



Eagle ITG

Eagle ITG
Training Series

Time Matters
Document
Automation
“Beyond Nuts &
Bolts”

PMAC 2009

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Document automation and management is a key part of any business today, law firms are no exception! Not only do you need to record the incoming documents in whatever form they are sent to you in, but you must also be able to generate documents quickly – thus increasing the productivity of the firm.

1 Document Automation

Document automation is the means to create new documents quickly with as little typing as possible. This can range from merge macros within your word processor to integration with Time Matters or HotDocs™ to create intelligent documents that can make decisions based on the data you have provided.

1.1 Formattable Clipboards

Formattable Clipboards are a very powerful feature of Time Matters that give you the ability to create “smart” documents that can be pasted into any application, including an email program.

More important than simply creating documents, Formattable Clipboards allow for automation within Time Matters as well and gives you the ability to create form emails with a single click!

Formattable Clipboards are just as the name implies, something that is copied to your clipboard, just like when you highlight something in any Windows program and press CTRL-C. This means that you won’t generate a document automatically, but rather paste your clipboard into whatever text area you want this “document” to appear.

One of the nice features of Formattable Clipboards is that you can access your saved list of clipboards from just about anywhere in Time Matters. Some good uses of Formattable Clipboards are:

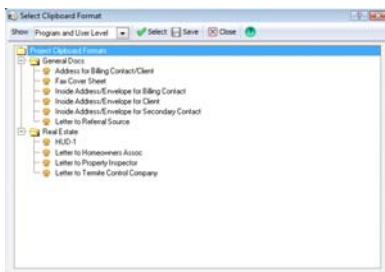
- Email form templates
- Templates to use in other Time Matters fields
- Copy and paste document generation for complex documents requiring logic or simple documents with very little formatting

TIP:

You can access Formattable Clipboards anywhere you see the following symbol:



Or if you are looking at a PowerView, you can press CTRL-C to pull up Formattable Clipboards for that type of record.



- Fax cover sheets
- Firm letterhead with no graphics or complex styles
- Short documents

1.2 Document Merge

Formattable Clipboards are nice for their ability to perform some automation in your documents, but sometimes you need to use existing templates or designs, and this is where Document Merge comes into play.

Document Merges are good for:

- Firm letterhead with graphics and complex styling
- Fax cover sheets with graphics and complex styling
- “Fill in the blank” document templates that simply need to show information from a single type of Time Matters record
- Engagement agreements that don’t vary from one to another
- Very long multi-page documents

1.3 HotDocs

When you need the best of both worlds, Formattable Clipboards and Merge Documents, you employ HotDocs.

HotDocs templates are good for:

- Anything that you would use Formattable Clipboards or Merge Documents for
- Complex document assembly where there are “If’s”, such as “If this is a personal injury matter, include a contingency paragraph”
- Documents that require a list of database records, such as a bankruptcy matter that requires that you list all creditors or assets that you have recorded in Time Matters
- Any document where you want to ask the person creating the document to answer questions and take action based on their answers

TIP:

No matter where you are in Time Matters, you can create a document instantly by pressing CTRL-SHIFT-D.

FEATURE:

Do you need to quickly replace gender language in your document based on the gender of your client? If you have a ‘Gender’ field in Time Matters, HotDocs can automatically replace all gender language based on the value of that field.

“[GENDER1] left shoulder was injured in the accident”

Gender Male

“His left shoulder was injured in the accident”

2 Document Management

While document automation allows you to create your documents, you still need a way to access those document easily and efficiently. Document management is providing a filing system of all your documents in a central location.

2.1 Saving Documents – TM Save

When you install Time Matters you will get functionality added to your most common programs, one of these features is the TM Save button added to your Microsoft, Corel and Adobe applications. The TM Save button saves what your are currently viewing to Time Matters – and it can be set up so that it essentially replaces your existing Save button in those programs, giving you the ability to automatically name and file this document as well as attach it to Time Matters in one click.

If you find yourself creating documents directly in Word or WordPerfect rather than starting in Time Matters, the TM Save button allows you to easily attach that document to Time Matters.

2.2 Saving Email Attachments

Like the TM Save button in other applications, Outlook gives you the TM Connect and Save Attachment buttons.

You can save your attachments directly to Time Matters with your email, but saving attachments not only can lead to database bloating (excessively large and unstable), but also doesn't make it easy to get to those documents later. Instead, it's better to save your attachments as separate document records within Time Matters.

Attachments do not get indexed for searching later, documents do, just another reason to save all your attachments as Time Matters documents!

2.3 Linking Any Document Without TM Save

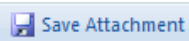
It's very likely you want to save documents or files to Time Matters but don't have a TM Save button to do that. Any file of any kind can be attached to Time Matters for easy access.

INTEGRATION:

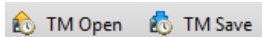
Microsoft Office:



Microsoft Outlook:

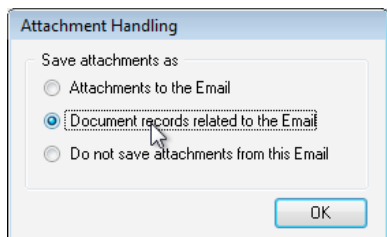


Adobe Acrobat:

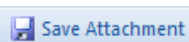


TIP:

Avoid potential database disasters when attaching emails to Time Matters by saving attachments as Document Records or separately as TM Save Attachments.



OR



You can always create a new document record and browse to the file you want to attach, or you can drag and drop them (see section 2.4).

2.4 Attaching Your Old Documents

So what about the thousands of documents you currently have on your hard drive that aren't in Time Matters because you did not generate them from Time Matters or TM Save them? There are easy methods to bring those documents into Time Matters!

Time Matters allows you to drag and drop documents and files onto the matter in the matter list to link those documents with Time Matters so you can bring all of your legacy data into your practice management system.

3 Setting Up Document Management

There are many options to having your Time Matters help manage your documents and files.

3.1 Auto File Saving & File Naming

This may be one of the most “wowing” features of Time Matters! So many firms have recurring document saving problems, like one of your staff saves the file to the wrong location or someone accidentally drags and drops a file (or worse, a folder) to a different location and nobody can find the documents.

The auto naming and saving feature allows you to define where and how you want documents saved so that you don't have to drill into a series of Windows folders to find the place where the document you are saving should be stored.

The first thing you should do is write down how you want to store your documents. Answer the following questions:

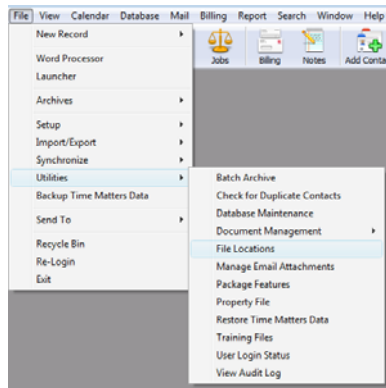
- What drive or server share should they be stored?
- Where should the “main” or root directory of all documents be located?
- What should the folders be named for each client or matter?
- How should they be named?

TIP:

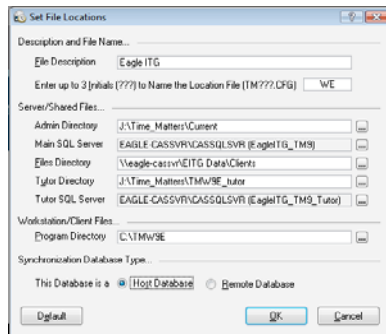
Once you get your auto naming set up, change Word or WordPerfect so that the save button is no longer visible, instead give them the TM Save button as their default

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Once you have answered these questions, you are ready to set up automatic naming. To start, go to the Time Matters utilizes and File Locations:



You will typically only have one configuration file, but if you have more than one, choose the configuration file for your firm and click the blue triangle icon to edit it:



TIP:

You can save some headaches in complex network environments by assigning your files directory to a UNC path instead of a hard coded drive letter.

G:\CLIENTS

Becomes

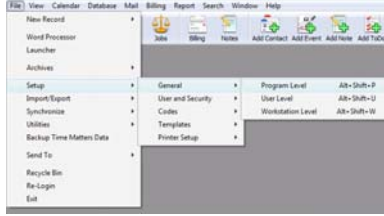
\\server\shares\clients

This way if a user has different drive mappings you will still all be looking to the same directory.

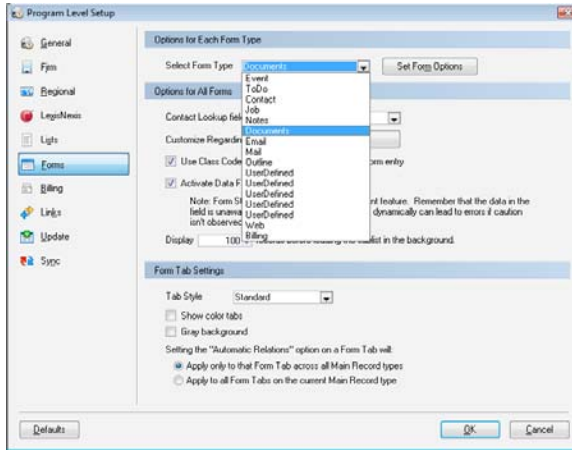
You want to edit the 'Files Directory' setting. You can either paste a path in this field or click the '...' button to browse to your location. This should be the ROOT location of your documents. This is the only part of this process that you will need to do on each workstation, as it will be the common location that all Time Matters users will share. If you have departments that store their documents in different locations, you can modify this for each computer to fit into their own document management profile. Once you have set the location click OK to save the changes, then close the file locations dialog.

Now you want to edit your program level settings:

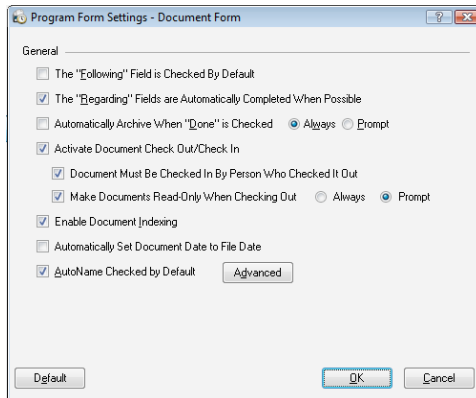
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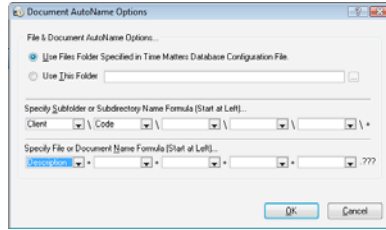
Now, select 'Forms' from the setup options, then 'Documents' as the form type and click 'Set Form Options':



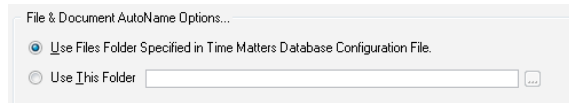
You will see the last item on your list is to AutoName your documents, check that option and click on 'Advanced' to set up AutoNaming:



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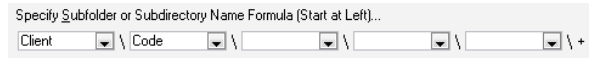


From here you have several options, let's talk about each of them. The first of these is the root file folder:



You should use the first option - that is why we went into the file locations and set up the root folder. You could choose the second option and “hard code” the location to your root folder, but the downside to this is that every person will have to always have the same drive letter for documents. If your network is predictable, you could set this to, say, “F:\CLIENTS” or if you want to configure each user to save to a different location, then you can do that here.

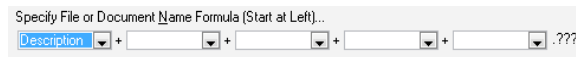
Next you have the directory structure:



This is where things start to get fun. In our example above, we have told Time Matters that when we save documents it should go to our root drive (we'll say 'F:\CLIENTS' for now), then under a folder named after our client and finally the code we gave our document. So it would look like:

F:\CLIENTS\Able, Barry\CORR

So we have the folder, we just need a name:



In this example, the description we provide in Time Matters will be our file name, so:

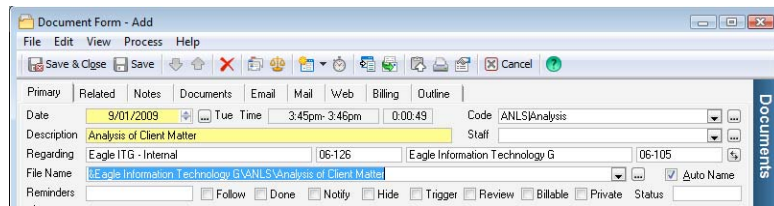
F:\CLIENTS\Able, Barry\CORR\Correspondence with Client.doc

To see this in Time Matters with AutoNaming turned on:

TIP:

You don't have to just use the auto naming fields that Time Matters has set up for you, use the “user” document fields to create an even more complex naming convention!

For example, let's say you want to keep your documents managed by practice area, Time Matters doesn't have an option in auto naming to say the first directory should be “Family Law” or “Civil Litigation”, so create a custom field in your matter that specifies the practice area and pass that to your document record in the user defined fields, then select USER1 from the auto naming fields to incorporate this into your path.



You'll see that the file name matches our setup. The one part that may be confusing is the '&' at the beginning of the file name, this means "whatever directory is in file locations plus what follows the &".

This is just an example; you can get quite elaborate with naming conventions and can use just about any field in the document record for naming your document. If you want to tack on a date, there is an option for that, hyphens and periods - there is an option. The only limit is really your imagination because once you incorporate the custom fields available to you just about any naming convention can be accommodated.

TIP:

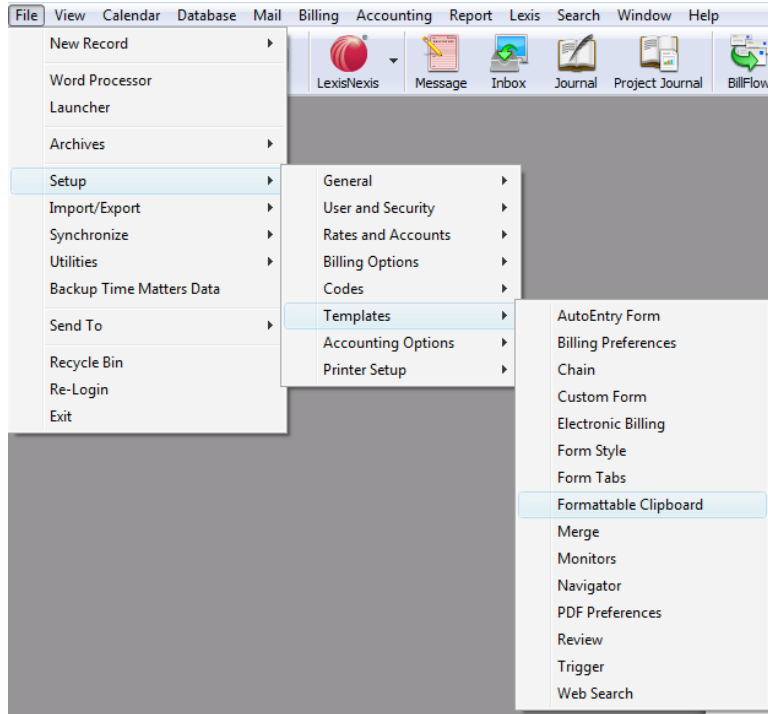
If you use the normal Windows key for copying to your clipboard, CTRL-C, in many of Time Matters screens, especially Powerviews, this will bring up your Formattable Clipboard list.

3.2 Creating a Formattable Clipboard

Formattable clipboards can be as simple as just static text that you want to repeat or it can be as complex as filling in the blanks of a document and including a paragraph based on the value of a database field.

Explaining how you can use Formattable Clipboards could take a whole book by itself, so let's just go over the broad strokes and ignite your imagination a bit. The first thing we need to do is create a Formattable Clipboard, this is done by going to the templates in Time Matters:

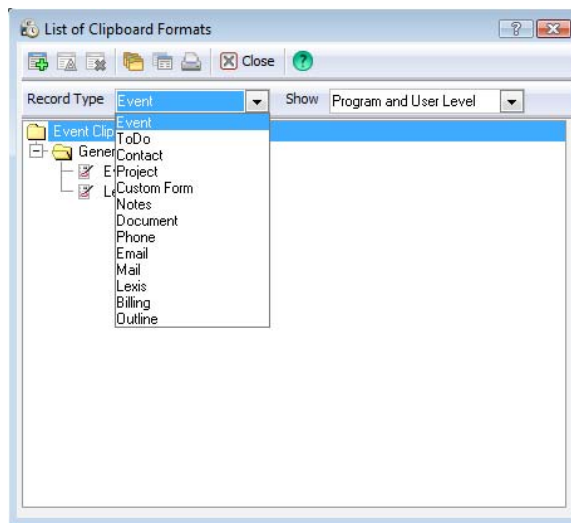
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Then select the type of clipboard you want to create:

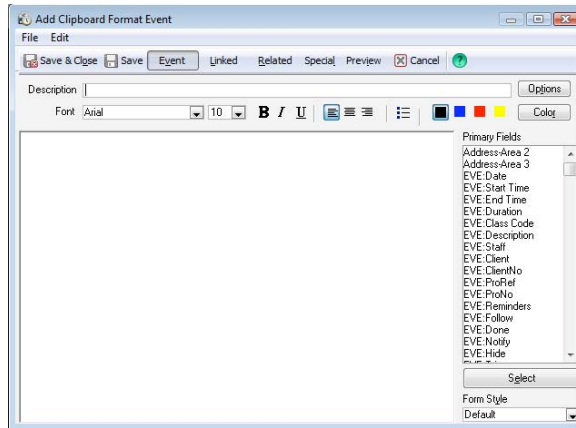
TIP:

Don't forget that you can set up USER or PROGRAM templates! If you don't want to have fancy code in your Formattable Clipboards to add a signature line you can simply give each user a USER level clipboard with their signature statically added.

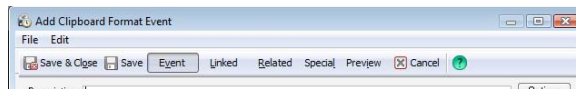


Then click the green plus button to create a new template and get to work:

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Before you dive in too much, let's talk about this screen for a moment and figure out what can be done:



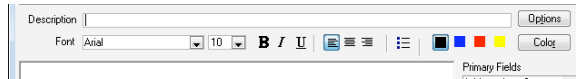
Outside the obvious saving buttons, you have a few options to choose from:

- **Event**
This is just showing us that I created an Event clipboard, so the fields I can choose from are event specific
- **Linked**
Inside of my events there are fields that are linked in Time Matters. An example of this is that the matter and client are linked via the regarding line, but if I created a link for, say, opposing party then their information would appear here as well
- **Related**
This is so I can include information from related records. On a matter, for instance, all of my to-do records for that matter are related to that matter, so I can access ALL of my to-do records from here.
- **Special**
These are special command you can use inside of your clipboard, such as today's date or the staff member who is creating the clipboard
- **Preview**
This allows you to see what this clipboard will look like in its final form.

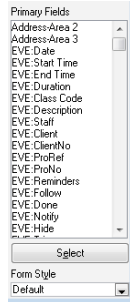
TIP:

Don't get caught up just creating plain "fill in the blanks" templates, use your imagination and really make use of the IF and SELECT special fields to really automate things.

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This area is the basic formatting for the clipboard. You won't have as much flexibility with clipboards as you do in your word processor, but enough options to do a lot of what you want to do.

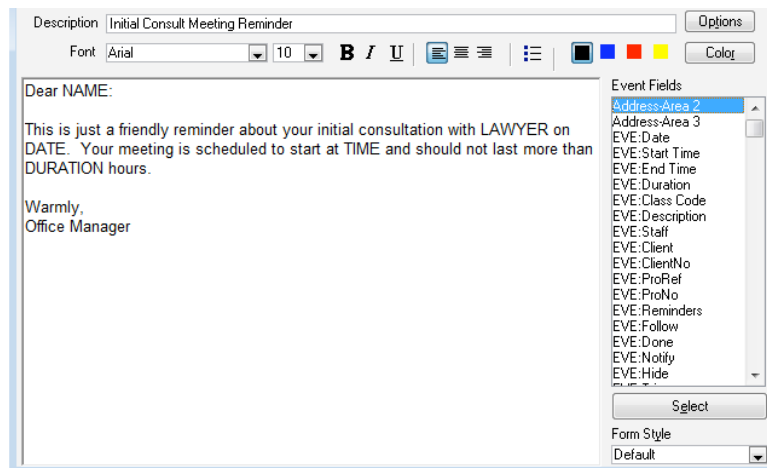


These are the fields you can choose from to include in your clipboard; they are specific to the type of clipboard you are creating. This area will also display the options for Linked, Related and Special as well.

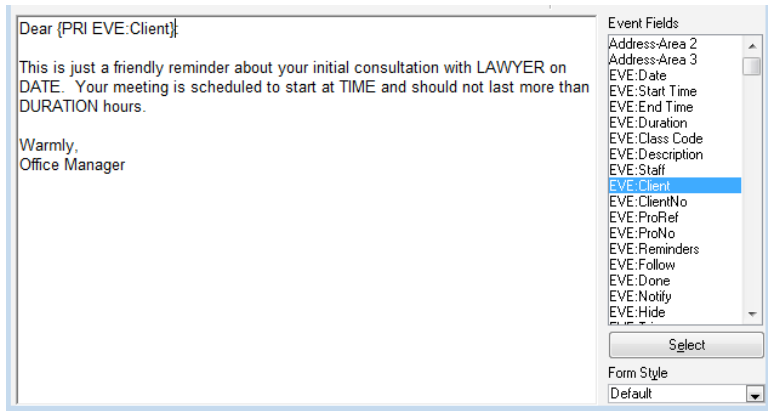
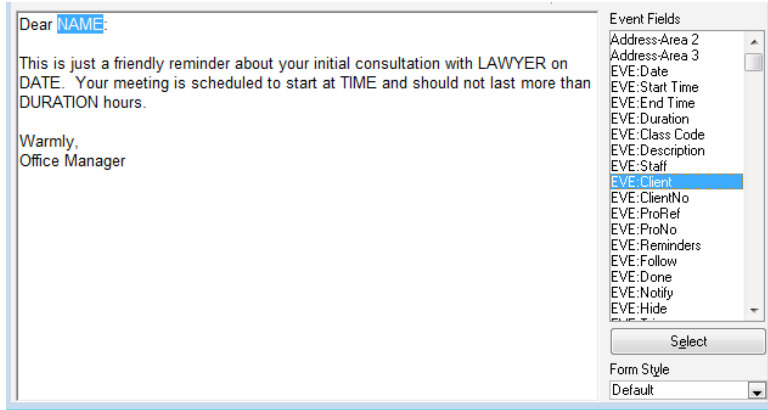
TIP:

Don't see your fields on the list? At the bottom of the field list is the form style from which these names are derived.

So, let's create a simple meeting reminder! The easiest way to do this is to just start typing just as you would if you were creating a new email or document for a client, except when you get to the variables (like name or date), you will select from the list instead. Sometimes it's easier to type the whole thing out and edit it afterwards:



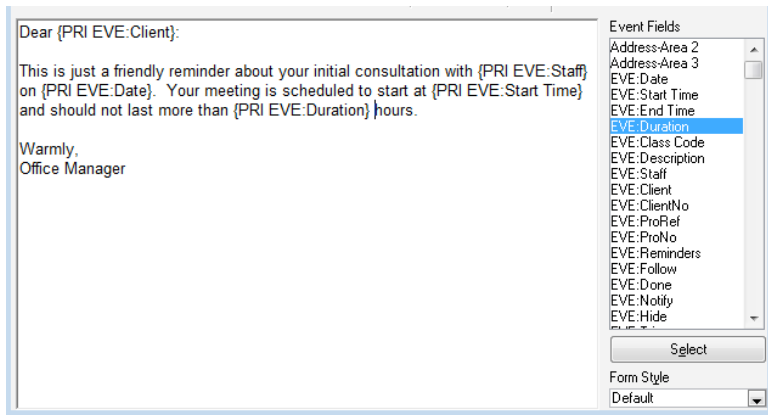
Notice that we used all capital letters to use as a placeholder while creating the document, now we'll fix that up. First you will double click the all placeholder, then find the matching field in the right hand box and double click that, you'll notice that our placeholder is replaced by the field we choose:



TIP:

Using field placeholders in your templates allows you to really visualize what the document is going to look like. Instead of spending a lot of time adding and removing fields, create your own naming convention so you can easily change 'NAME' to 'PRI EVE:CLIENT' once your document is the way you want it.

If we now do that for the rest of our clipboard:



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Now lets try this out. Create a new event record and click the Formattable Clipboard button and select this clipboard:



Event Form - Add
File Edit View Process Help
Save & Close Save Cancel
Primary \ Related
Date 9/01/2009 Tue Time 9:00am-10:30am 1.5 Code MEETMeeting
Description Initial Consultation Staff RSB/Robert S. Brown
Regarding Able Consulting Business Valuation 06-503.001 Barry B. Able 001
Reminders Follow Done Notify Hide Trigger Review Billable Private Status

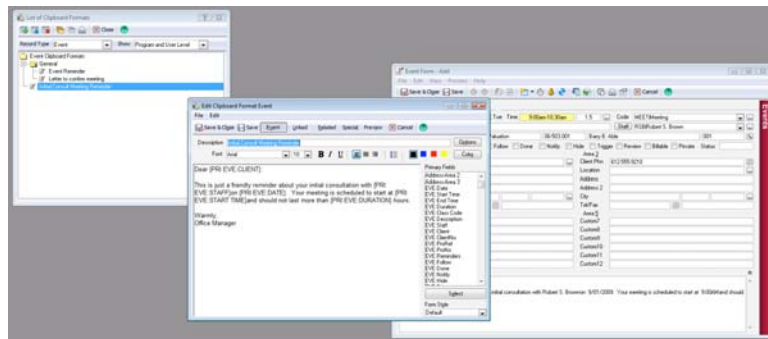
Then paste the clipboard in Word or notepad with CTRL-V or using the edit menu (when I'm testing I just paste it in the memo area of the form since it's right there).

Area 6
Dear Barry B. Able:
This is just a friendly reminder about your initial consultation with Robert S. Brown on 9/01/2009. Your meeting is scheduled to start at 9:00AM and should not last more than 1.50 hours.
Warmly,
Office Manager

It looks good but could use some editing. To make life easier, I'll just leave my event window open and edit the clipboard so I can switch between the two windows:

TIP:

When testing your Formattable Clipboards, a handy way to keep from having to constantly open and close Time Matters windows is to have all of your windows open at once. If you have an event record, for example, open BEFORE you work on your template then you can simply use that as your test window, if you do not open it first then you will have to save and close your template and create a new event each time you want to test your clipboard.



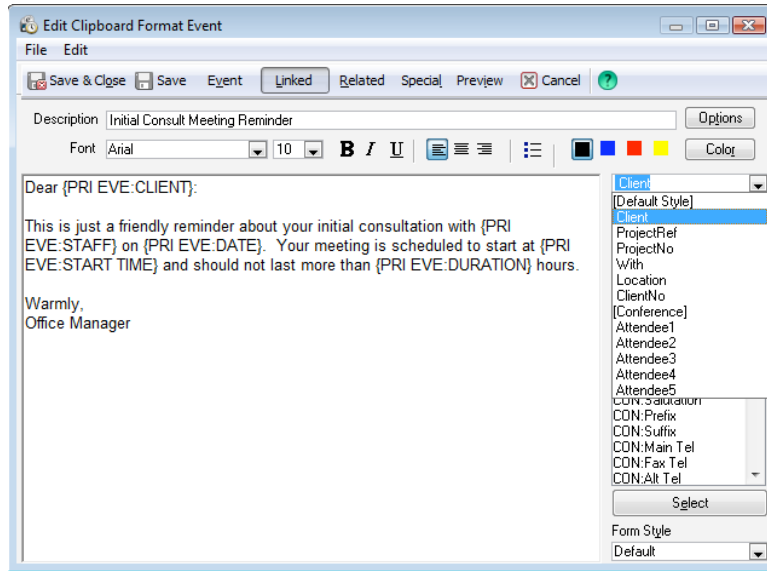
Now I can make my edits, save them and click on the event window to test them out. Here I have fixed the spacing and made it read better:

Area 6
Dear Barry B. Able:
This is just a friendly reminder about your initial consultation with Robert S. Brown on 9/01/2009. Your meeting is scheduled to start at 9:00AM and should not last more than 1.50 hours.
Warmly,
Office Manager

This looks better, but that name isn't really what I wanted. Here is where I'll use the Linked button to drill into my client record to get his first name:

Event Linked Related Special Preview

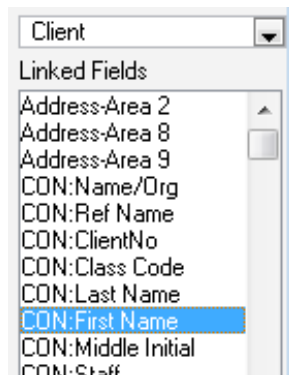
Select the linked client record:



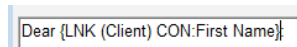
Highlight what I want to change:



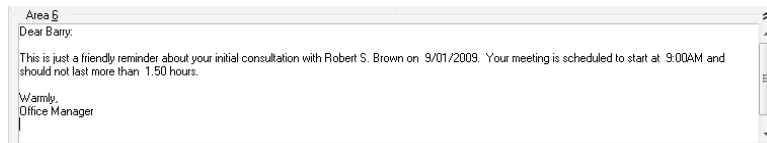
Find the client field I want to use:



Insert it into the clipboard:



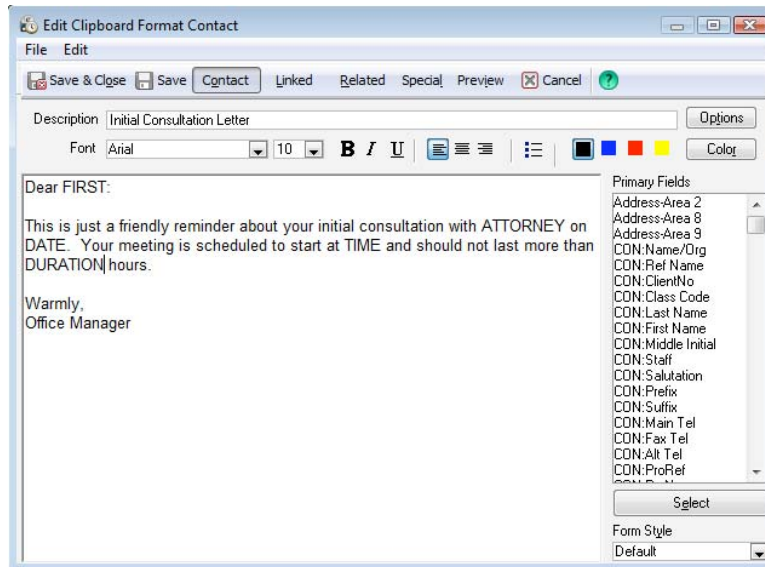
Now let's see how that looks after saving the clipboard and switching to my event window to test:



That's much better!

One of the more powerful features of Formattable Clipboards is the SELECT...END SELECT special function that allows us to find records based on criteria we specify. For this same clipboard we are going to create a contact clipboard instead of an event clipboard and find the event record automatically.

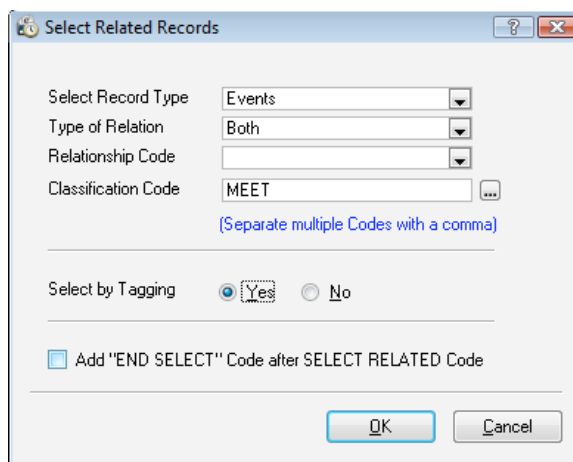
You start with the same basic setup:



TIP:

Some Formattable Clipboard fields will look right when you add them to your template but will have too many spaces when you actually create the document. For example, DURATION will have an extra leading space, so even though it may look wrong, make sure there are no spaces in front of these fields since Time Matters will add one anyway.

Now put your cursor just below the 'Dear FIRST' field and click the Special button and double click on the 'Select' option. After changing our criteria our Select form looks like this:



To break this down:

- Because we want to look up our initial consultation, we select Event as the type of record we are selecting

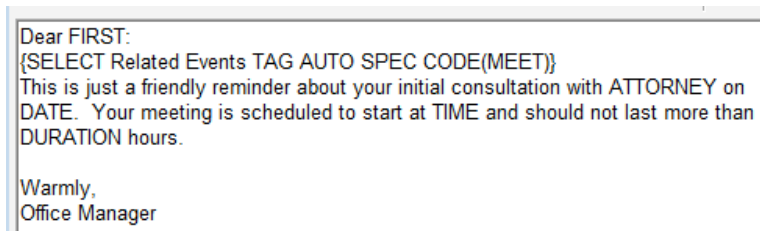
- Relation can be your automatic relations, specified relations or both
- The relation code can be specified if you need to
- The classification code is what we are searching for when we use this template. Many times you will find it helpful to create custom codes for items that you are creating Formattable Clipboards with Select for. In our case we are using the built in MEET code, which may result it multiple found events but we'll be able to choose the right event when we create the clipboard
- Because we are using a code that could be used for a number of things we select the 'Select by Tagging' option, otherwise Time Matters will assume it's the first MEET code found
- Since we typed our letter our first, we don't want to add an End Select. However, when you start getting good at clipboards you will find that you use that to save yourself a click later on. This is also helpful if you want to nest several Selects together (yes you can do this!)

TIP:

Creating codes for automation helps you to achieve what you want easily, but too many codes can be confusing. If you will never use a code for anything but what is created automatically, use special characters to separate those codes from the regularly used codes.

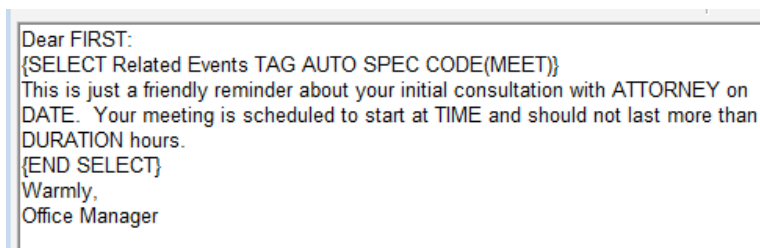
For instance, a meeting may be coded as MEET, but you may automatically create a follow up record, one that a user never creates manually. Try coding those records as '~FOL', the ~ in the front of that code will mean it displays last on the list and won't confuse users.

After we define our criteria, we see this:



```
Dear FIRST:  
{SELECT Related Events TAG AUTO SPEC CODE(MEET)}  
This is just a friendly reminder about your initial consultation with ATTORNEY on  
DATE. Your meeting is scheduled to start at TIME and should not last more than  
DURATION hours.  
  
Warmly,  
Office Manager
```

Now put your cursor before 'Warmly' and choose the End Select from the Special list:



```
Dear FIRST:  
{SELECT Related Events TAG AUTO SPEC CODE(MEET)}  
This is just a friendly reminder about your initial consultation with ATTORNEY on  
DATE. Your meeting is scheduled to start at TIME and should not last more than  
DURATION hours.  
{END SELECT}  
Warmly,  
Office Manager
```

What have we done? We have told this clipboard that everything between the Select and End Select will be derived from whichever record was selected – in our case any event with MEET as the code. The only thing

left to do is map our fields inside the Select code. To do this, you click on the Related button, select event and choose the fields:

TIP:

You can nest statements within statements. You can have a SELECT statement in your clipboard and before hitting the END SELECT have more SELECT statements. The same rings true for IF statements. This gives you a lot of flexibility in creating automated documents and allows you to really zoom in on the data you want to include.

Be careful though, nesting statements can read very confusing, so lay it out in a way that is readable and understandable before you finalize your document.

If you have complex nested clipboards, you might want to create a something that documents how you did it so the next poor person that has to edit it doesn't have a heart attack!

```
Dear {PRI CON:First Name}:
{SELECT Related Events TAG AUTO SPEC CODE(MEET)}
This is just a friendly reminder about your initial consultation with {REL EVE:Staff}
on {REL EVE:Date}. Your meeting is scheduled to start at {REL EVE:Start Time}
and should not last more than {REL EVE:Duration} hours.
{END SELECT}
Warmly,
Office Manager
```

Notice that we still used our Contact button to select the contacts first name, but everything in the select says 'REL', meaning it's a related record found by the select. We'll use this later in the session so you can see how it works.

There is so much more you can do with Formattable Clipboards, let your imagination run wild and you can probably find some ways to communicate automatically that will save you lots of time.

3.3 Creating a Merge Document

Creating a merge document is very simple. Just like Formattable Clipboards, you put placeholders in your document and tell Time Matters what to put there. Unlike Formattable Clipboards, you cannot drill into your related or linked records, but you can still do a lot.

The simplest way to start a merge document is to first create the document in your word processor and use placeholders for the variable information you want to include:

CLIENT ADDRESS AREA

Dear FIRST,

Thank you for engaging Brown, Campos & Marshall! Our meeting on DATE was very productive and we're certain that your MATTER will be settled quickly and equitably. If you have any questions, please don't hesitate to contact us.

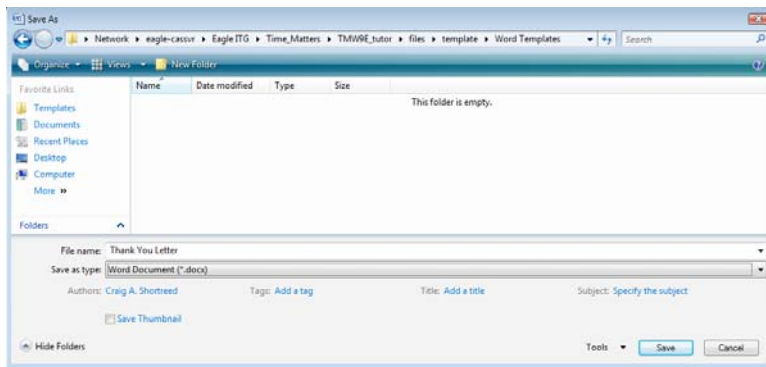
Warmly,

Robert S. Brown
Managing Partner

Now, save the document – but you want to save it to a special ‘template’ area so you know that it is a template. Since all of your users are mapped to the same file location (remember AutoNaming?), this is a great place to store your templates. There is already a folder there named ‘template’ where your PowerViews and icons are stored, create a new folder structure for your templates:

| | | | |
|-----------------|----------------------|-----------------------|----------|
| merge documents | 9/14/2008 10:14 AM | File Folder | |
| navigator | 4/24/2009 11:51 AM | File Folder | |
| powerview | 9/14/2008 10:14 AM | File Folder | |
| template.rar | 11/19/2006 10:35 ... | WinRAR archive | 1,545 KB |
| tmbank.doc | 10/30/2006 12:32 ... | Microsoft Office ... | 4 KB |
| tmbank.obd | 10/30/2006 12:32 ... | OBD File | 5 KB |
| tmbank.wpd | 10/30/2006 12:32 ... | WPD File | 1 KB |
| tmbank.xls | 10/30/2006 12:32 ... | Microsoft Office E... | 6 KB |

| | | | |
|----------------|-------------------|-------------|--|
| powerview | 9/13/2008 3:15 PM | File Folder | |
| Word Templates | 9/1/2009 4:37 PM | File Folder | |



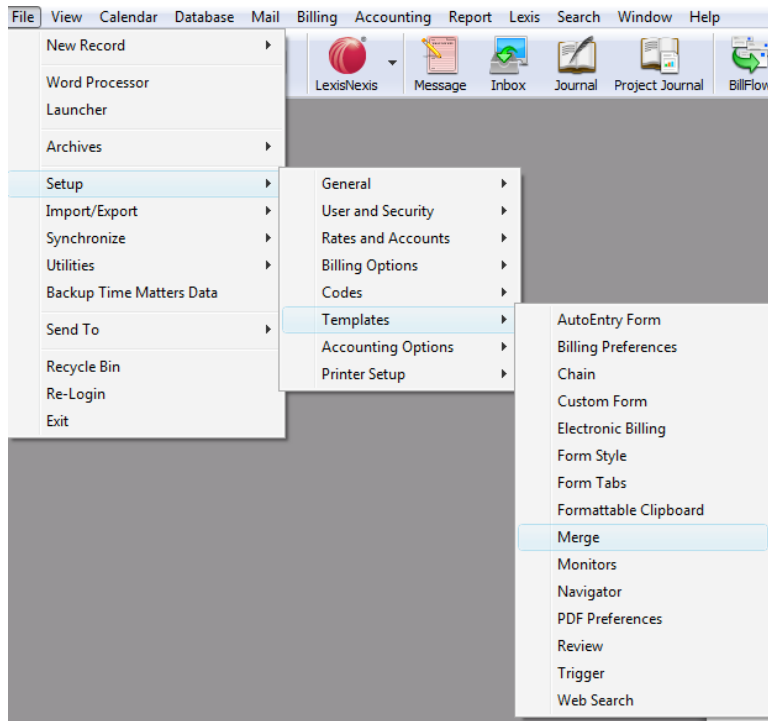
TIP:

Keeping your templates organized in the same directory as your files (from File Locations) makes it very easy for everyone to manage the templates and find them when needed. It also ensures that everyone has rights to read those templates when they want to generate them since they are in the same folder with the same security as your other documents.

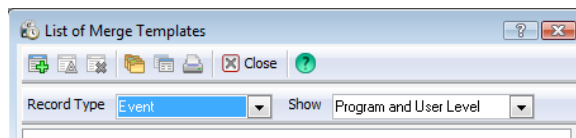
Try not to lump all of your documents in a single folder, it will be very confusing when you need to edit them or replace them. Make liberal use of folders and subfolders to organize your document templates, you will thank yourself later!

Now that we have saved our template, we can close it in our word processor and set it up in Time Matters. To start, go to the Time Matters templates and create a new merge template for the type of document you want to create (the process here is similar to Formattable Clipboards):

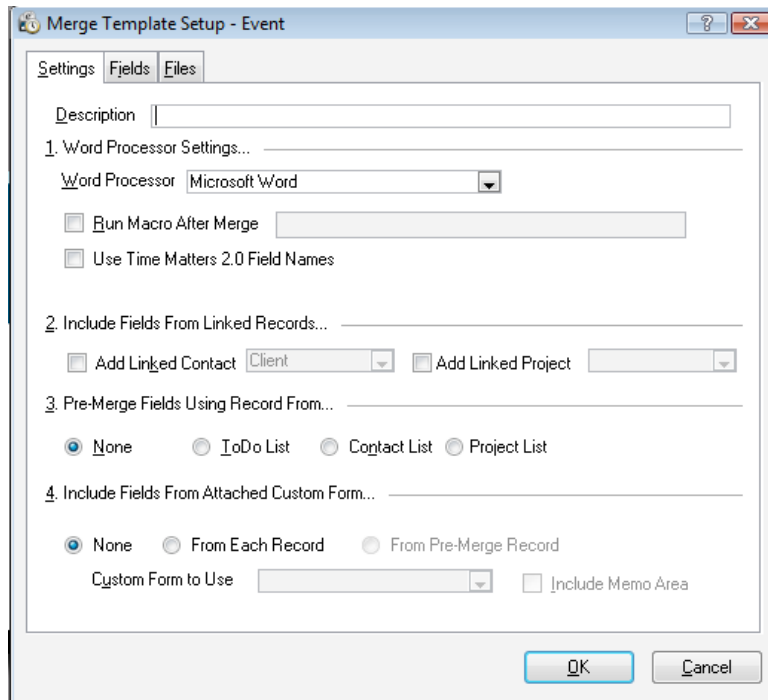
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Select the template type:



Create a new template with the green plus button:



Starting with the first tab that opens, the Settings tab has a lot of seemingly confusing fields, but they are not confusing at all:

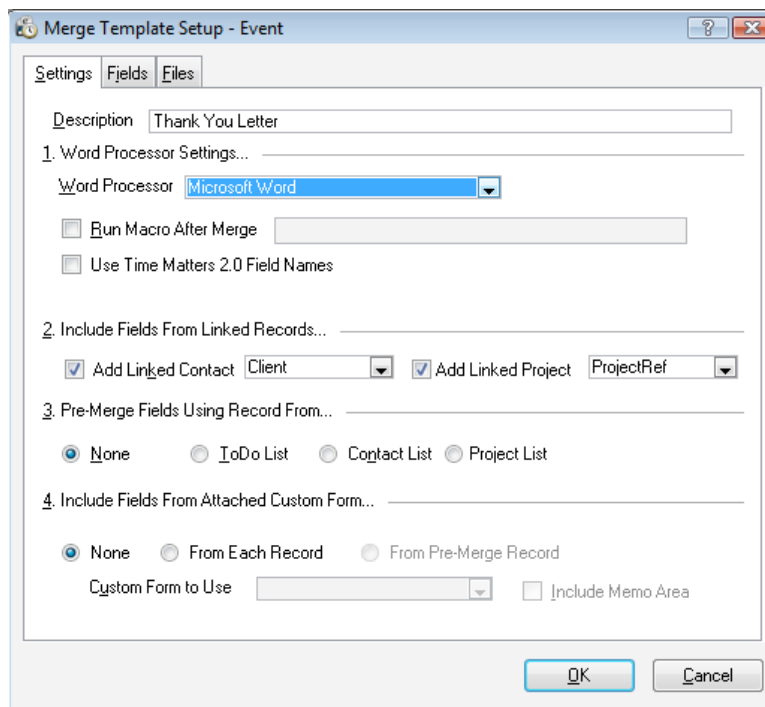
TIP:

Try using Formattable Clipboards and Merge Templates together. If you need the power of the Formattable Clipboard but the formatting of a merge document, you can create a macro in your word processor to automatically paste the clipboard to a particular location, then you just need to specify on the Merge Template to run the macro after the merge.

- **Description**
How you want this to appear on the list when you create a new merge document.
- **Word Processor**
Your word processor, in this case Microsoft Word is my chosen program
- **Run Macro After Merge**
If you have Word or WordPerfect macros that you use and you want them to fire after creating this new document, you can specify the name here. Some firms include disclaimers or signature lines as an example
- **Use Time Matters 2.0 Field Names**
If you had Time Matters 2.0 templates and you need compatibility, check this option – but you will be much better off migrating your 10 year old templates by now!
- **Include Fields From Linked Records**
In our case we are creating an event document, but we probably need to get our address information from the client, so we would check this box and select client, then check the matter box as

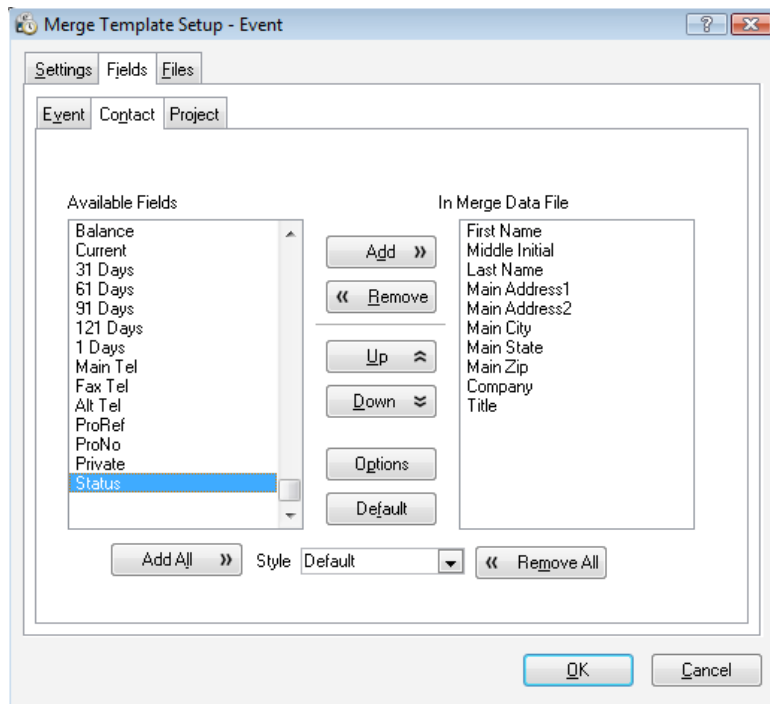
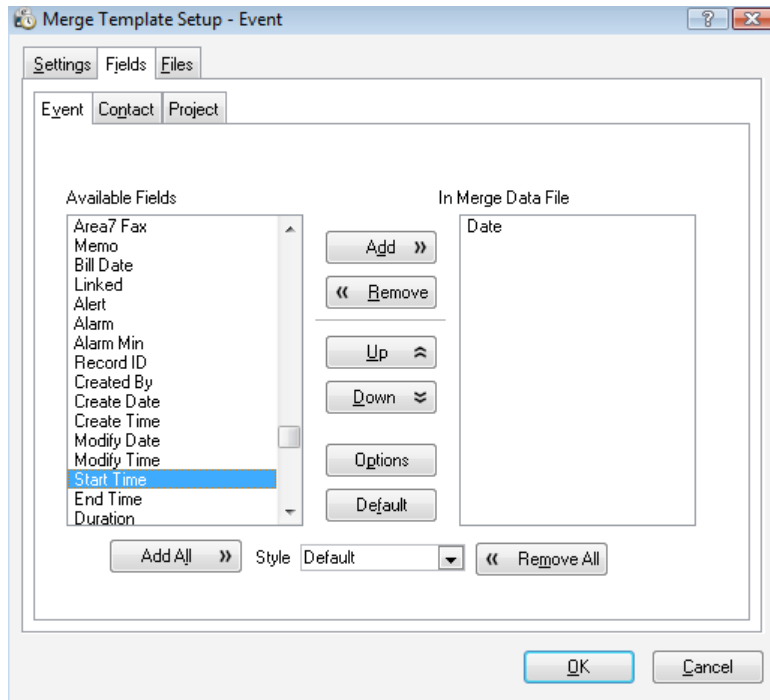
well so we have access to everything in our matter and client from the merge template

- Pre-Merge Fields Using Records From
This is typically used when you might need to write this letter to multiple contacts. In our example we are only writing a letter to the person we met with so we have no need to pre-merge additional contacts, matters or to-do records
- Include Fields From Custom Form
If you are using custom forms to record information in Time Matters, you can select the custom form type and merge those fields as well

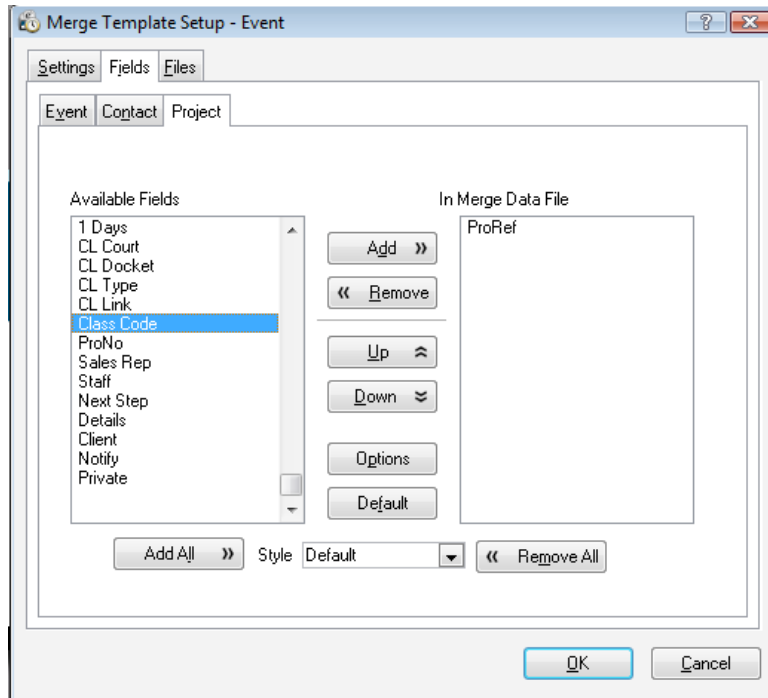


The fields tab. Now that you have defined what this merge should look like, you need to select which fields will be passed to your word processor for this document. In our example we need the client's address, their name, the matter we met about and the information about the initial consultation:

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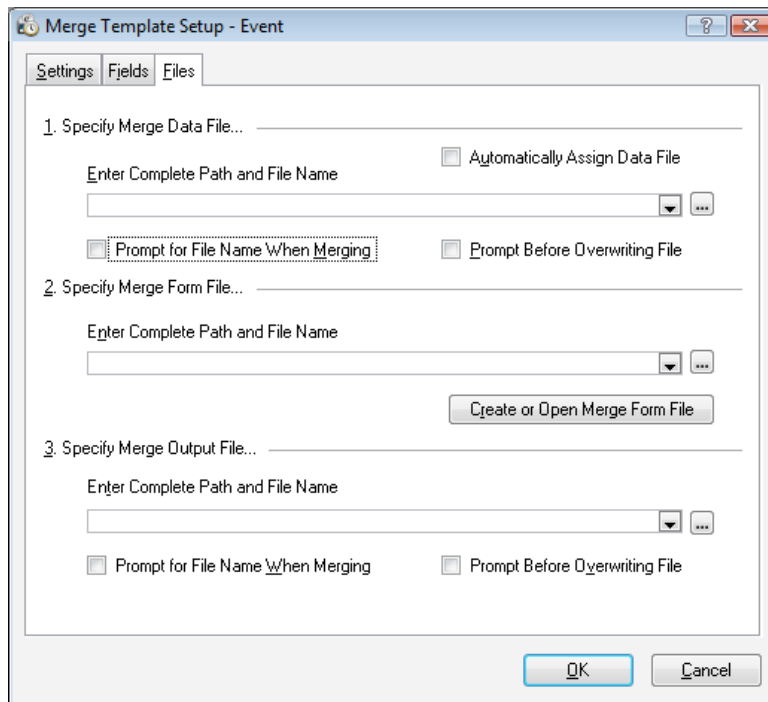
Eagle ITG Training Series – Time Matters Document Automation



Now that we have selected the fields, we just need to point Time Matters to our template on the Files tab:

TIP:

Before you click the button to 'Create or Open Merge From File', save this template first! Especially in later versions of Word, your virus software or anti-spyware software may cause Time Matters to crash when you try to run this template before saving it – then you have to start all over. The extra two seconds you spend doing this first will save you a lot of headaches later!



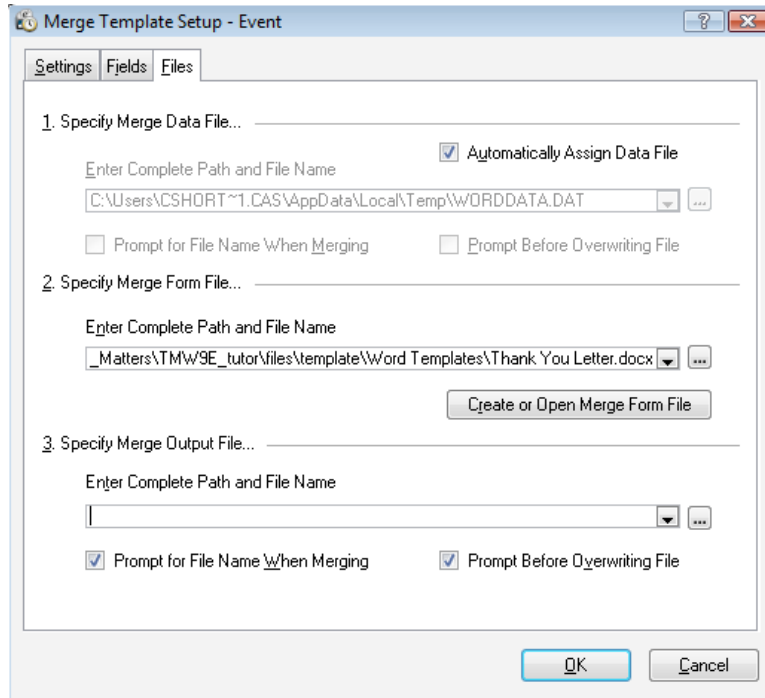
Let's look at the things to fill in:

- **Automatically Assign Data File**
This is normally going to be checked, and we are using this for our example. The only time you might want to not have Time Matters create your data file is if you have a special location that your I.T. department has set aside for merging documents or if you don't have the proper rights on your own computer to create merge files. This is also used if you want to save the merge data for use again later or in another program
- **Prompt For File Name When Merging**
If you specified a data file in the first field then Time Matters will prompt you for a name if this is checked
- **Prompt Before Overwriting**
Again, only if the first option is checked will this be used to notify you if you are about to overwrite your merge file
- **Enter Complete Path and File Name**
Here you will browse to the file you created earlier in your word processor. This is the template you are going to use to merge documents.
- **Enter Complete Path and File Name**
You will only supply this if you intend to write the same file repeatedly. Normally you don't use this field unless you don't want a unique file for each document generated with this template. For our example (and 99% of all merge templates we create) this is left blank.
- **Prompt for File Name When Merging**
Normally you will check this box. Time Matters will generate the file name for you if you have enabled AutoNaming, but if you have not then you will not check this box so Time Matters can ask you to specify where to save this document and what to name it
- **Prompt Before Overwriting File**
Again, most of the time you will want to check this box – you don't want to overwrite a document already on your hard drive automatically, have Time Matters warn you first!

TIP:

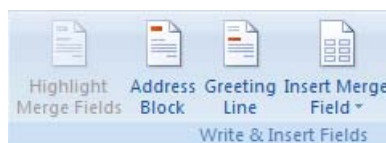
If you keep your merge templates in the same directory as your files (File Locations) then Time Matters will assign the '&' symbol for your documents, ensuring that all your users will find it according to their File Locations setup. Otherwise you may end up mapping them to a static drive letter or path that other users don't have, and when they try to create the merge document they will get an error.

Our options are now set:

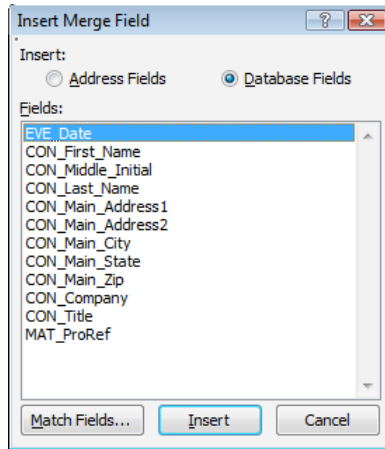


The only thing left to do is to replace our placeholders with actual Time Matters fields. To do this you can always edit the template from this screen by clicking on the 'Create or Open Merge Form File' button. Instead of creating the document ahead of time, you could have created it on the fly here but we've found it's much easier having your template ready to go ahead of time. We recommend you click OK here to save your merge template as some word processors will error the first time opened by a new merge template and you don't want to lose your changes. After you save it, just open again and click on the 'Create or Open Merge Form File' button.

When you click this button your word processor will open and allow you to insert fields. Every version of every word processor is a bit different but have the same theme, find the button that allows you to add fields:



And when you click it you are presented with the fields you chose in the merge template:



Just like in Formattable Clipboards, highlight each placeholder and replace that with a field from the field chooser:

```
«CON_First_Name» «CON_Last_Name»  
«CON_Company»  
«CON_Title»  
«CON_Main_Address1»  
«CON_Main_Address2»  
«CON_Main_City», «CON_Main_State» «CON_Main_Zip»  
  
Dear «CON_First_Name»,  
  
Thank you for engaging Brown, Campos & Marshal! Our meeting on «EVE_Date» was very productive  
and we're certain that your «MAT_ProRef» will be settled quickly and equitably. If you have any  
questions, please don't hesitate to contact us.  
  
Warmly,  
  
Robert S. Brown  
Managing Partner
```

Now save your document and you are ready to merge!

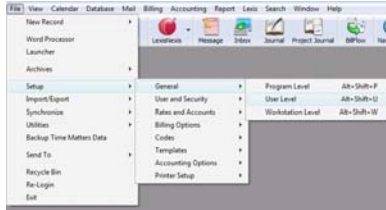
3.4 Creating a HotDocs Document

First and foremost, each workstation that wants to utilize HotDocs must have HotDocs installed and Time Matters configured. Each user must have their user preferences configured to allow HotDocs.

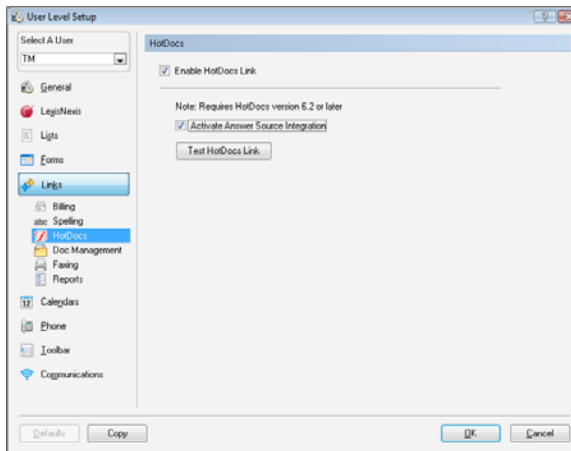
Before showing you how to link to HotDocs, the actual template creation itself is outside the scope of this seminar, we will be working with a sample template in HotDocs for our example. Our goal is to show you how to link to HotDocs, not create the templates themselves.

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To tell Time Matters that you have HotDocs installed, go into user level setup:



Select Links on the menu and then select HotDocs and enable it:

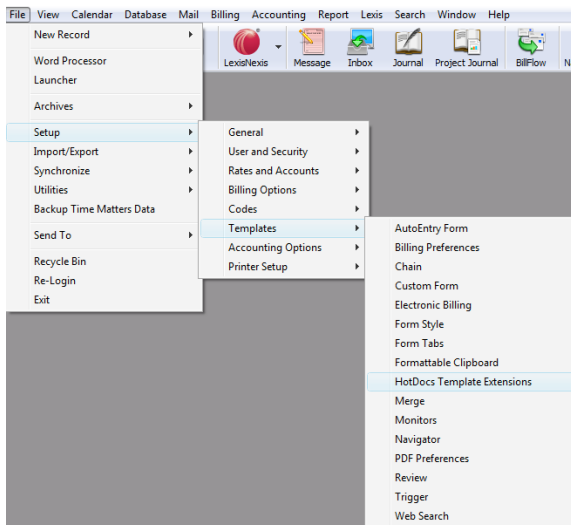


TIP:

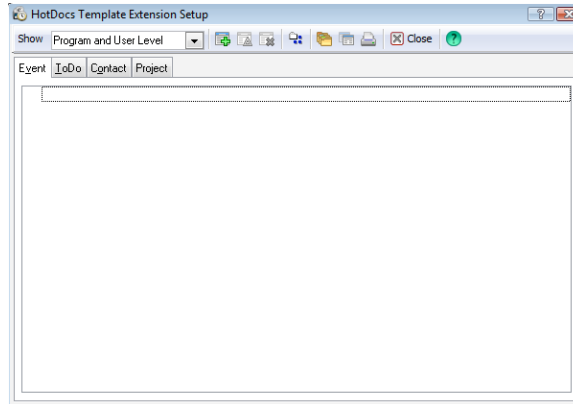
Really analyze your HotDocs documents and try to incorporate as many HotDocs fields into your customization as possible to cut down on how many questions are posted in the HotDocs interview. If you need to specify gender in your document then you might want a gender field in your contact or matter customization. Every click you save improves productivity and gets you to the end result faster.

Notice that we also checked to integrate answer sources, this way we can re-use our HotDocs answer files later.

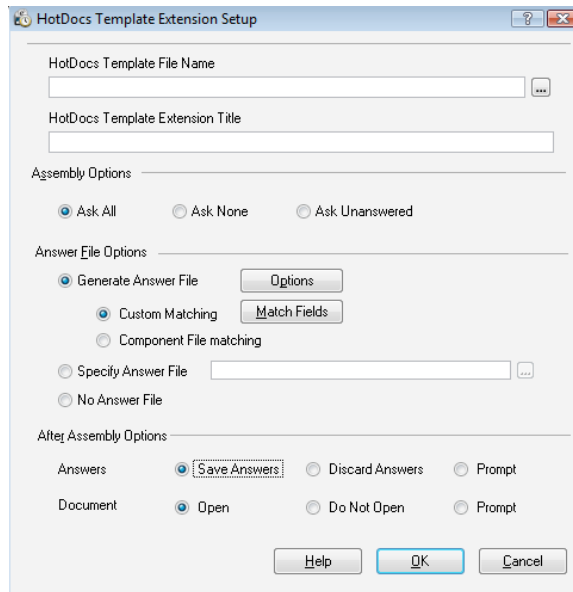
To create a HotDocs template in Time Matters, go into the template setup and select HotDocs:



Like other document automation methods, you will need to select a type of document you want to create – however, you can only create documents for events, to-do records, contacts and matters:



When you click the green plus icon to create a new document, you are presented with this screen:



Let's analyze the setup of a HotDocs template:

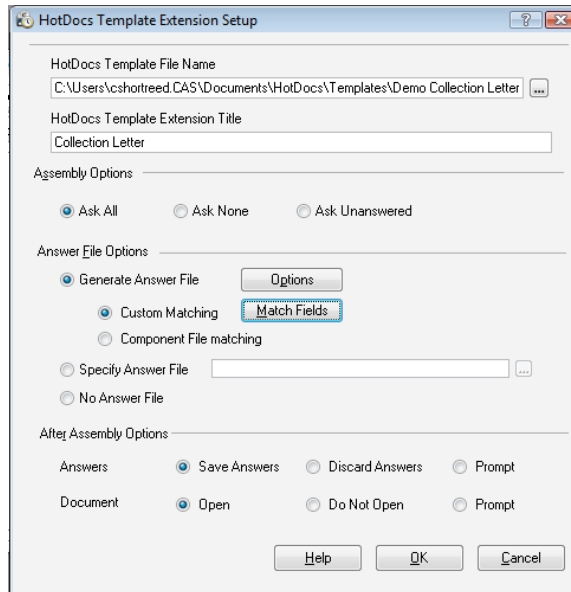
- HotDocs Template File Name
This is an existing HotDocs template that you have already created that you want to pass Time Matters fields to
- HotDocs template Extension Title
By default this will be entered for you when you select your template in the first field, but you can

change this to be whatever you want to appear on your template list

- Ask All / Ask None / Ask Unanswered
Select which option you want when the interview is run. If you supply everything from Time Matters you may only need to select 'Ask Unanswered' to make this automated.
- Generate Answer File / Specify / No Answer
If you want to create an answer file you can specify here. You can also select the Options button to change the behavior of your answer file, like how this should associate with Time Matters, date formatting and coding. You can also specify an answer file that you have already created (perhaps as a template) or no answer file to make this a one-off document that you won't need to modify or use the answers to in the future.
- Custom Matching / Component Matching
Typically you will want to map your fields using the Match Fields button, but if your field names match your component file names you don't need to – instead select Component File Matching
- After Assembly Options
You can specify if you wish to save your answers or not as well as if you want to open the document when it has been generated.

For our sample collection letter, we use the following defaults (the collection letter is a default letter that comes with HotDocs as a sample letter and should be available in your HotDocs if you want to use it):

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HotDocs Template Extension Setup

HotDocs Template File Name
 C:\Users\cshortreed.CAS\Documents\HotDocs\Templates\Demo Collection Letter ...

HotDocs Template Extension Title
 Collection Letter

Assembly Options

Ask All Ask None Ask Unanswered

Answer File Options

Generate Answer File Options

Custom Matching Match Fields

Component File matching

Specify Answer File ...

No Answer File

After Assembly Options

Answers Save Answers Discard Answers Prompt

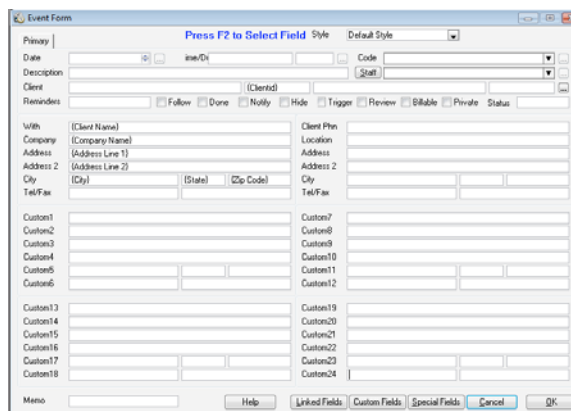
Document Open Do Not Open Prompt

Help OK Cancel

Because we want to automate our letter to the greatest extent possible, we will match fields by clicking on the Match Fields button. You are presented with a copy of the type of record you're creating this template for and matching fields is as simple as double clicking the Time Matters field and selecting the HotDocs component that will be updated from this field:

TIP:

Depending on how you set up your customization, it may be handy to have a screen print of the custom forms that you are pulling your HotDocs fields from. If you notice that the HotDocs mapping window shows generic names and the form style button doesn't get you what you want, then you can refer to your screen capture to map the fields properly.



Event Form

Press F2 to Select Field Style Default Style

Priority |

Date [Date] [Time/DT] Code [Code]

Description [Description] (ClientID) [State]

Client [Client] [Follow] [Done] [Notify] [Hide] [Trigger] [Review] [Billable] [Private] Status

Reminders

With (Client Name) Client Phn

Company (Company Name) Location

Address (Address Line 1) Address

Address 2 (Address Line 2) Address 2

City (City) (State) (Zip Code) City TEL/Fax

Custom1 Custom7

Custom2 Custom8

Custom3 Custom9

Custom4 Custom10

Custom5 Custom11

Custom6 Custom12

Custom13 Custom19

Custom14 Custom20

Custom15 Custom21

Custom16 Custom22

Custom17 Custom23

Custom18 Custom24

Memo [Memo]

Help Linked Fields Custom Fields Special Fields Cancel OK

At the bottom of this form you have some additional options for linking records, let's review them. First is the Linked Fields button:

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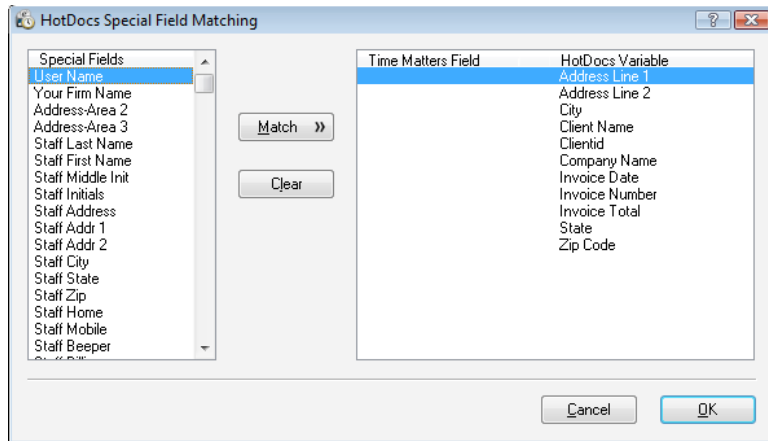
Like the Formattable Clipboards, you can pass any linked record down to your HotDocs document. When you click the Linked Fields button and select which link you want to use, you are presented with a form just like the form you are currently looking at, allowing you to double click any field and map it to a HotDocs component.

The Custom Fields button allows you to map fields from your custom forms to a HotDocs template:

To use this you simply select the custom form style at the 'Form Code/Description' box and match fields in the left column to HotDocs fields in the right column.

The Special Fields button gives you fields that don't appear in any of your records but are handy to pass to

HotDocs. Like the Custom Fields button, you match fields in the left column with HotDocs fields in the right column:



For our document, we need only map the fields in our event record and save our template – it’s now ready for use.

4 A Day In The Life

Up to this point you have learned how to generate documents, save them and even drag old documents into Time Matters. Now let’s take some real life examples of how you can utilize this in your daily practice.

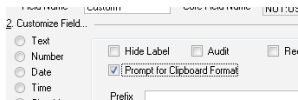
4.1 Scenario #1: Emailing A Meeting Reminder

We need to be able to send an email to our client when we schedule their initial consultation. We’ll use the event reminder we created earlier and an event form that has a custom field for the email address (with the Formattable Clipboard option checked).

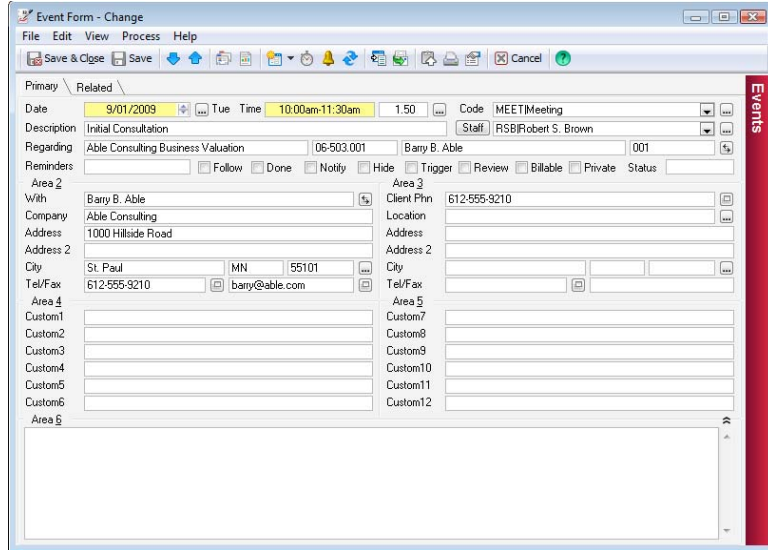
First we create our initial consultation record then save the record. Note that you aren’t going to save and close the record, just save it so that the new event is committed to the database:

TIP:

If you want one-click automation to create form emails, be sure that your email field has the Formattable Clipboards option checked:



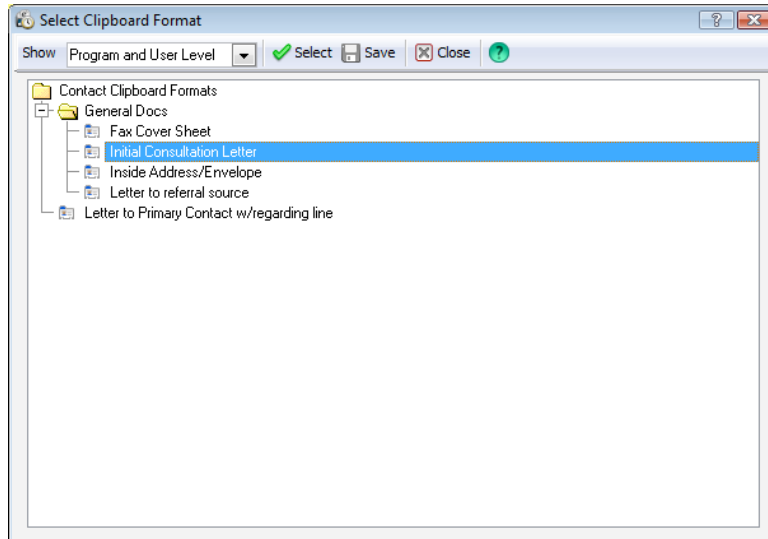
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You will notice that our form has an email address with our contact information, we'll use the button next to this address to send a form email:



When we click the button we get our list of Formattable Clipboards to choose from (we can also cancel this window to not use any clipboard at all):



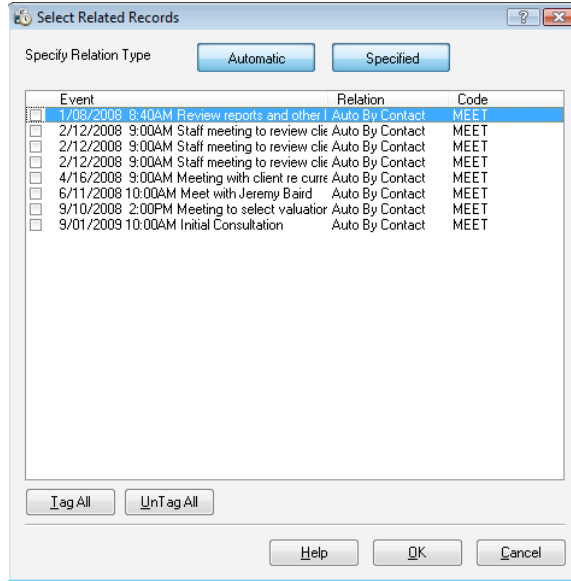
When we select this we not only create our email but save a click because Time Matters will automatically run the Formattable Clipboard (and it's associated Select) automatically. But, because we used a generic code of 'MEET' in our select, we are asked to choose which event to use (we could have prevented this if we set up a new code for this, perhaps INIT):

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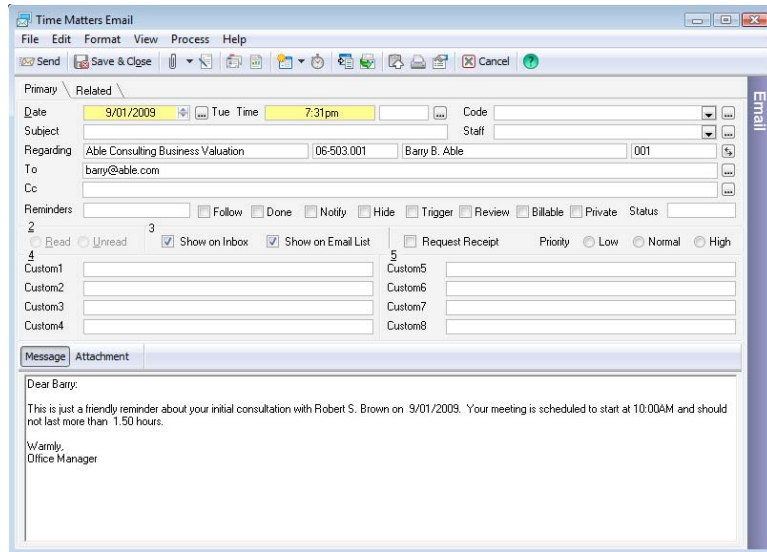
TIP:

Use unique codes to limit the list that may appear when you use **SELECT** and **END SELECT** in Formattable Clipboards. To make things even easier add **IF** statements inside your **SELECT** statements to limit the results by a field value.

For instance, in our example we have many meetings, we could have added an **IF** statement to only show those that are in the future.



We could tag multiple meetings (need to list all to-do's or events for someone?), but we only want our initial consultation, so we select that and click OK:



Viola! Form email from within Time Matters.

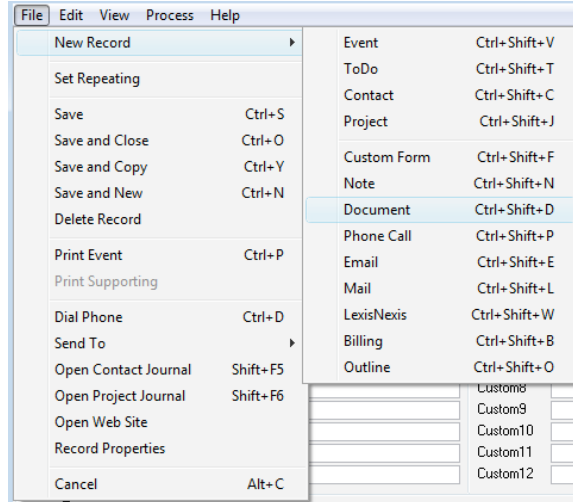
4.2 Scenario #2: Creating A Thank You Letter

We met with our client today and would like to send a thank you letter to them. Because this is an event letter that we defined, we open the event and create a new document:

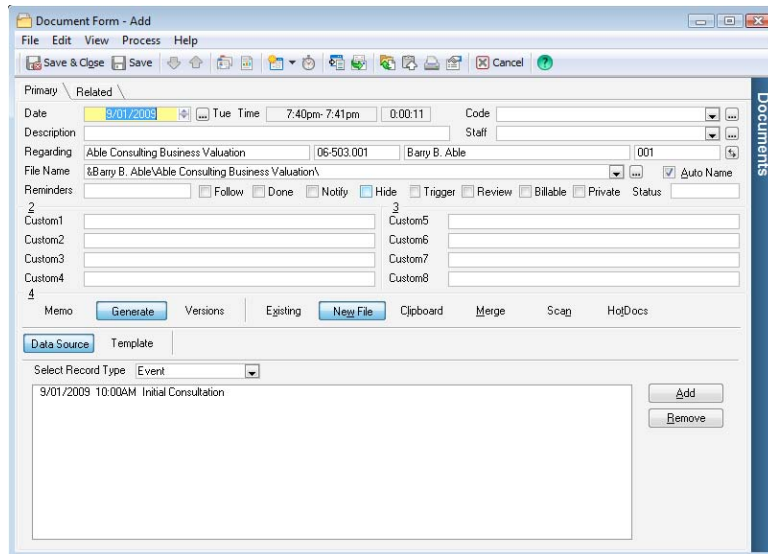
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TIP:

Be a Time Matters expert! Using shortcut keys saves a lot of mouse movements and gets you to your records fast. Instead of creating a document from the menu use the CTRL-SHIFT-D method instead. Those seconds you save really add up!



Notice that so much is already filled in for us, including the beginnings of where this document will be saved (thanks to our AutoNaming setup):

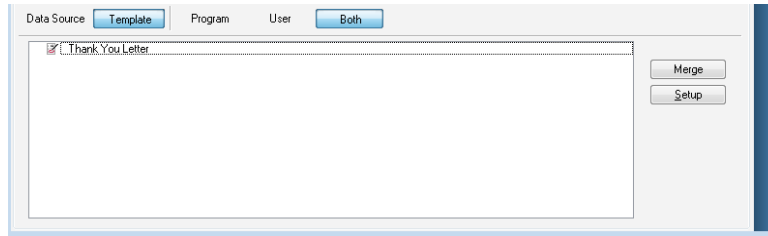


After we fill out the normal information, such as code, description and staff, we need to select our merge template. Click the Merge button:

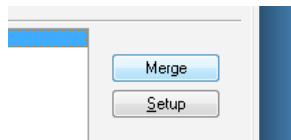


Then click the Template button to show us all of our available templates and we see the letter we created earlier:

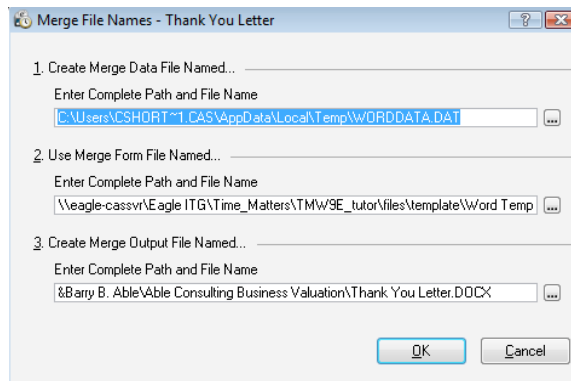
Eagle ITG Training Series – Time Matters Document Automation



We select the template we want to use and click Merge:



Time Matters will let us know what it is creating and where. We can change things at this point, but since we have set up AutoNaming we really don't need to. We just need to click OK:



And our letter comes up in our word processor (note, in WordPerfect you will need to click the Merge button to cause WordPerfect to merge the letter):

Barry Able
Able Consulting
Principal
1000 Hillside Road
St. Paul, MN 55101

Dear Barry,

Thank you for engaging Brown, Campos & Marshal! Our meeting on 09/01/2009 was very productive and we're certain that your Able Consulting Business Valuation will be settled quickly and equitably. If you have any questions, please don't hesitate to contact us.

Warmly,

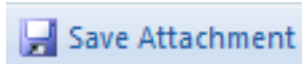
Robert S. Brown
Managing Partner

No need to TM Save this document, it's already in Time Matters and ready to go!

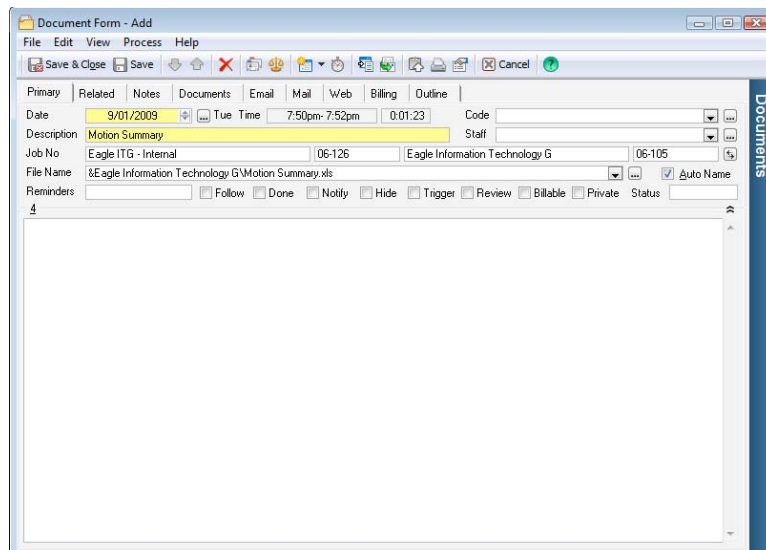
4.3 Scenario #3: Attaching a File And Serve

Opposing counsel has filed a motion that was sent to us via File and Serve, we need to attach that document to Time Matters and generate a response.

We open our email in Outlook and click the TM Save Attachment button:



A Time Matters document record will pop up, we need to simply fill in the form and our attachment is automatically saved for us (if AutoNaming is set up). Note that Time Matters will not inherit the file name, this is so you can type your own meaningful name for the document:



4.4 Scenario #4: Attaching a Group of Legacy Documents

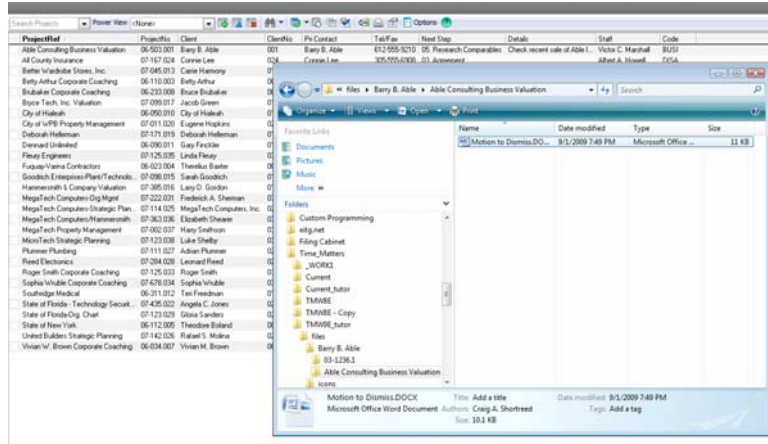
So now we know how to attach documents to Time Matters and generate them from Time Matters, we still need to bring in all of our old documents! There are many variables and planning that you may want to do, but the process of getting them into Time Matters is the same.

While you can link them one by one, the easiest method is to drag and drop them. First open your matter list:

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| Project/Staff | Project/No | Client | Client/No | PI Contact | Tele/Fax | Next Step | Details | Staff | Code |
|------------------------------------|------------|------------------|-----------|------------------|--------------|-------------------------------|---------------------------------|--------------------|------|
| Able Consulting Business Valuation | 06-503-001 | Barry B. Able | 001 | Barry B. Able | 612-955-5210 | 05. Research Comparable | Check recent sale of Able I. | Victor C. Marshall | BU5I |
| All County Insurance | 07-167-024 | Corne Lee | 024 | Corne Lee | 305-955-6369 | 03. Agreement | | Albert A. Howell | OSIA |
| Better Wardrobe Stores, Inc. | 07-045-013 | Carnie Hamony | 013 | Carnie Hamony | 912-955-4239 | 03. Follow-up Communi... | She is out of town until aft... | Barbara E. Angella | OPPO |
| Betty Arthur Corporate Coaching | 06-110-003 | Betty Arthur | 003 | Betty Arthur | 305-955-9033 | 05. Ongoing Coaching | | David B. Malone | COAC |
| Brubaker Corporate Coaching | 06-223-008 | Bruce Brubaker | 008 | Bruce Brubaker | 516-255-1492 | 01. Project Letters & Chec... | | Rebecca S. James | COAC |
| Byace Tech, Inc. Valuation | 07-099-017 | Jacob Green | 017 | Jacob Green | 704-955-5632 | 04. Meet with Lawyers/In... | | Albert A. Howell | BU5I |
| City of Hialeah | 06-050-010 | City of Hialeah | 010 | City of Hialeah | 305-955-7711 | 01. New Opportunity | | Robert S. Brown | OPPO |
| City of WPB Property Management | 07-011-020 | Eugene Hopkins | 020 | Eugene Hopkins | 354-955-6189 | 04. Initial Interview | | Victor C. Marshall | OPPO |
| Deborah Heileman | 07-171-013 | Deborah Heileman | 013 | Deborah Heileman | 305-955-6021 | 05. Product Demo | | Robert S. Brown | OPPO |

Now open a Windows Explorer window (right click your Start button and select Explore). Navigate to where your documents are, making sure to resize your Explorer window so you can still see Time Matters in the background:



Now simply drag all files (you can select multiple files and folders) over the top of the matter these files belong to. When you drop them on the Time Matters matter, you get the following dialog (or a single document form if you selected just one document):

Create Document Profile Records (2)

1. General Options...

Preview Each Document/File Record before Importing Each Document

Create All Document/File Records and Import Documents without Preview

2. Common Entries...

Complete Description Field Using...

File Name Only

Full Path and File Name

Convert Path Characters (\) to spaces

Use the Following Description...

Include Subdirectories

Complete Date/Time Fields Using...

Use Document Date/Time Use Current Date/Time

Complete Common Fields with the Following...

Code:

Staff:

Status:

Client: Barry B. Able

ClientNo:

Project: Able Consulting Business Valuation

Project No.: 06-503-001

OK Cancel

We'll review the options:

- **General Options**
If you want Time Matters to show a document record for each document that is imported, use the first option. Typically this is cumbersome for more than two or three documents and you'll want to batch process them and use the second option 'Create All Document/File Records and Import Documents without Preview'
- **Common Entries**
Here you can define how the description of the document will read. By default it will pick up the name of the file and use that, but you could change the option if you want or even give a static name to all the documents. Whatever you choose, the actual document name itself on your hard drive remains unchanged.
- **Complete Common Fields**
If you want every document to have the same code, staff, status, client or matter you can specify that here. By default Time Matters will inherit the matter and client because you dropped the files on a matter.

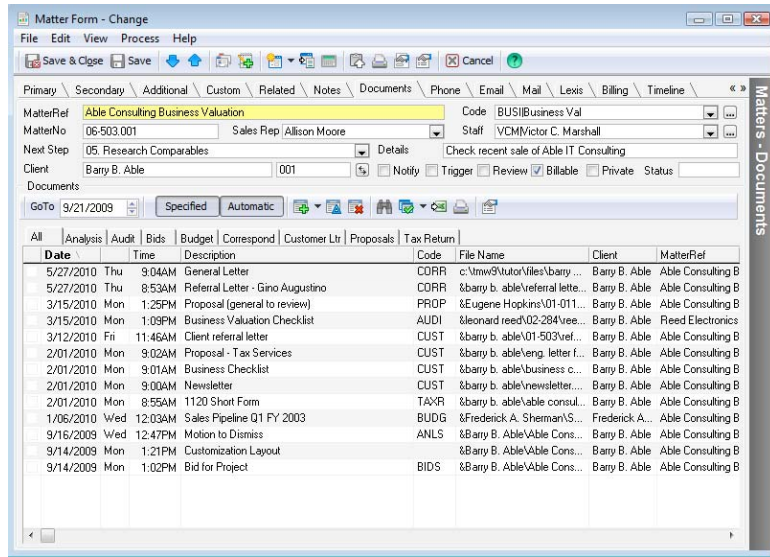
Click OK and all your documents are imported.

4.5 Scenario #5: Email a PDF Copy of a Document

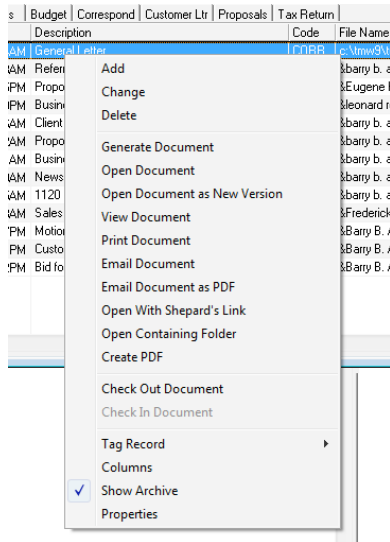
In today's practice, sending a PDF file is just about as common as answering the phone! Until now you had to purchase a PDF generator program such as Adobe Acrobat Professional, at \$300 per seat, to create a PDF file to send, but Time Matters has that functionality built in – for free!

Once you have created a document, converting that document to a PDF is simple. To start, open your client or matter and go to their documents:

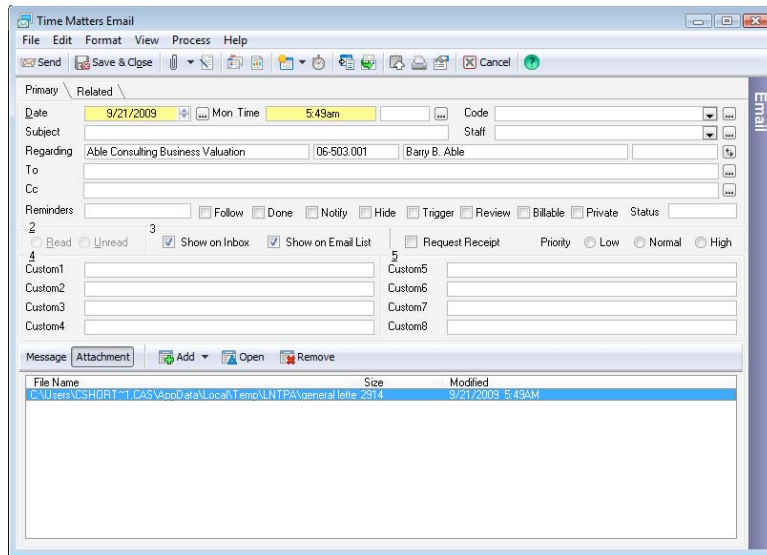
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If you've never explored right clicking in Time Matters, now is the time to learn what else you can do by right clicking! Right click on your document and you will get a menu of options for this document:



You will see that you have the option to Create PDF or Email Document as PDF. For our example we'll select the email option. You will see some screen flashing where the PDF is generated from your document, then a Time Matters email record is created with your PDF as the attachment:



Now you simply fill in the form and email it.

5 Tips & Tricks

Most tips and tricks can be found in the margins of this document, but there are a few others that are handy to know about.

5.1 Incorporating Signature Lines in Formattable Clipboards

You know that you can add the name of the person generating the document to a Formattable Clipboard, but often times you may want to also add their signature. Here's one way you can do that.

Have a special code for your internal staff. In my example, I'm using 'STAF' as the code. Customize the record to include any special fields you may want on your documents:

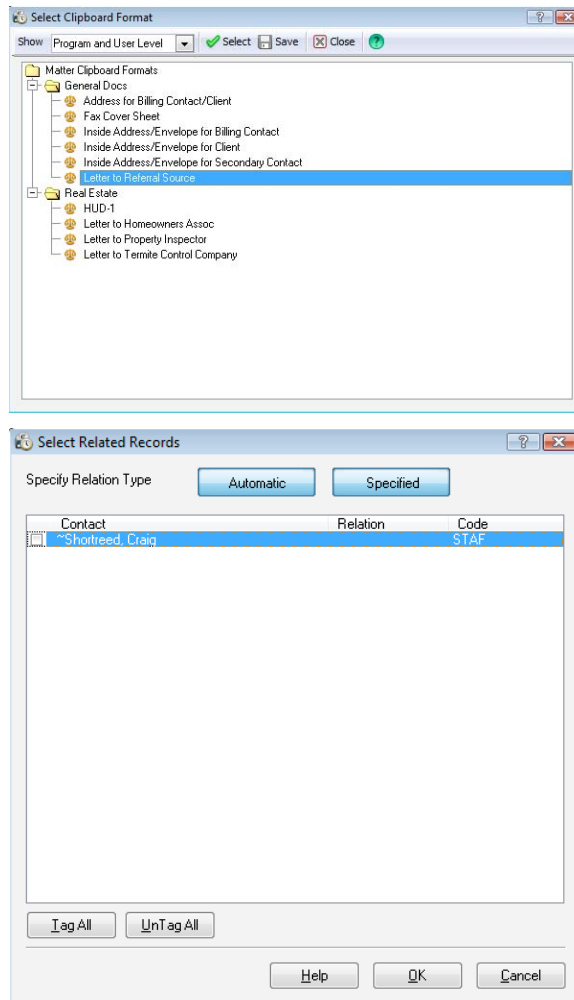
Eagle ITG Training Series – Time Matters Document Automation

Then relate your staff to the matter (go to the matter, select the related tab and click the green plus):

In your Formattable Clipboard, add an additional select statement to choose the staff who is signing this document:

Now generate your Formattable Clipboard:

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And your signature is incorporated:

With kindest regards, I am

Very truly yours,

**Craig A. Shortreed
Senior Consultant
Eagle ITG**

CC: Rhiannon Szympruch

If you have a small firm you can also use a series of “If” statements to create your signatures as well.

5.2 Automating Document Assembly

Using AutoEntry forms can make creating documents for your staff a breeze. AutoEntry forms don’t have to be just about filling in fields on your Time Matters forms, they can also pre-select your template as well.

Create your AutoEntry form and select the template to associate with it, then when you use that AutoEntry form the document template is already selected and you simply have to click MERGE.

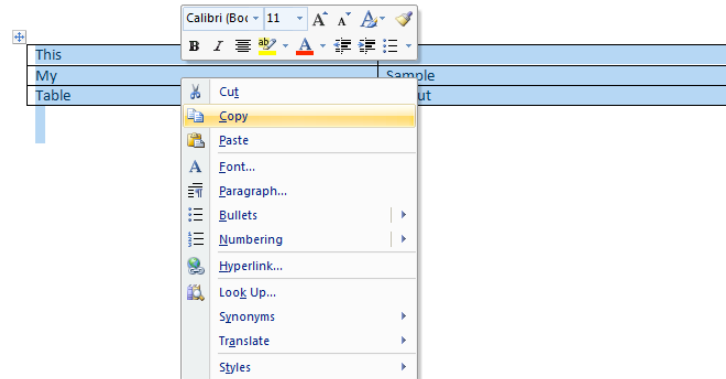
5.3 Getting Lines in a Formattable Clipboard

Formattable Clipboards have the disadvantage of not being able to have complex formatting, so many times a firm may use a merge template when they really need the added functionality of Formattable Clipboards. You can do some formatting in Formattable Clipboards with a little imagination.

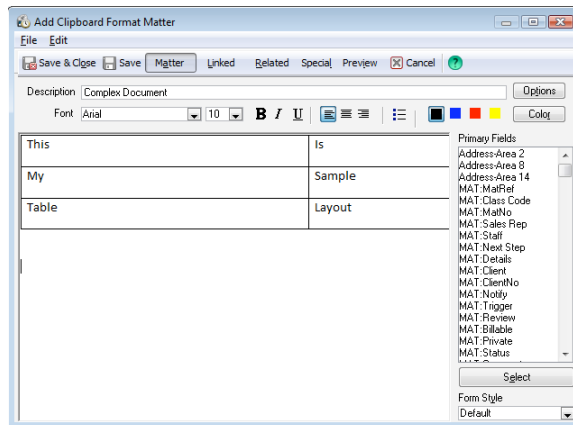
To start, create a table in Microsoft Word:

| | |
|-------|--------|
| This | Is |
| My | Sample |
| Table | Layout |

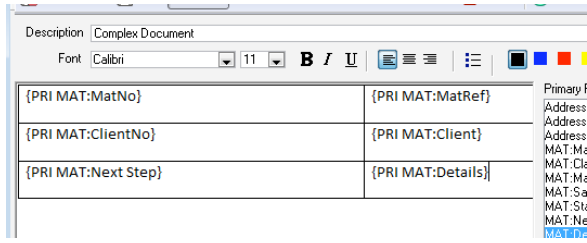
Then copy the entire table to your Windows clipboard:



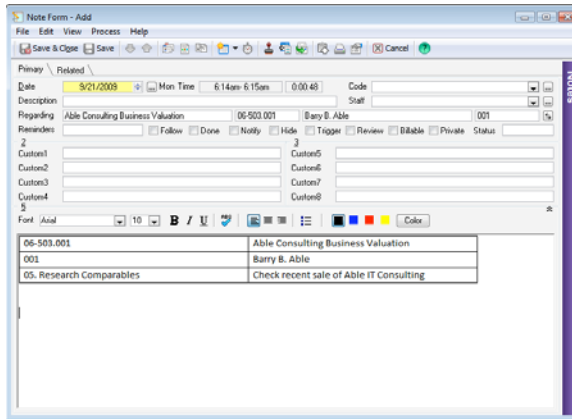
And paste it into your Formattable Clipboard template:



Then add your fields:



And try it out by pasting into your word processor or the memo area of a form:



6 Questions or Comments?

If you have a tricky document automation or management question, feel free to drop me an email:

Craig Shortreed
Senior Consultant
Eagle ITG
cshortreed@eitg.net