

Table of Contents – Timeslips 2015 Advanced Training

LESSON 1: MY LISTS	6
OVERVIEW	6
CREATING MY LISTS	6
VIEWING MY LISTS	11
TOGGLE BETWEEN MY LISTS AND VIEW ALL	11
EXERCISE 1.....	12
LESSON 2: SECURITY AND THE AUDIT TRAIL.....	14
DATABASE SECURITY	14
SECURITY PROFILES.....	17
AUDIT TRAILS	21
SELECTING DATA TO TRACK.....	23
VIEWING AUDIT TRAIL DATA	24
PRINTING AUDIT TRAIL DATA	26
PURGING AUDIT TRAILS	27
DISABLING AUDIT TRAILS.....	29
EXERCISE 2.....	31
LESSON 3: DATA ENTRY ASSISTANT AND THE FIRM ASSISTANT.....	33
DATA ENTRY ASSISTANT	33
FIRM ASSISTANT	38
PRINTING FIRM ASSISTANT INFORMATION.....	40
EXERCISE 3.....	41
LESSON 4: HIDING DATA WITHIN THE DATABASE.....	43
HIDING AND REMOVING DATA	43
CLOSING SLIPS	43
INCLUDING CLOSED SLIPS ON REPORTS	46
REOPENING SLIPS	48
HIDING AND DELETING NAMES	49
CHANGING THE CLASSIFICATION FOR INDIVIDUAL NAMES.....	50
CHANGING CLASSIFICATION ON MULTIPLE NAMES.....	51
EXERCISE 4.....	53
LESSON 5: ARCHIVING, PURGING, AND COMBINING.....	55
ARCHIVING SLIPS.....	55
COMBINE - RESTORING ARCHIVES	56
INCLUDING TEMPORARY SLIPS ON REPORTS.....	58
REMOVING TEMPORARY SLIPS.....	59
PURGING DATA AND CLOSING PERIODS	59
EXERCISE 5.....	66
LESSON 6: CALENDAR.....	68
VIEWING THE CALENDAR	68
NAVIGATING THE CALENDAR SCREEN	69
ADDING A MEETING	70
SET MEETING RECURRENCE.....	72
ADDING A TO DO	73
CHANGE CALENDAR SETTINGS	74

EXERCISE 6.....	75
LESSON 7: ALERTS.....	78
ALERTS.....	78
CREATING ALERTS	78
THE ALERT LIST DIALOG BOX.....	82
LESSON 8: CREATING CUSTOMIZED REPORTS	86
CUSTOMIZE AND SAVE A STANDARD REPORT	86
CREATE A USER-DEFINED REPORT.....	93
CUSTOMIZE EXISTING REPORTS	99
EXERCISE 8.....	108
LESSON 9: MAIL MERGE	112
CREATING A MAIL MERGE USING A DEFAULT TEMPLATE	112
CREATING A MERGE TEMPLATE	120
LESSON 10: IMPORTING AND EXPORTING BILL LAYOUTS.....	126
IMPORTING BILL LAYOUTS	126
EXPORTING BILL LAYOUTS	128
EXERCISE 10.....	130
LESSON 11: STATION ADMINISTRATOR.....	132
STATION ADMINISTRATOR	132
USING DIAGNOSE THIS COMPUTER	134
TIMESLIPS LICENSES AND LOGINS	136
EXERCISE 11.....	137
APPENDIX: BACKING UP YOUR DATABASE.....	140
DAILY PROCEDURE	140
MANUALLY BACKING UP YOUR DATA	141
SCHEDULED BACKUP OF YOUR DATA.....	145