# FROM ARITA'S DESK

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Document Management Issue

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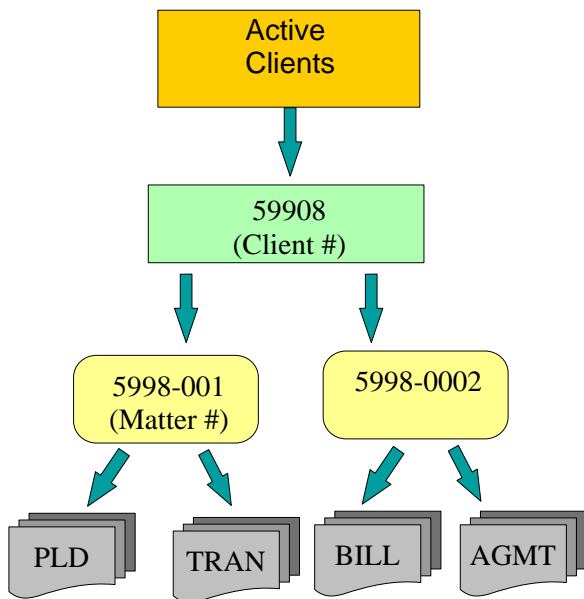
## Hassle-Free Document Management

*Time Matters 8.0 Makes it even Easier to Profile your Documents*

More and more firms have taken an interest in using Time Matters to manage their documents. Though one of the selling points for the program, most firms are slow to implement the document management feature. This article describes the steps for getting document management up and running in your office.

*Examine your document storage conventions*

Before you automate document management, you must first examine your document storage conventions. Are all client documents stored centrally? What is your file and folder naming convention? Do you have rules for creating subfolders for clients?



There is no one correct way for storing and naming documents. The key is to be consistent, and to use software to help your firm maintain consistency. This diagram is an example of a common document storage and naming convention.

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*Use Auto-Naming*

Whatever your storage and naming convention, it's easier to maintain it if you use Time Matters' Auto-Naming feature. Just associate your folders with fields on the Time Matters Document form, and Time Matters will save your documents to the appropriate folder.

*Use the TM Save Button*

When you install Time Matters, it adds a toolbar to your Office applications. The toolbar includes a TMSave button. Use this button instead of the usual File Save button to save your documents. TMSave presents a Time Matters document form which profiles your document and saves it in the designated folder. A *profile* is a document management system (DMS) term for a database record that contains information about your document (Author, Client, Matter, Date, etc.) Time Matters profiles are called Document records. They include a link to Go To the profiled document. I'm often asked "Is my document still in Word?" Yes. The document is still in its native format. The Time Matters Document record just describes and points to the document. The TM Save button is available in these applications:

- Word • WordPerfect • Excel • Powerpoint
- Internet Explorer • Firefox
- Acrobat Standard • Acrobat Reader

Outlook has a TMConnect button that saves emails to Time Matters as TM Email records.

*Profile Existing Documents*

Your DMS is most effective when all documents for your clients have been profiled. Use the Send to Time Matters to profile an entire folder of existing documents in one process. Open the folder in Windows Explorer, select the files, right-click and select Send to Time Matters. It's quick, easy and flexible. (See illustration on next page.)

*Don't forget Outside Documents*

Scanned files from outside sources belong in Time Matters, too. If your scanner scans and opens the scanned file in PDF format, use the TMSave button in Acrobat to save and profile the document. If your scanner sends the scanned images to a

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*Hassle-Free Document Management (continued)*

designated folder without opening the file, profile them from Windows Explorer with the right-click option shown in Figure 1.

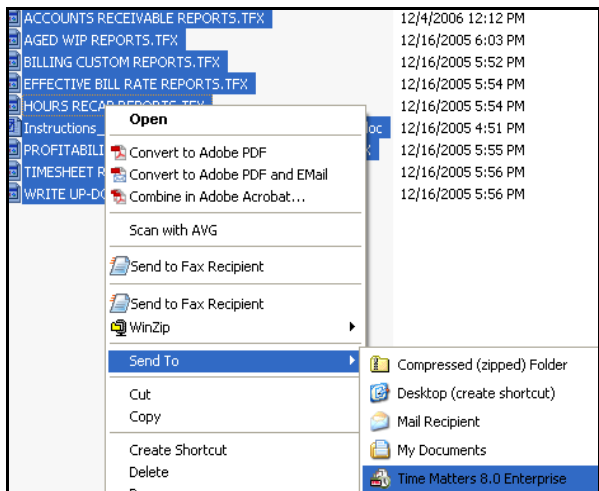


Figure 1 - Sending and Entire Folder of Documents to Time Matters

*Use the Documents Power View*

Matters Power Views provide a graphical listing of records related to a matter. In the customized Power View shown in Figure 2, the date links to the Time Matters Document profile record and the Description is a hyperlink that opens the document.

*Integrate your Merge Forms with Time Matters*

Time Matters DMS can help to streamline your document assembly tasks. Use Time Matters as the launch point for assembly of your Word, WordPerfect or HotDocs templates.

Start with a Time Matters Document form and merge your template. Your automated document is “front end” profiled and assembled, all from the Document form. This automation takes some planning and configuration, but the results—quick and accurate document assembly and management—are well worth it.

*Use Classification Codes*

Time Matters provides a Classification Code box on all records. The codes help you to better organize your data. For a more effective DMS, look at the Classification Codes for Documents. Time Matters includes starter codes. Go to File, Setup, Codes, Classification Codes, Documents and print the list of codes. Edit the list as appropriate for your firm. Keep in mind that the Code may be used in the auto-naming formula to designate a sub-folder for documents. See the bottom tier on the chart on page 1. To enforce proper coding of documents, you may customize the Document form to make the code field a required field.

*Develop a System for Archiving Documents*

When you close a case, you may elect to archive the Matter record in Time Matters. Many firms also move documents for closed files to an Inactive Clients folder on the server. When you do this, use Time Matters’ Document Path utility to update records to point to the closed file area. You may also use Time Matters’ tag and process function to move the Document records to the Archives area.

*Get Started!*

You have the steps. Now, get started. Use TMSave to save the next document you create. Become familiar with the Document profile form. Form a team to work out classification codes, naming conventions and examine your current file folder hierarchy. Clear up any inconsistencies. Don’t be afraid of making a mistake. Many systems are developed over time through trial and error. Time Matters is flexible. You can revise codes, mass update records and build and change automated steps as needed.

MatterNo	Client	ClientNo	Pri Cont.
03-1236.1	Barry B. Able	001	Barry
04-4878.1	Betty Arthur	004	Betty
04-7458.22	Therelius Baxter	005	Ther
02-1233.2	Vivian M. Brown	007	Vivie
04-1113.1	Bruce Brubaker	008	Bruc
03-1252.1	City of Hialeah	009	City
04-1342.4	Eugene Hopkins	019	Euge
02-1149.1	Gary Finckler	011	Gary
02-1251.1	Linda Fleury	012	Lind
03-1231.1	Gloria Sanders		Glori
03-1593.1	Sarah Goodrich	014	Sara

Date	Time	Description	Doc #	Staff
10/28/2008	3:33PM	Reminder of Upcoming Motion to Dismiss Hearing	3702	MBA
10/28/2008	10:08AM	Client Letter	3704	RSB
9/08/2008	5:11PM	Able Interrog Letter	2890	RSB

Figure 2 - Document Power View

## Certification Update

LexisNexis Practice Management Consultants (CIC's) undergo rigorous training and testing for each new product and version. I am happy to report that I am certified on all versions of Time Matters and Billing Matters. Last year I became certified on HotDocs and PCLaw to complete my certification on all LexisNexis Practice Management software. I am also certified on all versions of Timeslips through Timeslips 2006. Timeslips is a product of Sage.

**Need Help Quick?**

Sign up for an online support session. Go to [www.absims.com](http://www.absims.com) and click on Support Session Sign-up.

