

Table of Contents – Timeslips 2019/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	31
PURGING AUDIT TRAILS	32
DISABLING AUDIT TRAILS	33
EXERCISE 2	35
LESSON 3: DATA ENTRY ASSISTANT AND THE FIRM ASSISTANT	38
DATA ENTRY ASSISTANT	38
FIRM ASSISTANT	43
PRINTING FIRM ASSISTANT INFORMATION	45
EXERCISE 3	46
LESSON 4: HIDING DATA WITHIN THE DATABASE	48
HIDING AND REMOVING DATA	48
CLOSING SLIPS	48
INCLUDING CLOSED SLIPS ON REPORTS	52
REOPENING SLIPS	54
HIDING AND DELETING NAMES	55
CHANGING THE CLASSIFICATION FOR INDIVIDUAL NAMES	56
CHANGING CLASSIFICATION ON MULTIPLE NAMES	57
EXERCISE 4	59
LESSON 5: ARCHIVING, PURGING, AND COMBINING	62
ARCHIVING SLIPS	62
COMBINE - RESTORING ARCHIVES	63
INCLUDING TEMPORARY SLIPS ON REPORTS	65
REMOVING TEMPORARY SLIPS	66
PURGING DATA	66
EXERCISE 5	73
LESSON 6: CALENDAR	76
VIEWING THE CALENDAR	76
NAVIGATING THE CALENDAR SCREEN	77
ADDING A MEETING	78
SET MEETING RECURRENCE	80

ADDING A To Do	81
CHANGE CALENDAR SETTINGS	82
EXERCISE 6.....	83
LESSON 7: ALERTS	86
ALERTS.....	86
CREATING ALERTS	86
THE ALERT LIST DIALOG BOX	89
LESSON 8: CREATING CUSTOMIZED REPORTS	94
CUSTOMIZE AND SAVE A STANDARD REPORT	94
CREATE A USER-DEFINED REPORT.....	101
CUSTOMIZE EXISTING REPORTS	107
EXERCISE 8.....	116
LESSON 9: MAIL MERGE	120
CREATING A MAIL MERGE USING A DEFAULT TEMPLATE.....	120
CREATING A MERGE TEMPLATE	128
LESSON 10: IMPORTING AND EXPORTING BILL LAYOUTS	132
IMPORTING BILL LAYOUTS	132
EXPORTING BILL LAYOUTS.....	134
EXERCISE 10	136
LESSON 11: TIMESLIPS ADMINISTRATOR	138
TIMESLIPS ADMINISTRATOR.....	138
USING DIAGNOSE THIS COMPUTER	140
TIMESLIPS LICENSES AND LOGINS	142
EXERCISE 11	143
APPENDIX: BACKING UP YOUR DATABASE.....	146
DAILY PROCEDURE	146
MANUALLY BACKING UP YOUR DATA	148
SCHEDULED BACKUP OF YOUR DATA.....	152