

## Table of Contents – Time Matters 14 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 .....   | 18         |
| LINKS SETTINGS .....   | 22         |
| UPDATE SETTINGS .....  | 25         |
| EXERCISE 1.....  | 28         |
| <b>LESSON 2: SETTING UP STAFF, USER LOGINS &amp; GROUPS</b> .....      | <b>30</b>  |
| CREATING STAFF AND RESOURCES .....                                     | 30         |
| CREATING USER LOGINS AND SETTING SECURITY .....                        | 33         |
| CREATING GROUPS.....   | 45         |
| EXERCISE 2.....  | 48         |
| <b>LESSON 3: CLASSIFICATION CODES</b> .....                            | <b>50</b>  |
| CREATING CLASSIFICATION CODES.....                                     | 50         |
| EXERCISE 3.....  | 53         |
| <b>LESSON 4: ADVANCED SCHEDULING FEATURES</b> .....                    | <b>56</b>  |
| SCHEDULE REPEATING EVENTS .....  | 56         |
| DATE CALCULATOR.....   | 60         |
| TRIGGERS.....  | 67         |
| CHAIN TEMPLATES .....  | 70         |
| EXERCISE 4.....  | 76         |
| <b>LESSON 5: AUTOENTRY FORMS</b> .....                                 | <b>78</b>  |
| CREATING AN AUTOENTRY FORM .....                                       | 78         |
| USING AN AUTOENTRY FORM.....   | 80         |
| ASSOCIATING AN AUTOENTRY FORM WITH A CLASSIFICATION CODE .....         | 81         |
| USING AN AUTOENTRY FORM WITH THE CLASSIFICATION CODE ASSOCIATION ..... | 83         |
| EXERCISE 5.....  | 84         |
| <b>LESSON 6: CUSTOM FIELDS</b> .....                                   | <b>86</b>  |
| CUSTOMIZING A USER FIELD .....   | 86         |
| EXERCISE 6.....  | 89         |
| <b>LESSON 7: FORM STYLES</b> .....                                     | <b>92</b>  |
| CREATING A FORM STYLE.....   | 92         |
| ASSIGNING A FORM STYLE TO MULTIPLE CLASSIFICATION CODES .....          | 103        |
| EXERCISE 7.....  | 104        |
| <b>LESSON 8: CUSTOM FORMS</b> .....                                    | <b>106</b> |
| CREATING A CUSTOM FORM TEMPLATE .....                                  | 106        |
| USING A CUSTOM FORM TEMPLATE .....                                     | 108        |
| USING THE DROP-DOWN CHOICE FIELD ON A CUSTOM FORM .....                | 111        |
| ACCESSING CUSTOM FORMS FROM A LIST .....                               | 112        |

|  |            |
|--|------------|
| EXERCISE 8.....  | 114        |
| <b>LESSON 9: DOCUMENT SEARCH &amp; INDEXING.....</b>           | <b>116</b> |
| PERFORMING A SEARCH.....                                       | 117        |
| SAVE A DOCUMENT SEARCH.....                                    | 119        |
| DOCUMENT INDEXING.....   | 121        |
| EXERCISE 9.....  | 129        |
| <b>LESSON 10: ARCHIVING RECORDS.....</b>                       | <b>132</b> |
| ARCHIVING A SINGLE RECORD.....                                 | 132        |
| RESTORING AN ARCHIVE RECORD TO THE ACTIVE RECORD LIST.....     | 136        |
| BATCH ARCHIVING.....   | 137        |
| PROCEDURE FOR ARCHIVING CLOSED CASES & ASSOCIATED RECORDS..... | 139        |
| EXERCISE 10.....   | 144        |
| <b>APPENDIX: DATABASE MAINTENANCE.....</b>                     | <b>146</b> |
| DAILY PROCEDURE – BACKUP DATABASE.....                         | 146        |
| MONTHLY PROCEDURE – RE-INDEX DATABASE.....                     | 150        |