

Table of Contents – Timeslips 2017/Premium Advanced Training

LESSON 1: MY LISTS	6
OVERVIEW	6
CREATING MY LISTS FOR A TIMEKEEPER	6
VIEWING MY LISTS	11
TOGGLE BETWEEN MY LISTS AND VIEW ALL	11
LIMITING TASKS BY CLIENT	12
VIEWING LIMITED ACTIVITIES/TASKS	14
EXERCISE 1	16
LESSON 2: SECURITY AND THE AUDIT TRAIL	18
DATABASE SECURITY	18
SECURITY PROFILES	21
AUDIT TRAILS	25
SELECTING DATA TO TRACK	27
VIEWING AUDIT TRAIL DATA	28
PRINTING AUDIT TRAIL DATA	30
PURGING AUDIT TRAILS	31
DISABLING AUDIT TRAILS	32
EXERCISE 2	34
LESSON 3: DATA ENTRY ASSISTANT AND THE FIRM ASSISTANT	36
DATA ENTRY ASSISTANT	36
FIRM ASSISTANT	41
PRINTING FIRM ASSISTANT INFORMATION	43
EXERCISE 3	44
LESSON 4: HIDING DATA WITHIN THE DATABASE	46
HIDING AND REMOVING DATA	46
CLOSING SLIPS	46
INCLUDING CLOSED SLIPS ON REPORTS	49
REOPENING SLIPS	51
HIDING AND DELETING NAMES	52
CHANGING THE CLASSIFICATION FOR INDIVIDUAL NAMES	53
CHANGING CLASSIFICATION ON MULTIPLE NAMES	54
EXERCISE 4	56
LESSON 5: ARCHIVING, PURGING, AND COMBINING	58
ARCHIVING SLIPS	58
COMBINE - RESTORING ARCHIVES	59
INCLUDING TEMPORARY SLIPS ON REPORTS	61
REMOVING TEMPORARY SLIPS	62
PURGING DATA	62
EXERCISE 5	69
LESSON 6: CALENDAR	72
VIEWING THE CALENDAR	72
NAVIGATING THE CALENDAR SCREEN	73
ADDING A MEETING	74
SET MEETING RECURRENCE	76

ADDING A TO DO	77
CHANGE CALENDAR SETTINGS	78
EXERCISE 6.....	79
LESSON 7: ALERTS	82
ALERTS.....	82
CREATING ALERTS	82
THE ALERT LIST DIALOG BOX	86
LESSON 8: CREATING CUSTOMIZED REPORTS	90
CUSTOMIZE AND SAVE A STANDARD REPORT	90
CREATE A USER-DEFINED REPORT.....	97
CUSTOMIZE EXISTING REPORTS	103
EXERCISE 8.....	112
LESSON 9: MAIL MERGE	116
CREATING A MAIL MERGE USING A DEFAULT TEMPLATE.....	116
CREATING A MERGE TEMPLATE	124
LESSON 10: IMPORTING AND EXPORTING BILL LAYOUTS	128
IMPORTING BILL LAYOUTS	128
EXPORTING BILL LAYOUTS.....	130
EXERCISE 10	132
LESSON 11: TIMESLIPS ADMINISTRATOR.....	134
TIMESLIPS ADMINISTRATOR.....	134
USING DIAGNOSE THIS COMPUTER	136
TIMESLIPS LICENSES AND LOGINS	138
EXERCISE 11	139
APPENDIX: BACKING UP YOUR DATABASE.....	142
DAILY PROCEDURE.....	142
MANUALLY BACKING UP YOUR DATA	144
SCHEDULED BACKUP OF YOUR DATA.....	148