

## Table of Contents – Time Matters 16 Advanced Training

<b>LESSON 1: PROGRAM LEVEL SETTINGS</b> .....	<b>6</b>
GENERAL SETTINGS .....	6
FIRM SETTINGS .....	8
LISTS SETTINGS .....	9
PROGRAM LEVEL QUICK TABS.....	12
FORMS SETTINGS .....	17
LINKS SETTINGS .....	21
UPDATE SETTINGS .....	24
EXERCISE 1.....	27
<b>LESSON 2: SETTING UP STAFF, USER LOGINS &amp; GROUPS</b> .....	<b>29</b>
CREATING STAFF AND RESOURCES .....	29
CREATING USER LOGINS AND SETTING SECURITY .....	32
CREATING GROUPS.....	44
EXERCISE 2.....	47
<b>LESSON 3: CLASSIFICATION CODES</b> .....	<b>49</b>
CREATING CLASSIFICATION CODES.....	49
EXERCISE 3.....	52
<b>LESSON 4: ADVANCED SCHEDULING FEATURES</b> .....	<b>55</b>
SCHEDULE REPEATING EVENTS .....	55
DATE CALCULATOR.....	59
TRIGGERS.....	66
CHAIN TEMPLATES .....	69
EXERCISE 4.....	75
<b>LESSON 5: AUTOENTRY FORMS</b> .....	<b>77</b>
CREATING AN AUTOENTRY FORM .....	77
USING AN AUTOENTRY FORM.....	79
ASSOCIATING AN AUTOENTRY FORM WITH A CLASSIFICATION CODE .....	80
USING AN AUTOENTRY FORM WITH THE CLASSIFICATION CODE ASSOCIATION .....	82
EXERCISE 5.....	83
<b>LESSON 6: CUSTOM FIELDS</b> .....	<b>85</b>
CUSTOMIZING A USER FIELD .....	85
EXERCISE 6.....	90
<b>LESSON 7: FORM STYLES</b> .....	<b>93</b>
CREATING A FORM STYLE.....	93
ASSIGNING A FORM STYLE TO MULTIPLE CLASSIFICATION CODES .....	104
EXERCISE 7.....	105
<b>LESSON 8: CUSTOM FORMS</b> .....	<b>107</b>
CREATING A CUSTOM FORM TEMPLATE .....	107
USING A CUSTOM FORM TEMPLATE .....	109
USING THE DROP-DOWN CHOICE FIELD ON A CUSTOM FORM .....	112
ACCESSING CUSTOM FORMS FROM A LIST .....	113

EXERCISE 8.....	115
<b>LESSON 9: DOCUMENT SEARCH &amp; INDEXING.....</b>	<b>117</b>
PERFORMING A SEARCH.....	118
SAVE A DOCUMENT SEARCH.....	120
DOCUMENT INDEXING.....	122
EXERCISE 9.....	130
<b>LESSON 10: ARCHIVING RECORDS.....</b>	<b>133</b>
ARCHIVING A SINGLE RECORD.....	133
RESTORING AN ARCHIVE RECORD TO THE ACTIVE RECORD LIST.....	137
BATCH ARCHIVING.....	138
PROCEDURE FOR ARCHIVING CLOSED CASES & ASSOCIATED RECORDS.....	140
EXERCISE 10.....	145
<b>APPENDIX: DATABASE MAINTENANCE.....</b>	<b>148</b>
DAILY PROCEDURE – BACKUP DATABASE.....	148
MONTHLY PROCEDURE – RE-INDEX DATABASE.....	151