

Time Matters® and Billing Matters® Installation Guide

Version 13



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About this guide

The Installation Guide provides a list of tasks for installing LexisNexis Time Matters® and Billing Matters® Practice Management Software. If you need additional information, please refer to the online [Support Center](#).

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Pre-installation steps

Do the following before you begin installing Time Matters or Billing Matters.

Determine who should install the software

The installation procedure is simple, but it is advisable that you choose a person familiar with your firm's computer systems, such as:

- An Information Technology professional
 - A LexisNexis Certified Independent Consultant (CIC)
To locate a CIC near you, see <http://law.lexisnexis.com/spn/findcic>
 - A sole practitioner, or the person with primary responsibility for your firm's computers
-

Choose where to install the database

Your first installation should be on the server computer that will host the application's database. Use the following checklist to select a computer.

- The computer must meet the system requirements.
 - The computer must be connected to your firm's network so that all Time Matters and Billing Matters users have access to the shared database. (If you are the only user in your firm, you can install the application's database on your primary work computer, even if it lacks a network connection.)
 - If your firm requires a large database (10GB or more), the computer should be running the full version of Microsoft SQL Server database software. If you do not already have SQL Server, a free version (SQL Server Express Edition) is available for download from Microsoft.
-

Install SQL Server

SQL Server 2008 R2 or later must be installed on the server computer where your Time Matters/Billing Matters database will reside.

If you do not already have SQL Server, you can download and install a free version from the Microsoft web site. Use the following links to download the version of SQL Server Express recommended for your version of Microsoft Windows.

- Windows Vista or later: <http://www.microsoft.com/sqlserver/en/us/editions/2012-editions/express.aspx>
- Windows XP: <http://www.microsoft.com/en-us/download/details.aspx?id=30438>

Installation Notes

When you run the downloaded file, select the option to create a new installation or add features to an existing installation. A wizard opens to guide you through the installation process.

On the Database Engine Configuration page of the wizard, do the following:

1. In the Authentication Mode area, select **Mixed Mode**.
2. Enter a password for the SQL admin account. **Write down this password immediately** and store it in a secure place. LexisNexis Support cannot help you retrieve a lost SQL Server password.

Additional Configuration

After SQL Server is installed, perform the following additional procedures.

Exclude the SQL Browser Service from the Windows Firewall:

1. On the computer running SQL Server, press the Windows Logo Key + R. The Run window opens.
2. In the **Open** box, type `firewall.cpl` and press Enter.
3. Depending on your version of Windows, do one of the following to modify the list of programs allowed through the Windows Firewall:
 - Windows XP/Server 2003: On the Exceptions tab, click the **Add Program** button.
 - Windows Vista: Click the **Add Program** button.
 - Windows 7: Click **Allow a program through Windows Firewall** and then click the **Allow another program** button.
4. Browse to either `%programfiles%\Microsoft SQL Server\90` or `%programfiles(x86)%\Microsoft SQL Server\90`.
5. Select `sqlbrowser.exe` and click **Open**. (Note: If you don't see `sqlbrowser.exe`, check the \100 or \110 folder.)
6. Click **Add** or **OK** as needed to close the open windows.

Enable the TCP/IP protocol for SQL Server:

1. On the computer running SQL Server, press the Windows Logo Key + R. The Run window opens.
2. In the **Open** box, type `SQLServerManager.msc` and press Enter. The SQL Server Configuration Manager window opens.
3. In the left pane, expand **SQL Server <version> Network Configuration** and select **Protocols for <name of SQL instance>**.
4. In the right pane, right-click **Named Pipes** and select **Enable**.
5. Right-click **TCP/IP** and select **Enable**.
6. Right-click TCP/IP and select Properties. The Properties window opens.
7. On the IP Addresses tab, locate and select at least 1 valid IP address (but not 127.0.0.1) in the list and change the **Enabled** field to **Yes**.

8. Click **OK** to close the Properties window.
9. In the left pane, click **SQL Server <version> Services**.
10. In the right pane, right-click the name of your SQL Server instance and select **Restart**.

For additional information, see the following LexisNexis Support Center article:

<http://support.lexisnexis.com/timematters12/record.asp?articleid=11152>

Gather needed materials and information

Have the following information on hand for your first installation:

- A copy of the entitlement email containing your product key and the software download link
- A user login with administrator rights on the computer where you will install the software
- The SQL Server administrator password
- (New installations only) A list of people in your firm who will be using Time Matters or Billing Matters. Include each person's email address. This list will help you during post-installation setup when you create user accounts.

Download the installation software

Follow these steps to download the installation program for Time Matters and Billing Matters.

1. After purchasing the software, you will receive an email with your product key and a download link. Click the link to open the Product Entitlements page in your web browser.
2. Click the New installation link if your firm is installing Time Matters or Billing Matters for the first time, or click the Upgrade installation link if you are upgrading from a previous version.
3. A web page with download and installation instructions opens.
4. After reviewing the information on the web page, click the Download button at the bottom of the page. Save the file to your computer, making a note of the file's location.
5. If necessary, transfer the downloaded file to the server computer where you want to install the database.

When you are ready to begin the installation, see *Install the Database on Your Server*.

Install the database

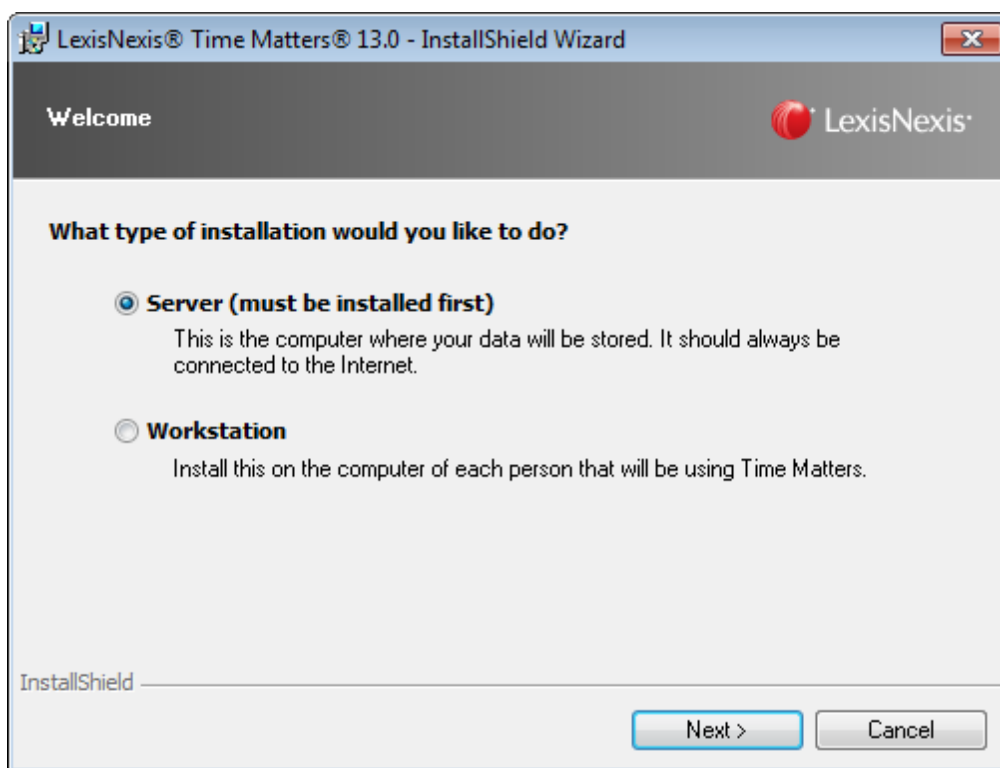
After you complete the pre-installation steps, you are ready to begin installing the database.

1. Close all open applications on the computer and then double-click the installer file that you downloaded, `setupe.exe`. The installation wizard opens.

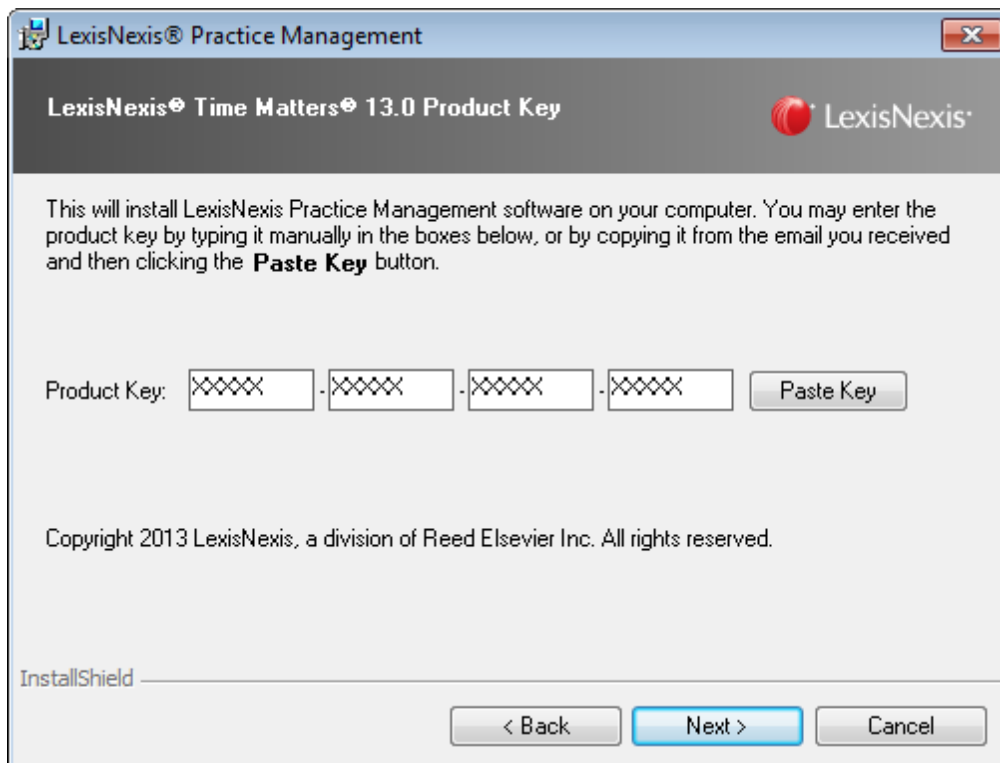
Note

If the .NET 4.0 Framework is not on your computer, it will be installed at this point. This may take several minutes to complete, during which the installation will not proceed.

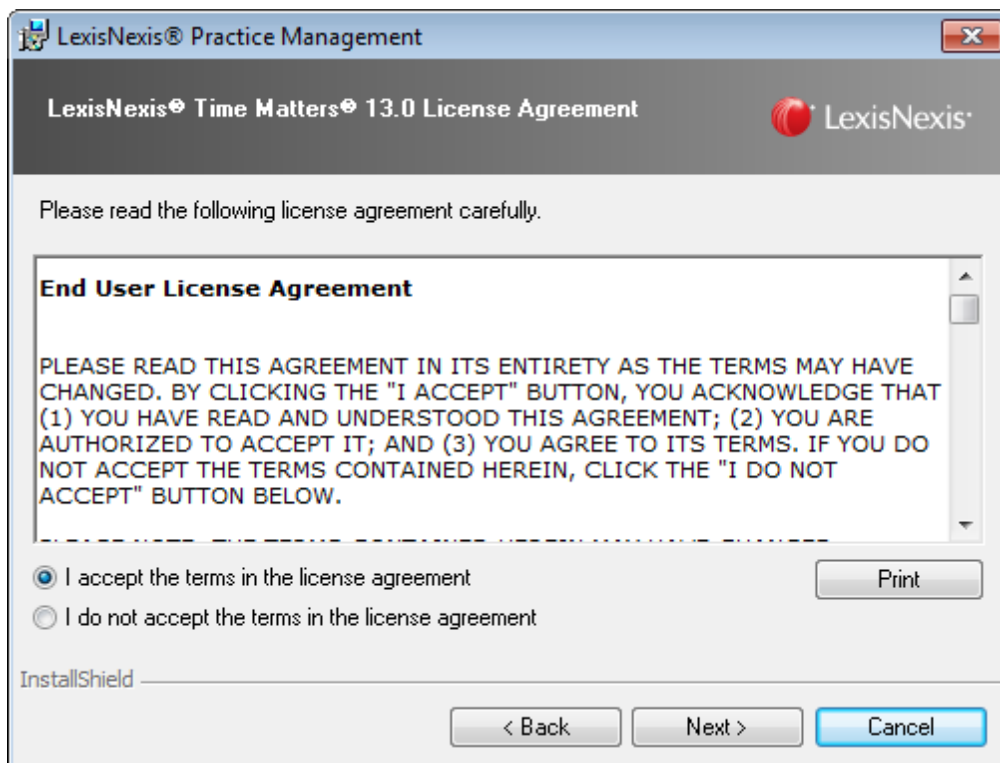
2. Select **Server** on the Welcome page.



3. Click **Next** to continue to the Product Key page.
4. Complete the **Product Key** boxes. You can copy the product key in your entitlement email and then click the **Paste Key** button, or you can type the product key into the fields manually.

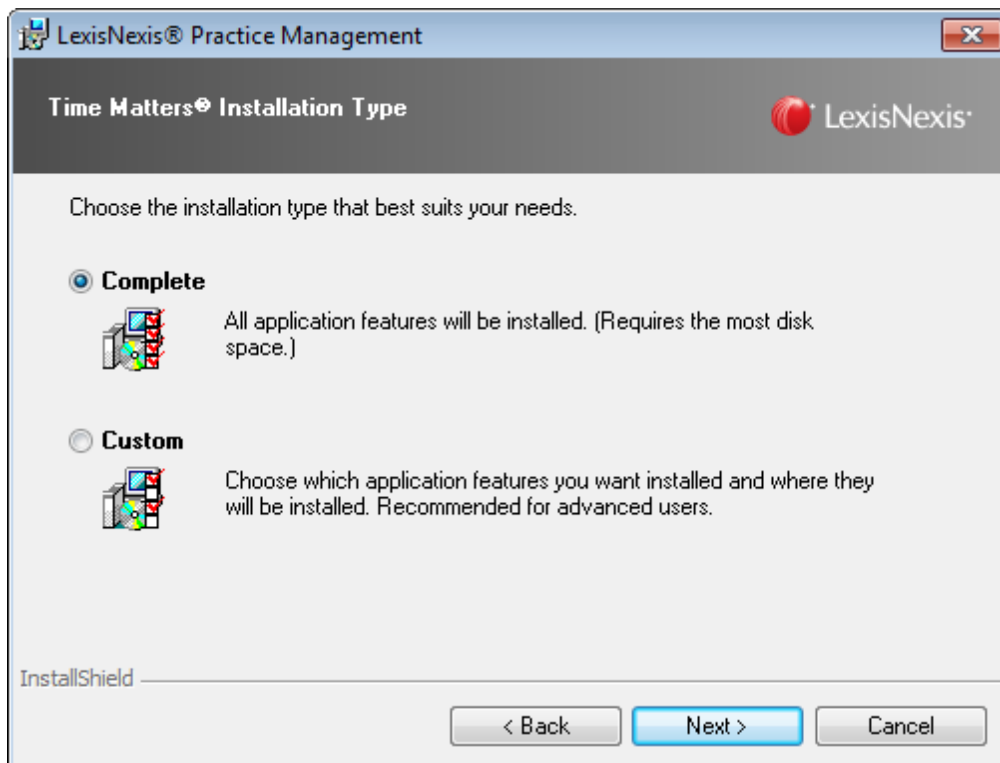


5. Click **Next** to continue to the License Agreement page.
6. Review the license agreement. When you are finished, select **I accept the terms in the license agreement**.



7. Click **Next** to continue to the Installation Type page.

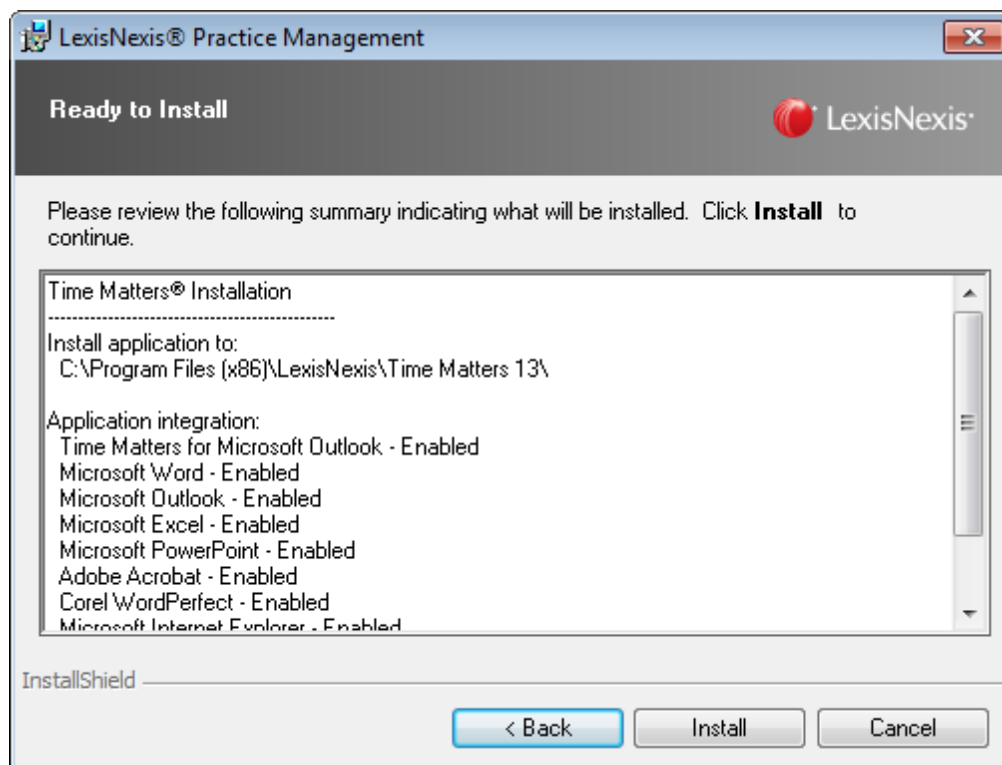
8. Select **Complete** if you want to install all program features, or select **Custom** if you want to choose the features that are installed.



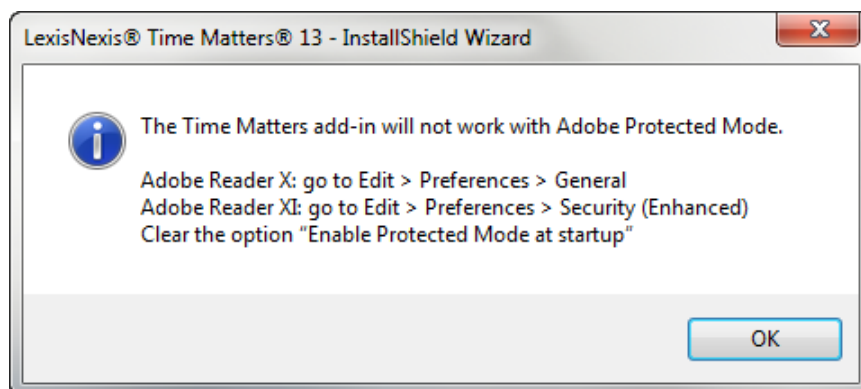
9. Click **Next** to continue.

- If you selected **Complete**, click **Next** and continue to step 10.
- If you selected **Custom**, do the following:
 - a. Specify the folder in which the application files will be installed. To select a folder, click **Change** and browse to the desired folder, then click **OK**.
Click **Next** to continue to the Custom Setup page.
 - b. Choose the program features you want to install. To change the status of a feature, click the icon beside that feature and select either the option to install the feature or the option to not install the feature.
Click **Next** to continue to the Ready to Install page.

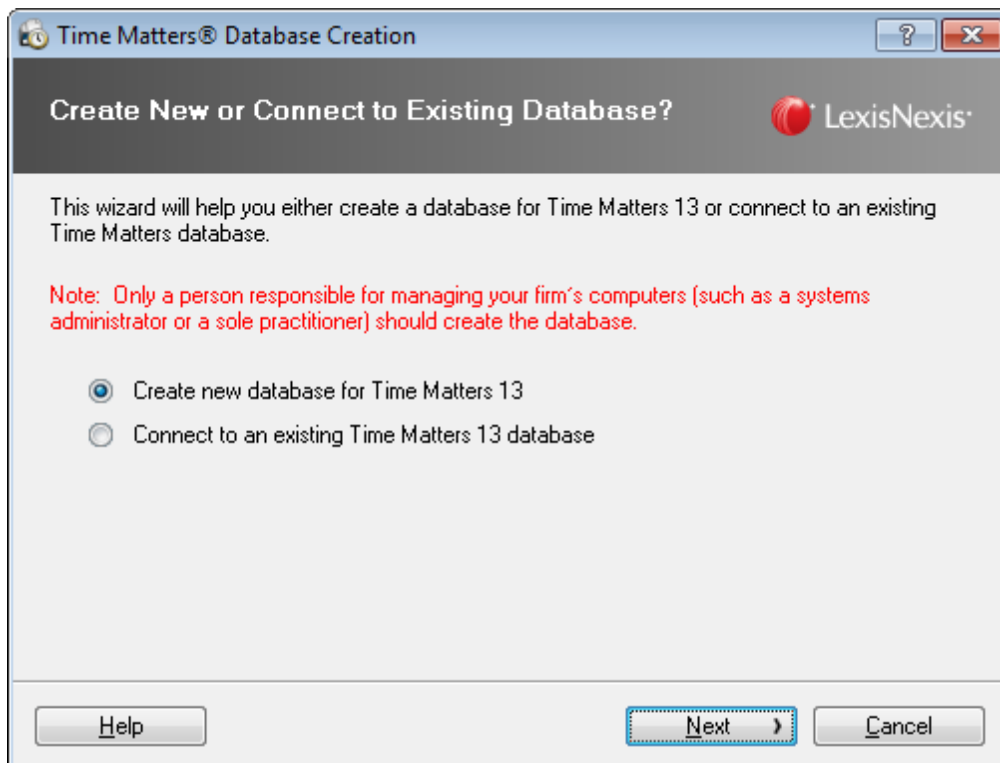
10. Review the installation settings.



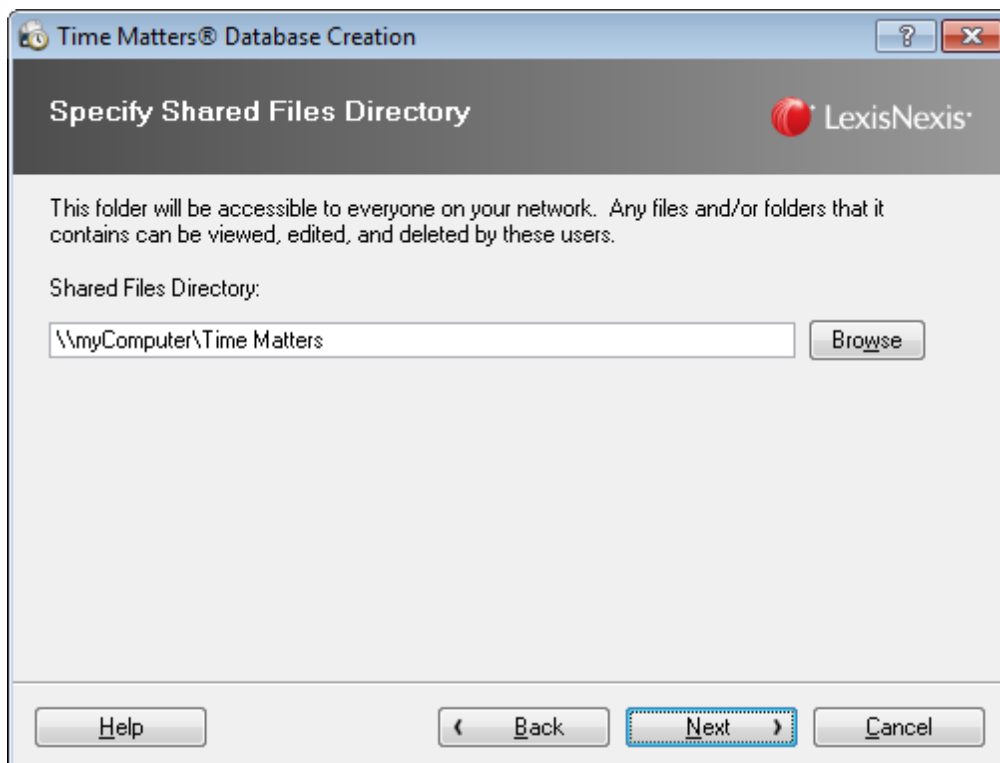
11. Click **Install** to begin the installation.
12. If Adobe Reader is detected on your computer, an information message will open. For instructions, see [Disable Protected Mode in Adobe Reader](#).



13. When the client application has been installed, the Installation Complete page appears. Click **Next** to close the installation wizard and open the Database Creation wizard.
14. Select **Create new database for Time Matters 13**.



15. Click **Next** to continue to the Specify Shared Files Directory page.
16. If you want to specify a different folder in which to store shared document files, click **Browse**, select the folder you want to use, and then click **Open**.

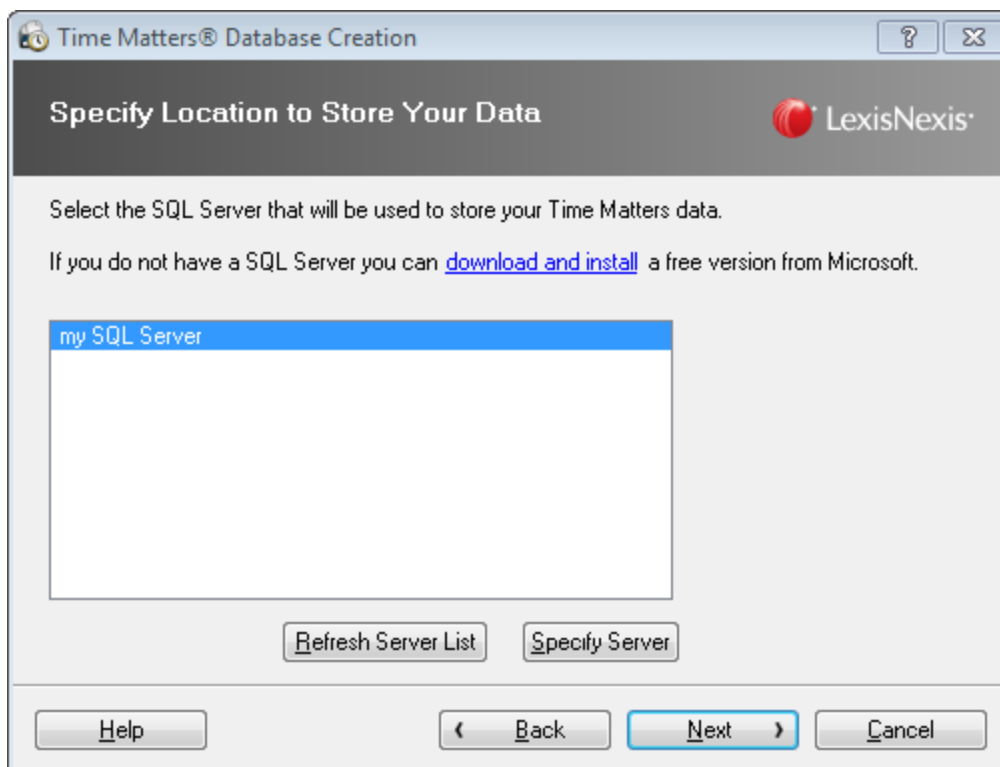


Note

If you are upgrading from a previous version of Time Matters or Billing Matters, the **Shared Files Directory** box is pre-filled with your existing shared files folder. If you specify a different folder, you must copy all the files from your previous shared files folder to the new folder so that those files will be available in version 13.

17. Click **Next** to continue to the Specify Location to Store Your Data page.
18. Select the SQL Server that will host your database.

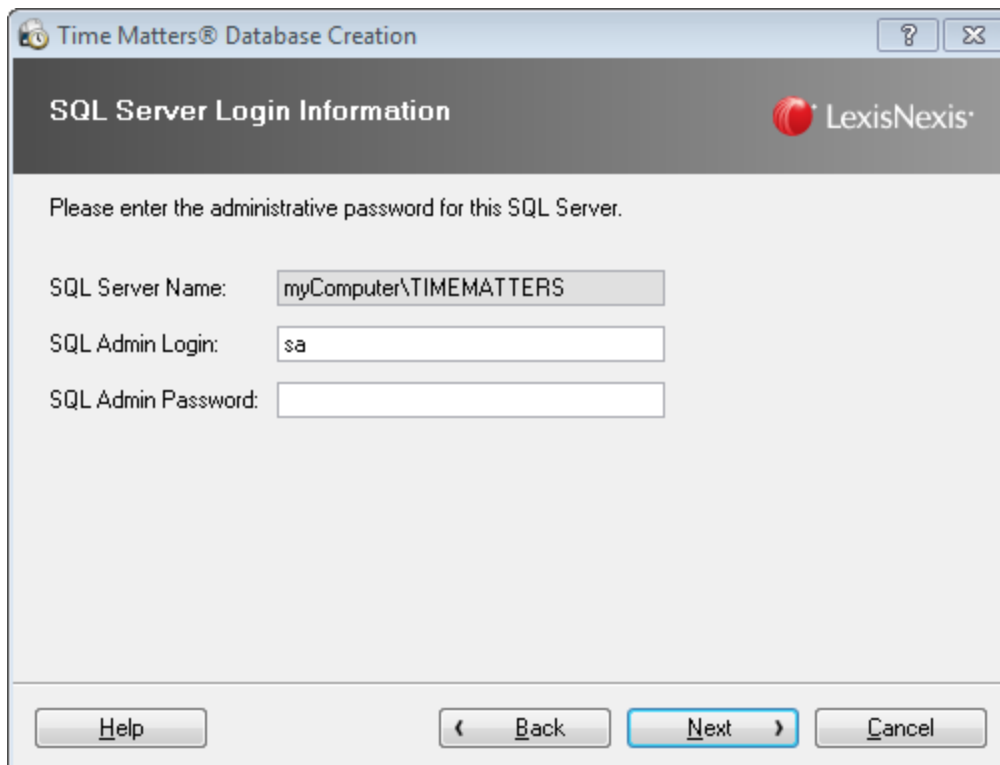
If your SQL Server does not appear in the list, click the **Specify Server** button. Type the name of the computer running SQL Server and click **OK**. (If you have SQL Server Express Edition, type `\SQLEXPRESS` after the computer name.) The name you typed appears in the list of SQL Servers and can now be selected.



Note

If you do not have SQL Server, click the blue hyperlinked text "download and install". On the screen that opens, click the version of SQL Server Express recommended for your Windows version. For instructions on downloading and installing the software, see [Install SQL Server](#). After SQL Server is installed, restart the Time Matters database creation wizard.

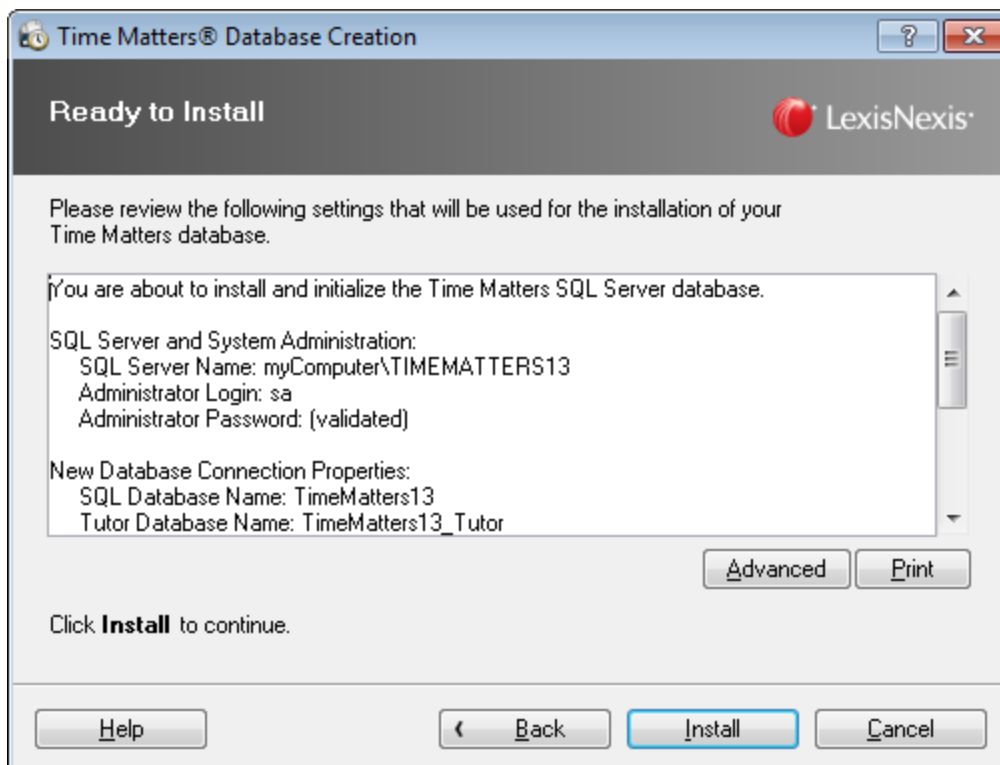
19. Click **Next** to continue to the SQL Server Login Information page.
20. Enter the SQL Server administrator password in the **SQL Admin Password** box.



The dialog box is titled "Time Matters® Database Creation" and "SQL Server Login Information". It contains a LexisNexis logo. The text says: "Please enter the administrative password for this SQL Server." There are three input fields: "SQL Server Name:" with the value "myComputer\TIMEMATTERS", "SQL Admin Login:" with the value "sa", and "SQL Admin Password:" which is empty. At the bottom, there are buttons for "Help", "Back", "Next" (highlighted with a blue border), and "Cancel".

21. Click **Next** to continue to the Ready to Install page.
22. Review the settings that will be used to create the database.

If you need to modify advanced settings that control database size and growth, click the **Advanced** button.

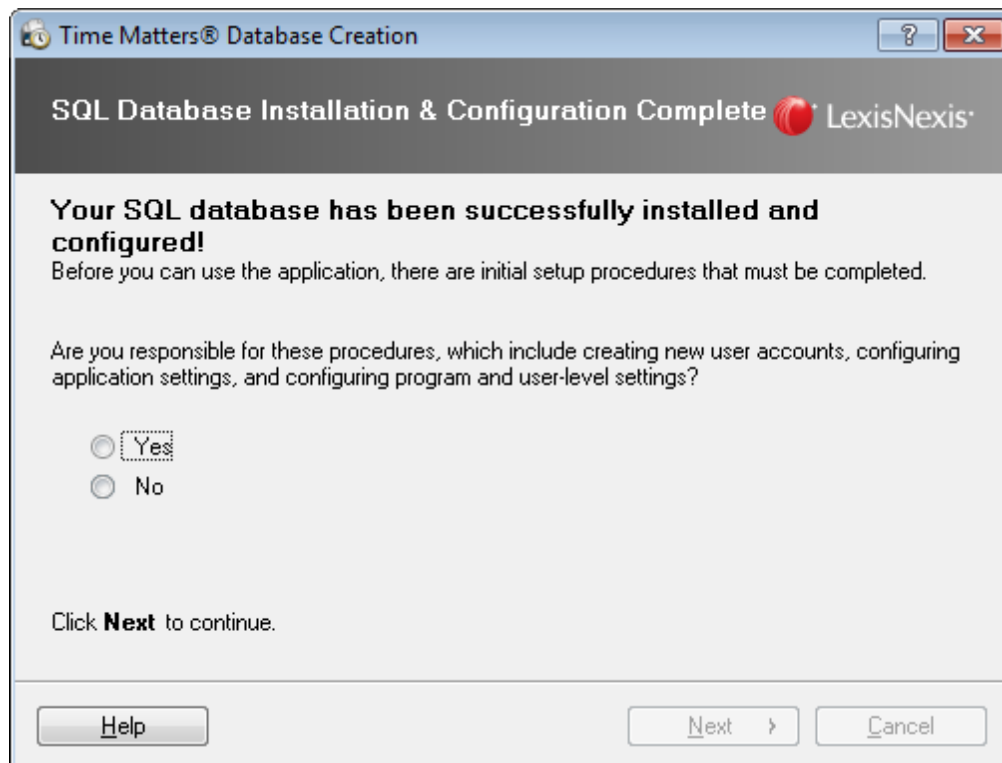


The dialog box is titled "Time Matters® Database Creation" and "Ready to Install". It contains a LexisNexis logo. The text says: "Please review the following settings that will be used for the installation of your Time Matters database." Below this is a text area with the following content: "You are about to install and initialize the Time Matters SQL Server database." followed by "SQL Server and System Administration:" and "New Database Connection Properties:". The "SQL Server and System Administration:" section lists: "SQL Server Name: myComputer\TIMEMATTERS13", "Administrator Login: sa", and "Administrator Password: (validated)". The "New Database Connection Properties:" section lists: "SQL Database Name: TimeMatters13" and "Tutor Database Name: TimeMatters13_Tutor". At the bottom right of the text area are buttons for "Advanced" and "Print". Below the text area, it says "Click **Install** to continue." At the bottom of the dialog box, there are buttons for "Help", "Back", "Install" (highlighted with a blue border), and "Cancel".

23. When you are ready to create the database, click **Install**.

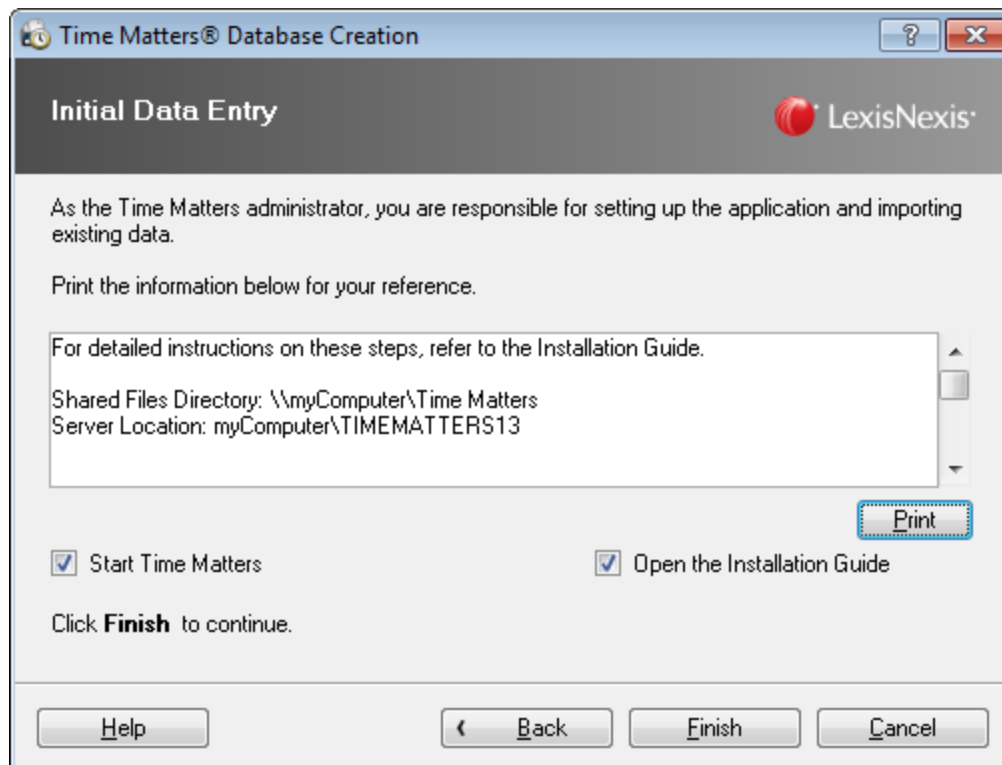
When the database creation process is complete, the SQL Database Installation & Configuration Complete page appears.

24. Select **Yes** if you are responsible for setting up the software users and configuration settings, or select **No** if someone else will set up the software.



25. Click **Next** to continue.

- If someone else will set up the software, the wizard displays information for you to copy and send to that person.
- If you will set up the software, the wizard displays information and instructions that you should print for your reference.

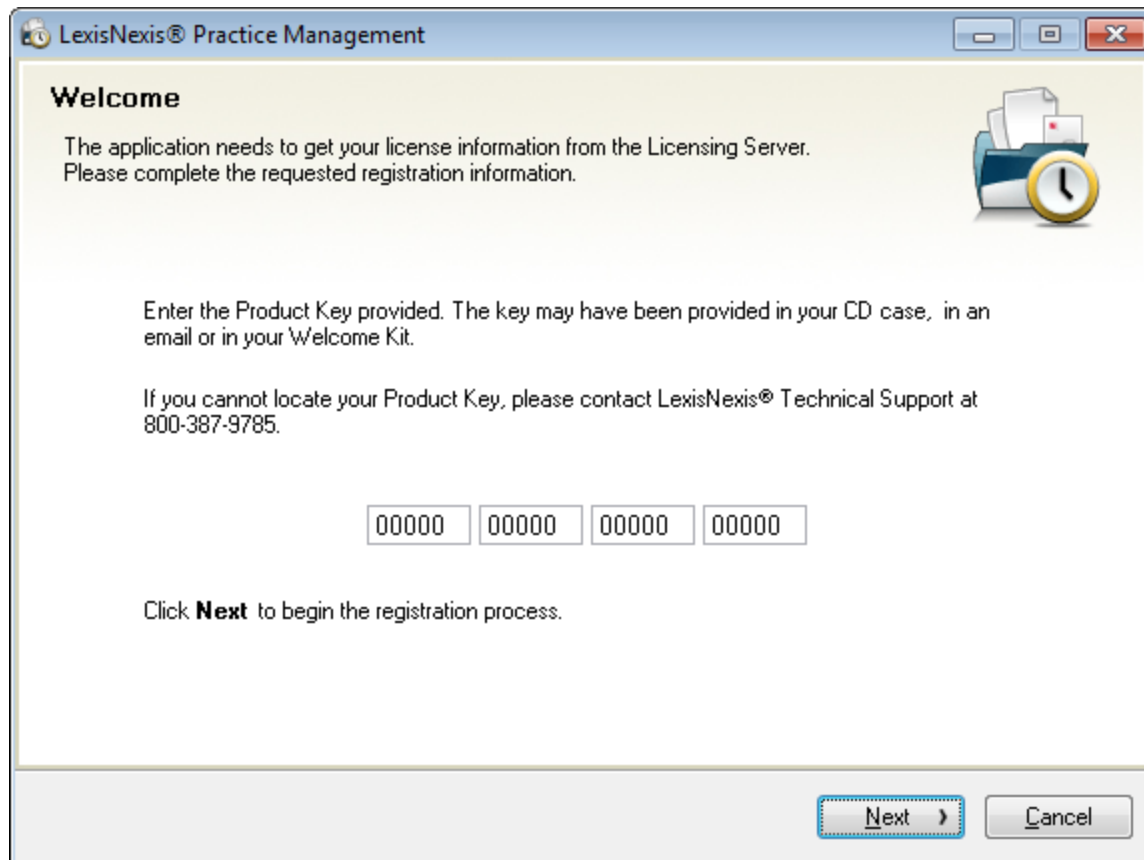


26. Click **Finish** to close the wizard.

Next, you must register the software.

Register the software

The first time you start the application, it will automatically attempt to connect to the LexisNexis licensing server so that your database can be registered.



Click **Next** to send the registration information.

When the registration is complete, click **Finish**. The application will start. (If you are an upgrade customer and your previous version of the software is detected on the server, you will be prompted to import data. Instructions are available later in this guide.)

The next step is to set up the application. The remainder of this guide provides instructions on how to set up the application depending on whether your firm is new to Time Matters/Billing Matters or whether you are upgrading from a previous version.

Create an initial user and configure basic settings

After you have installed and registered the software, a wizard will open to help you create a user account and enter basic program settings. The user account you create using this wizard is given administrative rights by default (this can be changed later from within the application).

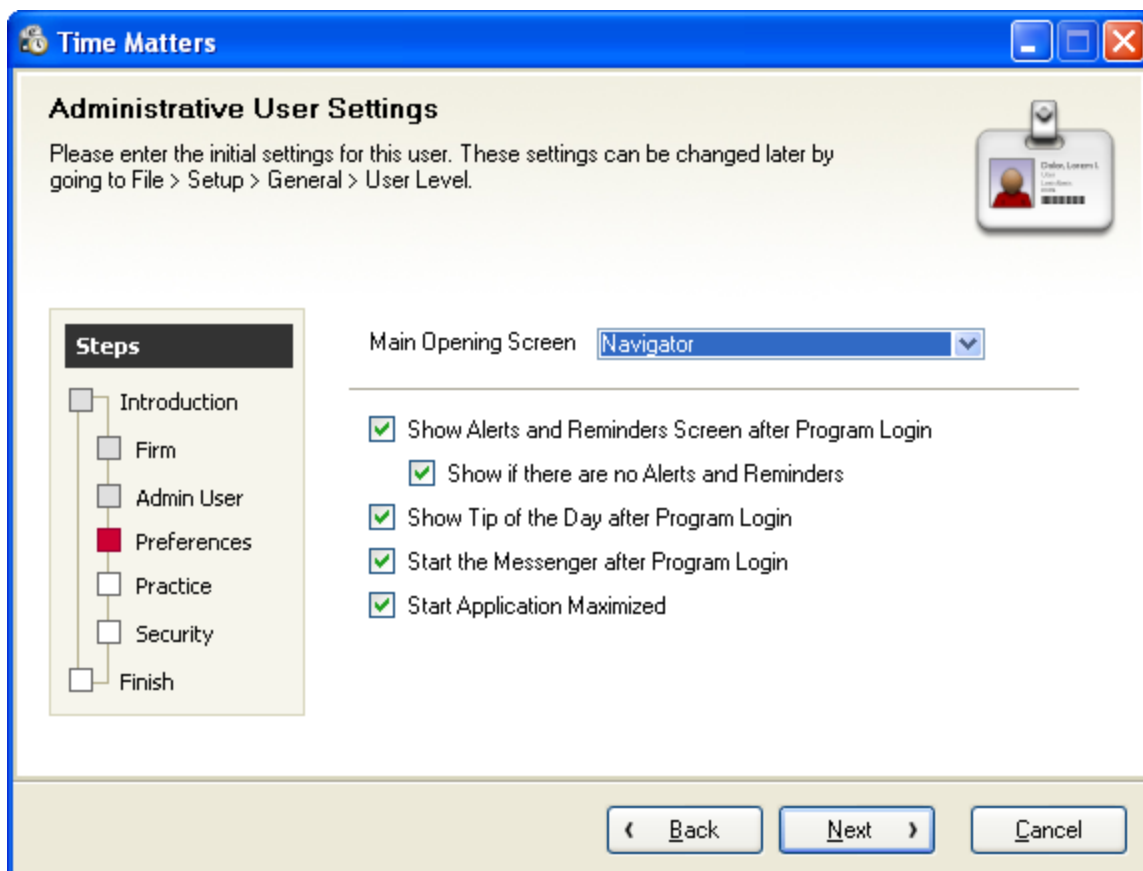
Note: If you are upgrading from a previous version, the wizard will not open. Instead, the user accounts and program settings from your previous version will be imported.

1. Click **Next** to continue past the Welcome screen.
2. Enter the name, address, and phone/fax numbers of your firm.
3. Click **Next**.
4. Enter the name of the initial user, a User ID, and a password. You will use the User ID and password to access the application. A Staff member will also be created for this user account. The Staff initials are based on the initials of the names you enter. If desired, you can change the Staff initials later from within the application.

The screenshot shows the 'Time Matters' window titled 'Administrative User Information'. It includes a 'Steps' sidebar with options: Introduction, Firm, Admin User (selected), Preferences, Practice, Security, and Finish. The main area contains instructions to enter administrative user information. It has input fields for First Name*, MI, and Last Name*, followed by a note about user identification. Below are fields for User ID*, Password, and Confirm Password, with a checked checkbox for 'Change Password at Next Login'. A note advises writing down the User ID and Password. At the bottom, there is a field for 'Initials of Staff to be used for identification in the application' and a red asterisk legend indicating required fields. Navigation buttons for Back, Next, and Cancel are at the bottom right.

5. Click **Next**.
6. Select the options you want in effect when you log in. These options are specific to your User ID, and can be changed later.

- **Main Opening Screen:** Select the program screen you want to open automatically. If you do not want a screen to open, select “Main Menu”.
- **Show Alerts and Reminders Screen after Program Login:** If selected, the Alerts, Reminders and Watches screen opens automatically.
- **Show if there are no Alerts and Reminders:** If selected, the Alerts, Reminders and Watches screen opens even if there are no Alerts or Reminders to display for the current day.
- **Show Tip of the Day after Program Login:** If selected, the Tip of the Day screen opens automatically.
- **Start the Messenger after Program Login:** If selected, the Messenger opens automatically. The Messenger runs in a separate window from the main application.
- **Start Application Maximized:** If selected, the application opens in a maximized window.



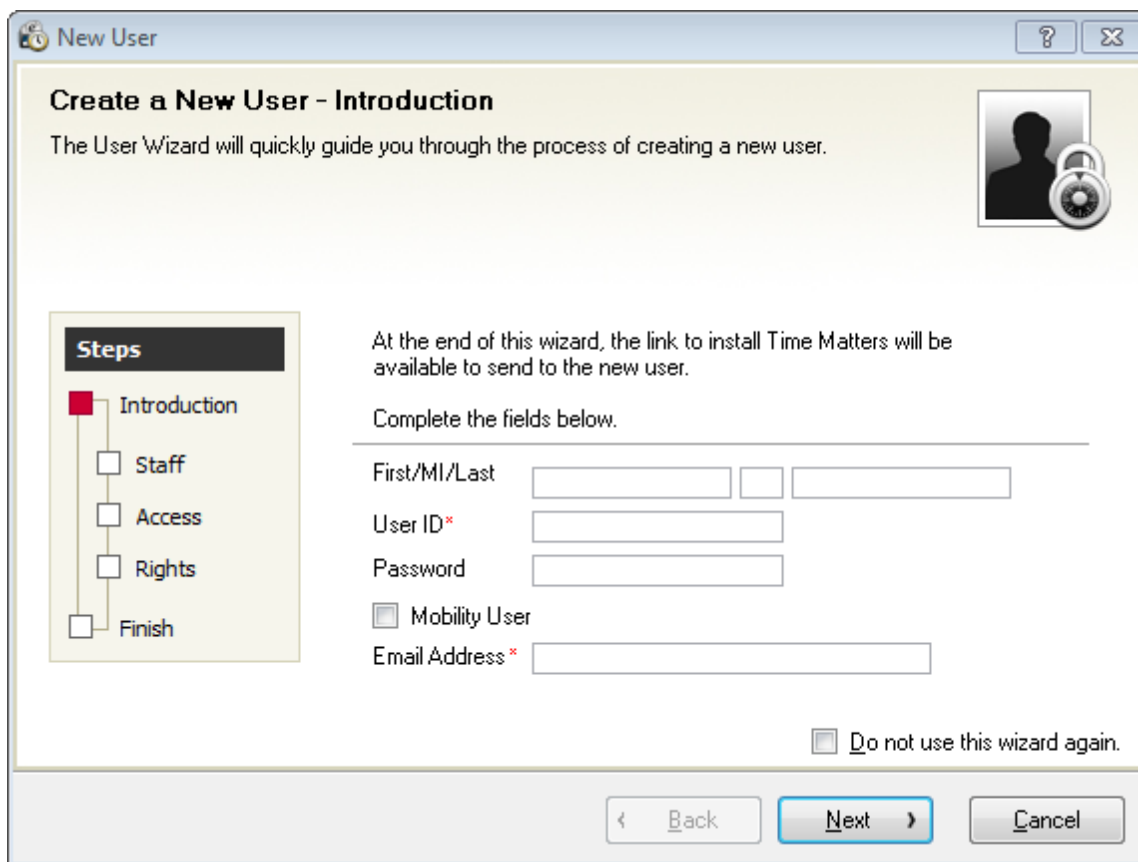
7. Click **Next**.
8. Select the Terminology type applicable to your business or practice.
9. Click **Next**.
10. Determine whether to activate Security now. To activate Security at a later time, select **No Security**. If you want to activate Security now, select **Enable Security**.
11. Click **Next**.

12. Click **Finish** to close the Initial User wizard.

You have finished entering initial user information and application settings. Next, create new user accounts to allow others in your firm to use the application.

Create user accounts

1. If the New User wizard is not already open, do the following to open it now:
 - a. Click the **File** menu, point to **Setup**, then point to **User and Security**, and then click **Users**.
 - b. On the List of Users, click the **Add** button.
2. On the Introduction page, enter the First Name, Middle Initial, and Last Name of this user.
3. Enter a user ID and password for this user.
4. Select the **Mobility User** check box if this user will be using Time Matters Mobility.
5. Enter an email address for the user.



The screenshot shows the 'New User' wizard window. The title bar says 'New User'. The main heading is 'Create a New User - Introduction'. Below the heading, it says 'The User Wizard will quickly guide you through the process of creating a new user.' On the right, there is an icon of a person and a padlock. On the left, there is a 'Steps' section with a vertical list: 'Introduction' (selected with a red square), 'Staff', 'Access', 'Rights', and 'Finish'. In the center, there is text: 'At the end of this wizard, the link to install Time Matters will be available to send to the new user.' Below this, it says 'Complete the fields below.' There are five input fields: 'First/MI/Last' (split into three boxes), 'User ID*' (single box), 'Password' (single box), 'Mobility User' (checkbox), and 'Email Address*' (single box). At the bottom right, there is a checkbox labeled 'Do not use this wizard again.' At the bottom, there are three buttons: 'Back', 'Next' (highlighted with a blue border), and 'Cancel'.

6. Click **Next** to continue to the Staff/Security page.
7. Accept the default selections on this page to create a new Staff and security settings for this user.

The screenshot shows a window titled "New User" with a subtitle "Create a New User - Staff/Security". Below the subtitle is the instruction: "Select the default Staff/Group and security settings to assign to this User ID." In the top right corner, there is a placeholder for a user profile picture and a padlock icon. On the left side, a "Steps" panel shows a vertical list of steps: "Introduction", "Staff" (highlighted with a red square), "Access", "Rights", and "Finish". The main area contains two sections: "Default Staff/Group for this User ID" with radio buttons for "Create a new Staff with this User" (selected) and "Use an existing Staff/Group" (with a dropdown menu); and "Security Settings" with radio buttons for "Individual Security Settings" (selected), "Use Settings from the Following User" (with a dropdown menu), and "Use Settings from the Following Profile" (with a dropdown menu). At the bottom right of the main area is a checkbox labeled "Do not use this wizard again." At the bottom of the window are three buttons: "Back", "Next" (highlighted with a blue border), and "Cancel".

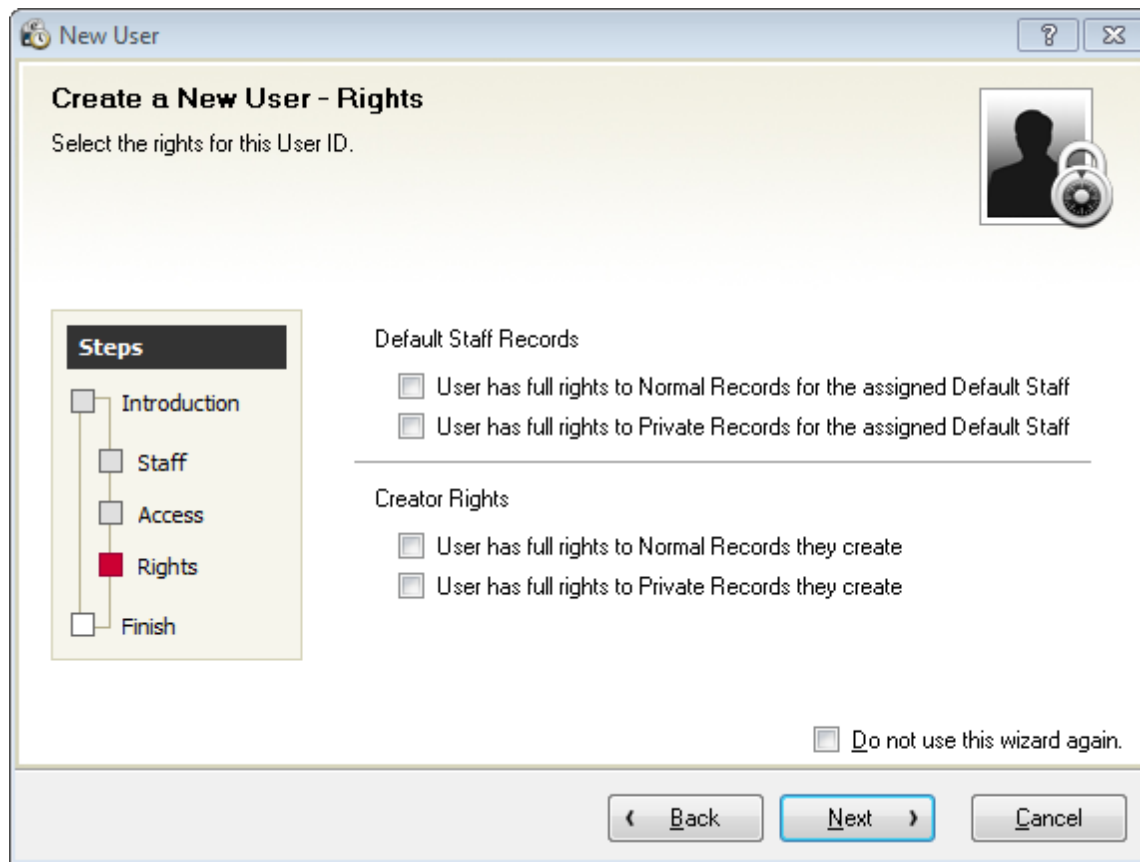
8. Click **Next** to continue to the Access page.

9. Select the user's access privileges for normal (non-private) and private records.

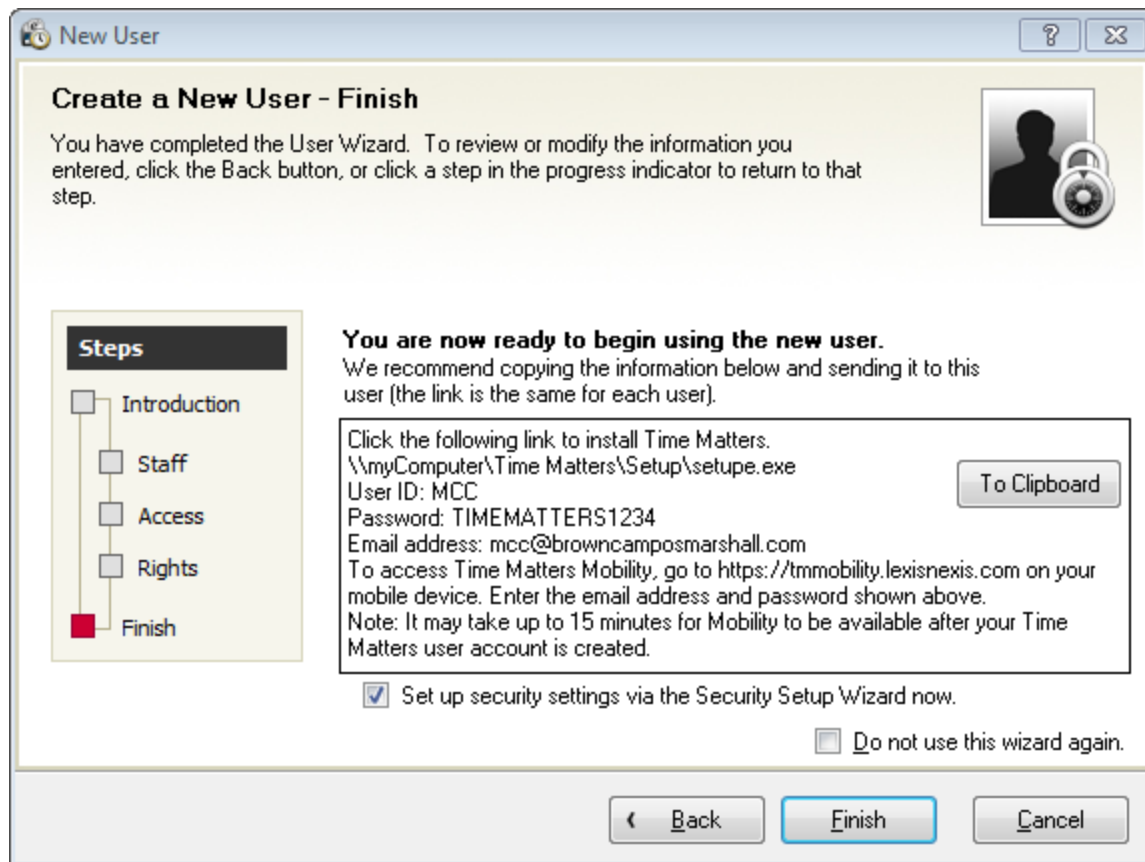
If you select **Show Records as "Restricted"** or **Show Records as "Private"**, the user will be able to see that the records exist, but will not be able to view or open the records.

The screenshot shows a Windows-style dialog box titled "New User". The main heading is "Create a New User - Access" with the instruction "Select the record access for this User ID." In the top right corner, there is a placeholder for a user profile picture and a padlock icon. On the left side, a "Steps" pane shows a vertical list of steps: "Introduction", "Staff", "Access" (highlighted with a red square), "Rights", and "Finish". The main area contains two sections of radio button options. The first section, "Normal Records without Access", has two options: "Show Records as 'Restricted'" and "Do Not Show Records", with the latter selected. The second section, "Private Records without Access", also has two options: "Show Records as 'Private'" and "Do Not Show Records", with the latter selected. Below these sections is a checked checkbox labeled "Change Password at Next Login". At the bottom right of the main area is an unchecked checkbox labeled "Do not use this wizard again.". At the bottom of the dialog are three buttons: "Back", "Next" (which is highlighted with a blue border), and "Cancel".

10. Click **Next** to continue to the Rights page.
11. Select whether to give the user full rights to view, edit, and delete records assigned to their Staff and to records they create. These rights are always granted, creating an exception to security settings that would normally restrict the user's rights to those records.



12. Click **Next** to continue to the Finish page.
13. Optionally, click the **To Clipboard** button to copy the information in the text box: the user ID and password and a link to the installation program. This information can be copied into an email and sent to the user.



14. Click **Finish**. If you are creating a new Staff for the user, see Create a Staff.

Create a Staff for a new user account

When you create a user account using the New User Wizard, you are prompted to choose whether to assign the new user an existing Staff or to create a new Staff for the user. If you choose to create a new Staff, the Staff wizard opens automatically after you click **Finish** on the New User wizard.

1. If the New Staff wizard is not already open, do the following to open it now:
 - a. Click the **Database** menu and then click **Staff**.
 - b. On the Staff list, click the **Add** button.
2. On the Introduction screen, enter the first, last, middle name, and initials of the Staff.

Note

If the New Staff wizard opened automatically after you created a new user, some fields will be completed automatically based on information you entered on the New User wizard.

New Staff

Create a New Staff - Introduction

The Staff Wizard will quickly guide you through the process of creating a new staff.

Steps

- Introduction
- Address
- Custom
- Billing
- Finish

A Staff is a person or a resource (e.g., conference room/other) for which you maintain a calendar and/or assign records.

Enter the name and unique initials (2-4 characters) for this person/resource. The unique identifier will be used throughout the application for identification.

Last: Campos
First: Marilyn
Middle: C
Initials of this person or resource: MCC

☐ Do not use this wizard again.

[< Back](#) [Next >](#) [Cancel](#)

3. Click **Next** to continue to the Address/Phone Numbers page.
4. Enter the address and phone numbers of the Staff.

The screenshot shows a software window titled "New Staff" with a standard Windows-style title bar (minimize, maximize, close buttons). The main content area has a header "Create a New Staff - Address/Phone Numbers" and a sub-header "Enter an address and phone numbers for this staff." In the top right corner, there is a small graphic of a staff ID badge with a photo and the name "Chloe, Lorem I.". On the left side, there is a "Steps" panel with a vertical list of steps: "Introduction" (unselected), "Address" (selected with a red square), "Custom" (unselected), "Billing" (unselected), and "Finish" (unselected). The main area contains several text input fields: three for "Address" (split into three lines), one for "Home", one for "Mobile", and one for "Beeper". At the bottom right, there is a checkbox labeled "Do not use this wizard again." and at the bottom center, there are three buttons: "Back", "Next" (highlighted with a blue border), and "Cancel".

5. Click **Next** to continue to the Custom page.
6. Optionally, enter information about the Staff in the **Billing**, **Bar No**, and **Position** boxes.
7. If you want to specify a color for this Staff's records, click the **Color** button. The Select Color screen opens. Select a color and click **OK**. Records assigned to this Staff will appear in the selected color on lists and calendars.

The screenshot shows a software window titled "New Staff" with a standard Windows-style title bar (minimize, maximize, close buttons). The main content area is titled "Create a New Staff - Custom" and includes the instruction "Enter the custom data for this staff." In the top right corner, there is a small graphic of a staff member's ID badge. On the left side, a "Steps" panel shows a vertical list of steps: "Introduction", "Address", "Custom" (which is highlighted with a red square), "Billing", and "Finish". The main area contains three text input fields labeled "Billing", "Bar No", and "Position". Below these fields is a checkbox labeled "Notify Field is initially set to Yes on New Records". Further down, there is a label "Records will be colored as shown..." followed by the text "Staff Records Color" in a bold, dark blue font, and a "Color" button. At the bottom right of the main area is a checkbox labeled "Do not use this wizard again.". The bottom of the window features three buttons: "Back", "Next" (which is highlighted with a blue border and arrow), and "Cancel".

8. Click **Next** to continue to the Billing page.
9. Select a rate type. If you select a rate table, select the table from the drop-down list and a default level. If you select an hourly rate, enter the rate amount.
10. Optionally, select a matching Timeslips timekeeper and default payroll earnings item.

The screenshot shows a software window titled "New Staff" with a subtitle "Create a New Staff - Billing Options". The instruction "Complete the billing information for this staff." is displayed. In the top right corner, there is a placeholder for a staff member's photo and name, showing "Chloe, Loren L.". On the left side, a "Steps" panel shows a vertical list of steps: Introduction, Address, Custom, Billing (highlighted with a red square), and Finish. The main area contains two radio button options for "Rate Type": "Use Rate Table" (selected) and "Hourly Rate". Under "Use Rate Table", there is a "Rate Table" dropdown menu showing "<Custom Rate>" and a "Define" button. Below this is a "Default Level" spinner set to "0". Under "Hourly Rate", there is an "Amount" spinner set to "\$0.00". At the bottom right, there is a checkbox labeled "Do not use this wizard again." which is currently unchecked. At the bottom of the window are three buttons: "Back", "Next" (highlighted with a blue border), and "Cancel".

11. Click **Next** to continue to the Finish page.
12. Click **Finish** to close the wizard.

Configure security for a new user

When you create a user account using the New User Wizard, you are prompted to choose whether to create individual security settings for the new user or to use the settings from a security profile or another user. If you choose to create individual security settings, the Security Setup wizard opens automatically after you click **Finish** on the New User wizard. (The Staff wizard opens first, if you are also creating a Staff for the new user.)

1. Review the information on the Introduction page.
2. Click **Next** to continue to the Setup Settings page.
3. Select **Yes** below each program setup feature the user should have access to.

Security Setup - Setup Settings
Set the security settings and options used to setup the application.

Steps

- Introduction
- Setup**
- General
- Billing
- Reports
- Records
- Finish

User has access to Program Level, User Level, Workstation Level, and Security Settings?

☒ Yes ☐ No

User has access to setup codes (i.e., Autotxt, Billing, Classification, Phase, and Relationship)?

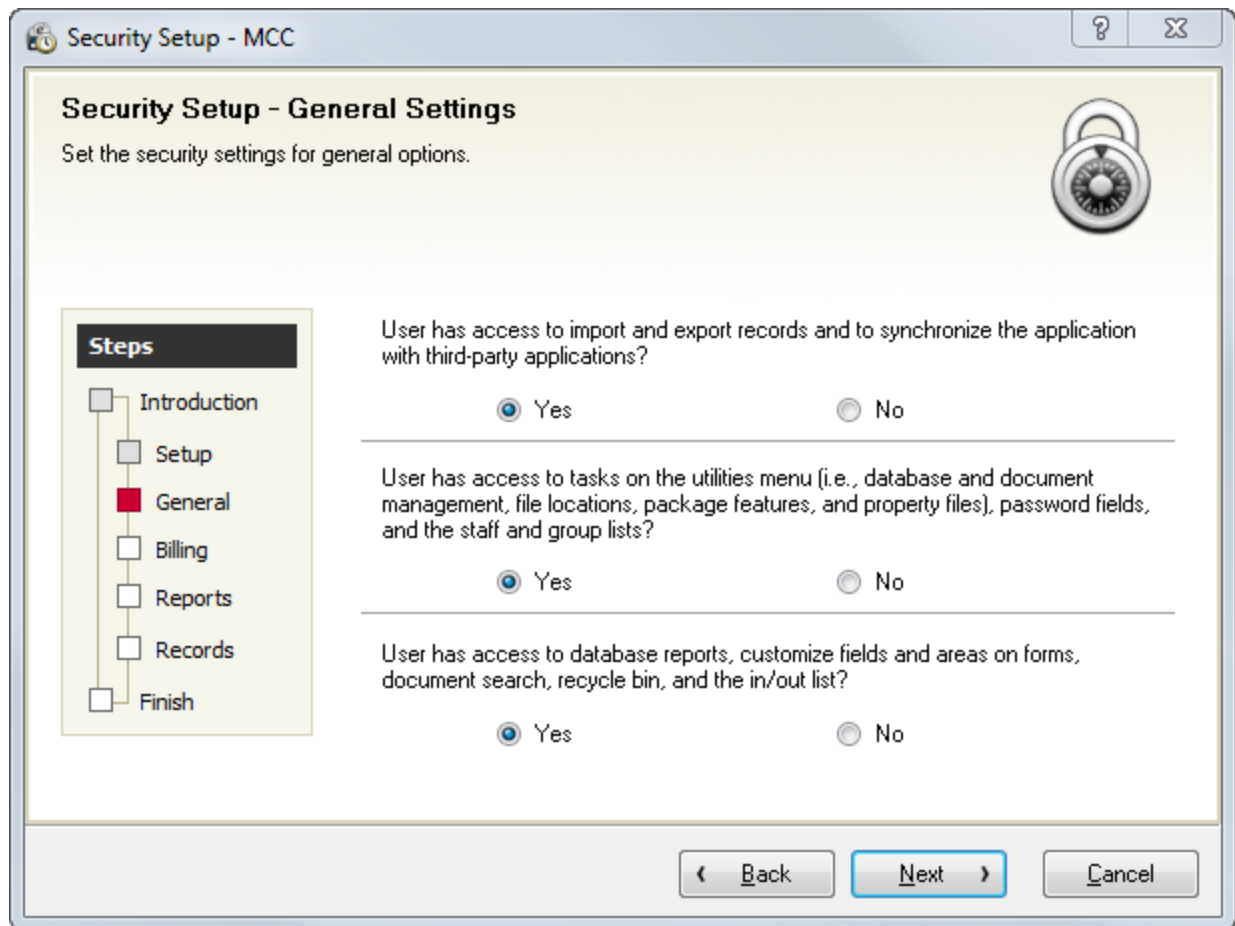
☒ Yes ☐ No

User has access to setup templates for AutoEntry Forms, Billing Preferences, Chains, HotDocs, Merges, Monitors, Triggers, and Navigators?

☒ Yes ☐ No

[Back](#) [Next](#) [Cancel](#)

4. Click **Next** to continue to the General Settings page.
5. Select **Yes** below each general program feature the user should have access to.



6. Click **Next** to continue to the Billing Settings page.
7. Select **Yes** below each billing feature the user should have access to.

Security Setup - MCC

Security Setup - Billing Settings
Set the security settings for billing-related tasks.

Steps

- Introduction
- Setup
- General
- Billing**
- Reports
- Records
- Finish

User has access to setup billing (i.e., bank accounts, rate tables, bill layouts and profiles, bill cycles, and payment terms)?

☒ Yes ☐ No

User has access to billing tasks (i.e., creating bills and pre-bills, posting bills, BillFlow Manager, and billing preferences)?

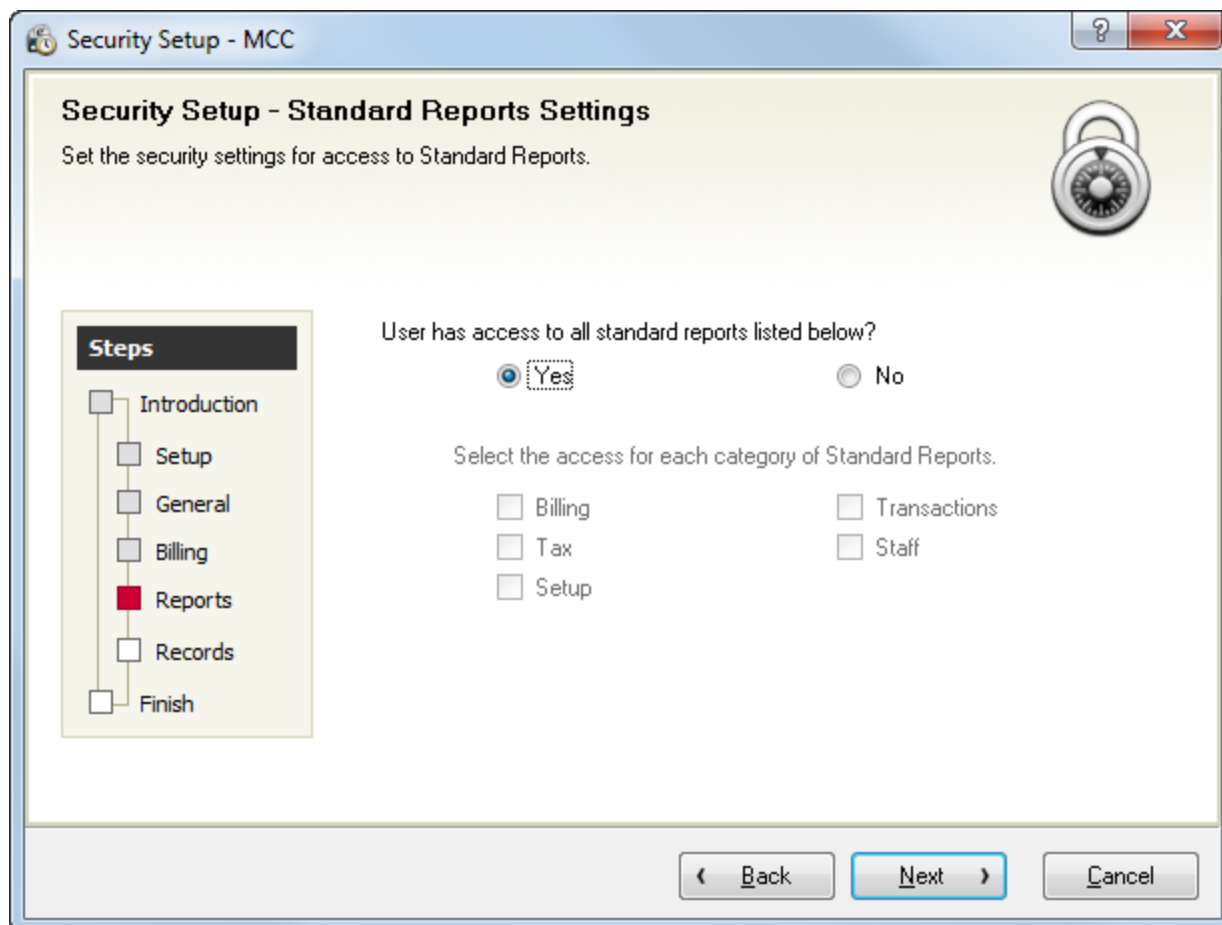
☒ Yes ☐ No

User has access to transactions and invoices (i.e., adding, changing, deleting, and the Accounts Receivable tab on forms)?

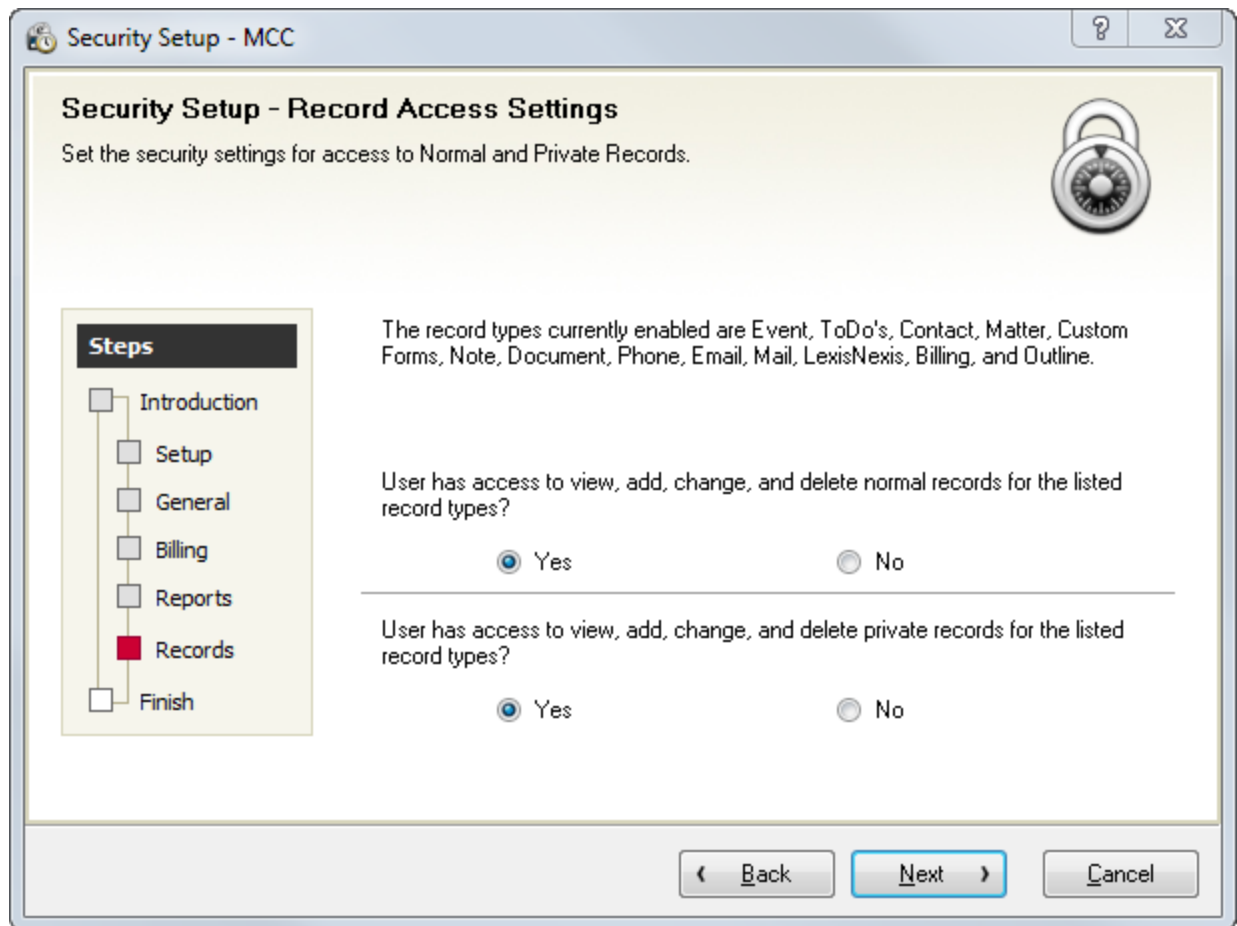
☒ Yes ☐ No

Back **Next** **Cancel**

8. Click **Next** to continue to the Standard Reports Settings page.
9. Select **Yes** to give the user access to all standard reports, or select **No** to select specific reports the user can access (or none).



10. Click **Next** to continue to the Record Access Settings page.
11. Select **Yes** below each type of record ("normal" or "private" records) the user should have access to.



12. Click **Next** to continue to the Finish page.
13. Click **Finish** to close the wizard.

Backup Time Matters data

After installing the software, you should perform an initial backup, and also establish a schedule for making regular backups.

It is recommended that you schedule backups to occur automatically on a regular basis. You can also perform backups manually as needed, such as before upgrading the software.

There are different kinds of data involved in a backup:

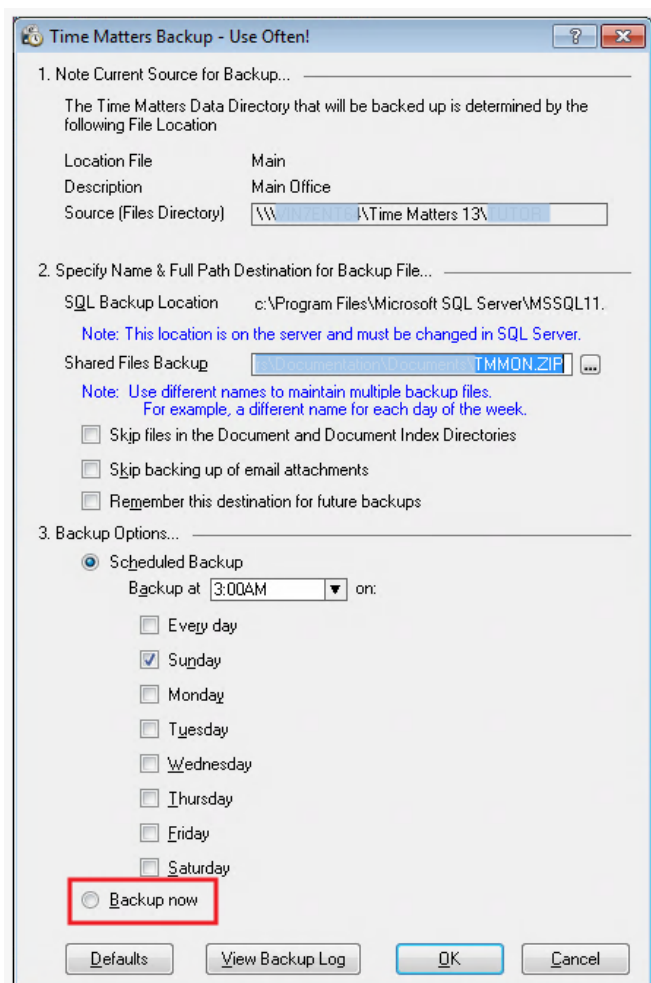
- Data in the SQL database
- Files in the Shared Files folder
- Email attachments

Create a manual backup in Time Matters

To start a manual backup:

1. Select **File > Backup Time Matters Data** from the Time Matters menu.

The Time Matters Backup window opens.



Time Matters Backup - Use Often!

1. Note Current Source for Backup...

The Time Matters Data Directory that will be backed up is determined by the following File Location

Location File	Main
Description	Main Office
Source (Files Directory)	\\Time Matters 13\

2. Specify Name & Full Path Destination for Backup File...

SQL Backup Location c:\Program Files\Microsoft SQL Server\MSSQL11.

Note: This location is on the server and must be changed in SQL Server.

Shared Files Backup TMMON.ZIP

Note: Use different names to maintain multiple backup files.
For example, a different name for each day of the week.

☐ Skip files in the Document and Document Index Directories

☐ Skip backing up of email attachments

☐ Remember this destination for future backups

3. Backup Options...

☒ Scheduled Backup

Backup at 3:00AM on:

☐ Every day

☒ Sunday

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

☒ Backup now

Defaults View Backup Log OK Cancel

2. (Optional) In the **Shared Files Backup** box, type or select a different backup file name.
3. (Optional) Select the types of files (documents and/or email attachments) that you want the backup to *skip*.
4. Select the **Backup now** option from the Backup Options... area.
5. Click **OK**.

The Begin Server Backup Now window opens.

6. Click **Yes**. When the SQL database backup is complete, the Server Backup Completed window opens.
7. Click **OK**.

The Begin Backup Now window opens.

8. Click **Yes**.
9. When the process is complete, click **OK** to close the window.

Note

Time Matters SQL database backups are stored in a different location than backups of Time Matters document and email files. The default location of SQL backup data is:

C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup **or** C:\Program Files (x86)\Microsoft SQL Server\MSSQL.1\MSSQL\Backup

Create a scheduled backup in Time Matters

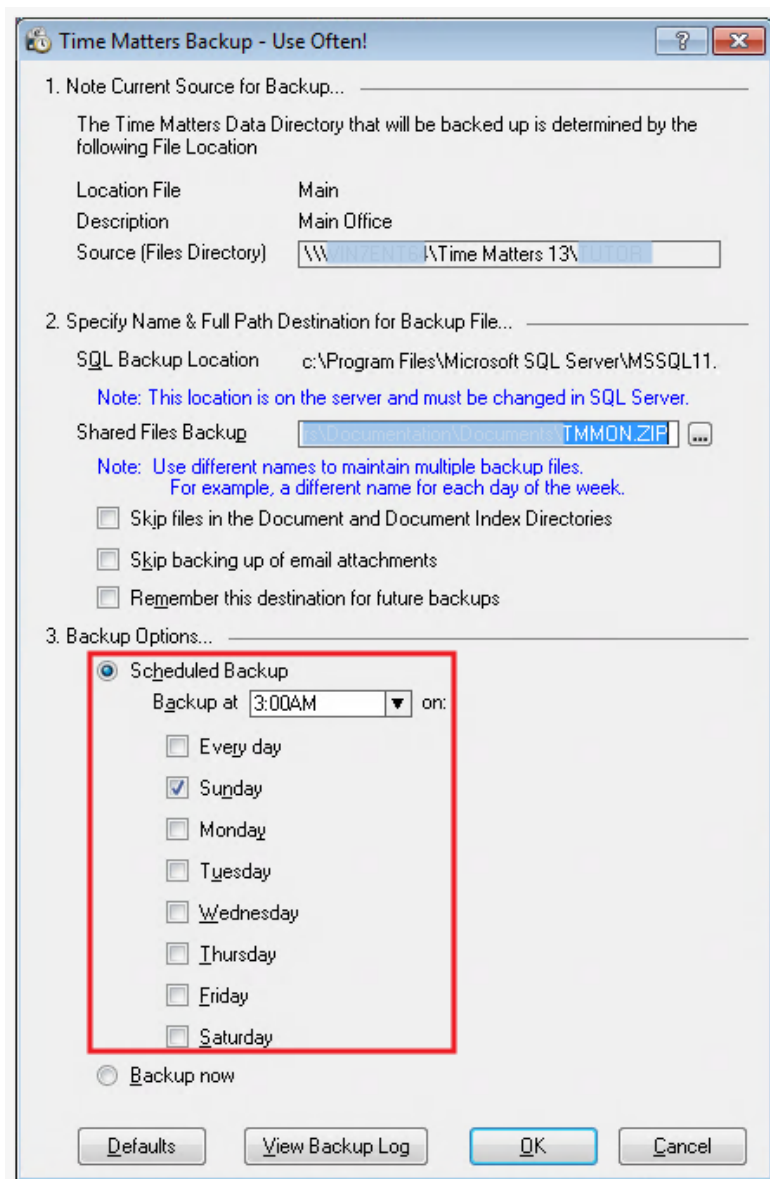
To create a scheduled backup in Time Matters:

Note

You must run Time Matters as an "Administrator" in order to schedule a backup.

1. Select **File > Backup Time Matters Data** from the Time Matters menu.

The Time Matters Backup window opens.



2. In the **Shared Files Backup** box, type or select a backup file name.

3. (Optional) Select the types of files (documents and email attachments) that you want the backup to *skip*.
4. Select **Scheduled Backup** from the Backup Options... area.
5. In the **Backup at** box, select the time you want the automated backup to run.
6. Check the box(es) that corresponds with the day(s) you want this backup to run.
7. Click **OK**.

The backup automatically starts on the day and time you selected for the schedule.

Note

The machine must be powered on (turned on) in order for the scheduled backup to run.

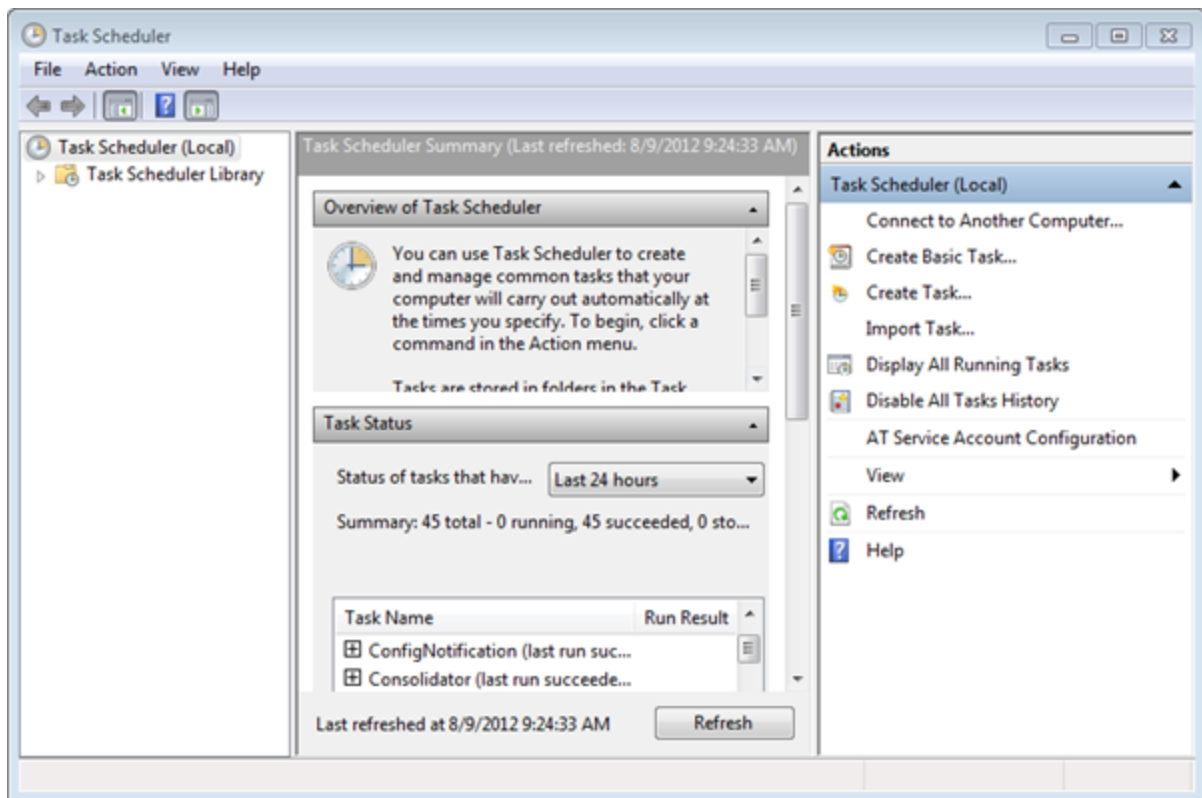
Additional scheduled backups

The Backup utility in Time Matters stores one scheduled backup configuration. If you need to create additional backup schedules, such as scheduling backups to occur at different times on different days, you can use the Windows Task Scheduler.

To create additional scheduled backups in Windows Vista, Windows 7, or Windows 8:

1. Click the Windows **Start** button.
2. Select **Control Panel > Administrative Tools > Task Scheduler**.

The Task Scheduler opens.



3. On the main menu, click **Action > Create Basic Task**.

The Create Basic Task wizard opens.

The screenshot shows the 'Create Basic Task Wizard' dialog box. The title bar reads 'Create Basic Task Wizard'. The main area has a left sidebar with 'Create a Basic Task' selected, and 'Trigger', 'Action', and 'Finish' listed below it. The main content area contains the text: 'Use this wizard to quickly schedule a common task. For more advanced options or settings such as multiple task actions or triggers, use the Create Task command in the Actions pane.' Below this text are two input fields: 'Name:' with the value 'Time Matters backup' and 'Description:' with the value 'Daily unattended database backup'. At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

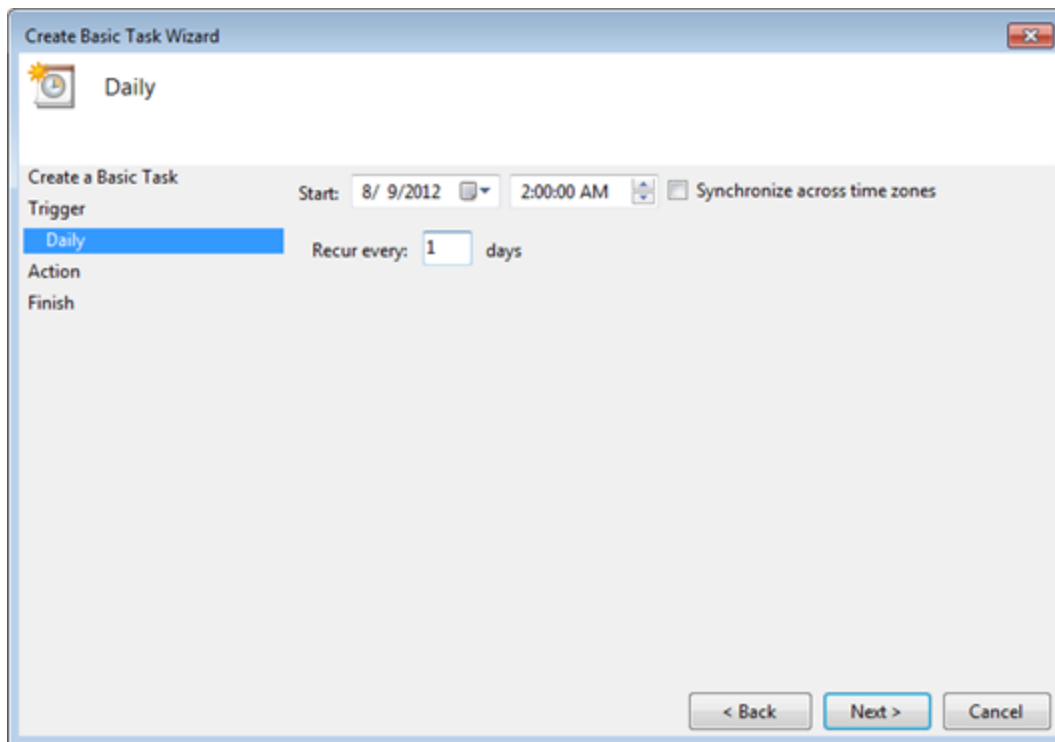
4. Enter a task name and a brief description. Click **Next**.

The Task Trigger page opens.

The screenshot shows the 'Create Basic Task Wizard' dialog box, Step 2: 'Task Trigger'. The title bar reads 'Create Basic Task Wizard'. The left sidebar now has 'Task Trigger' selected. The main content area contains the text: 'When do you want the task to start?'. Below this text are seven radio button options: 'Daily' (selected), 'Weekly', 'Monthly', 'One time', 'When the computer starts', 'When I log on', and 'When a specific event is logged'. At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

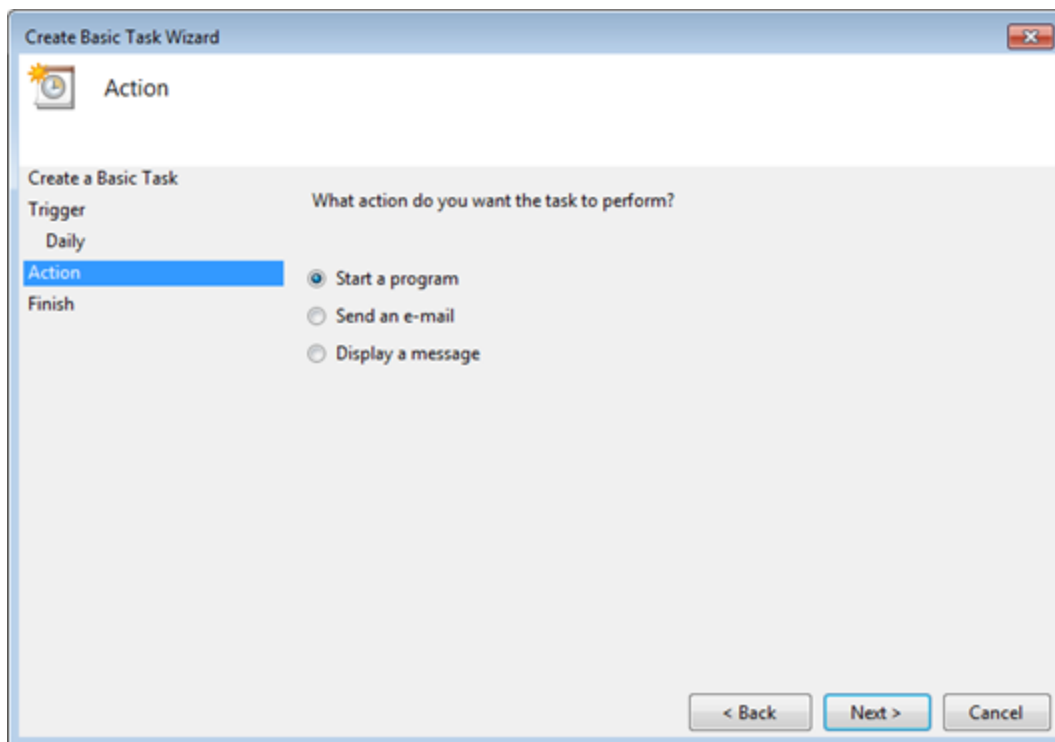
5. Select **Daily** and click **Next**.

The Daily page opens.



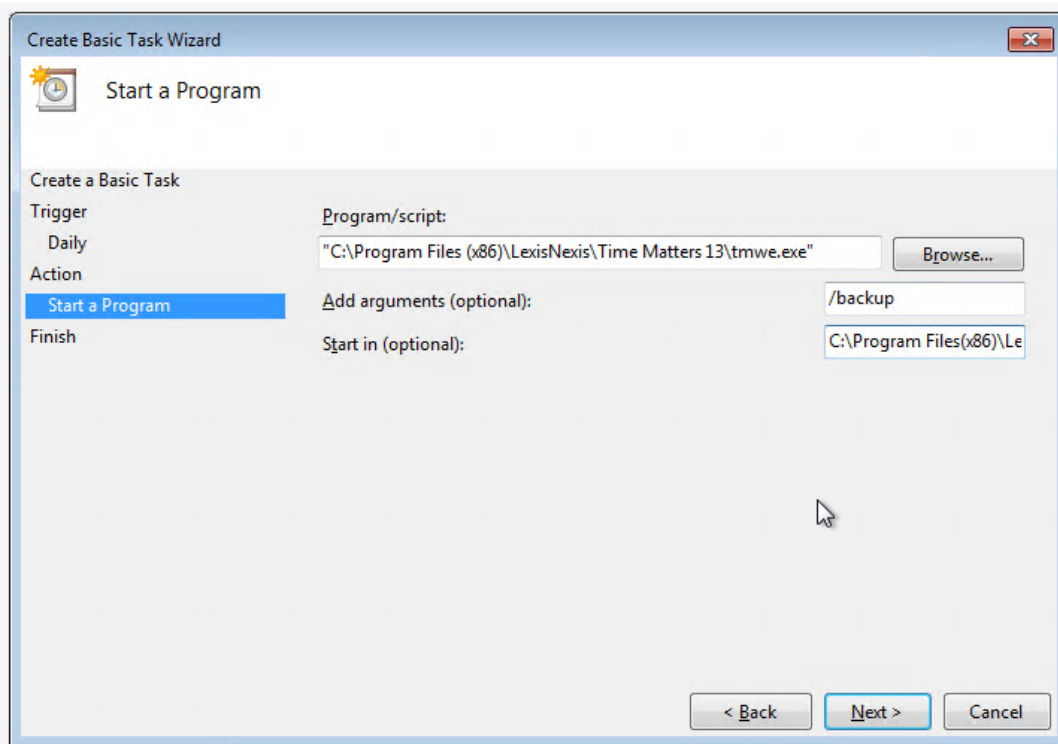
6. Select a date and time that the backup processes will begin. Click **Next**.

The Action screen opens.



7. Select **Start a program** under the "What action do you want to take?" heading. Click **Next**.

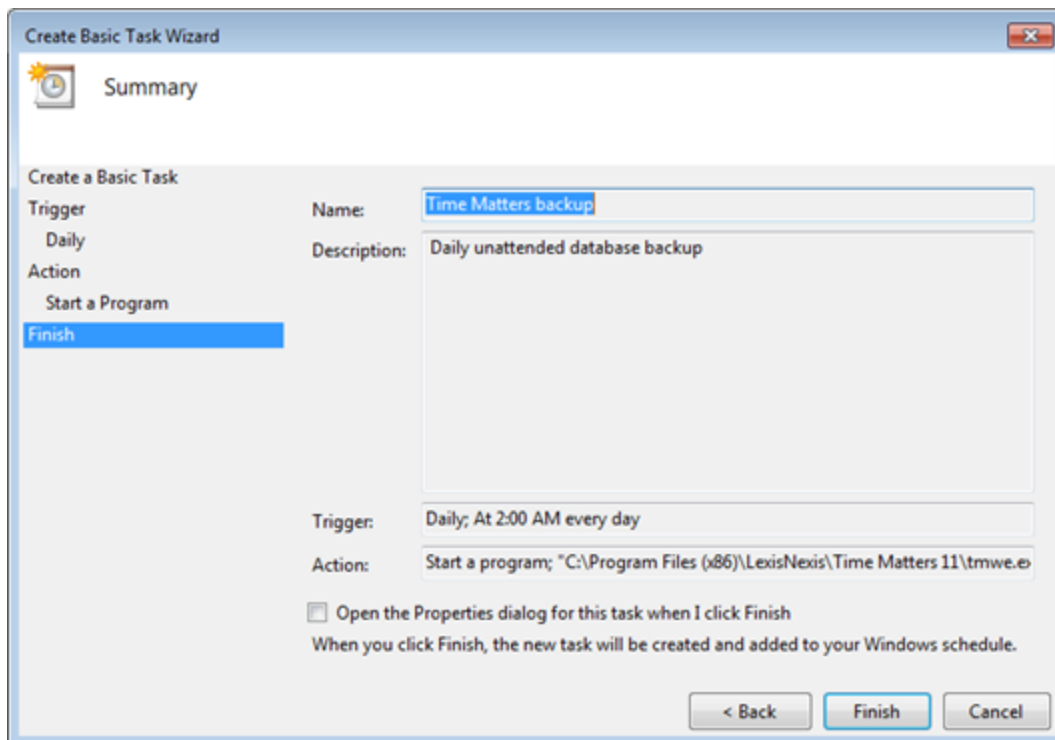
The Start a Program screen opens.



8. Click **Browse**.

The Open Dialog screen opens.

9. Select **Program Files > LexisNexis > Time Matters > TMWE.exe**.
10. Enter /backup in the **Add Arguments** field.
11. Enter the path to the program files (for example, C:\Program Files(x86)\LexisNexis\Time Matters) in the **Start in** field.
12. Click **Next**.



13. Click **Finish**.

Note

Please ensure that all Time Matters applications are closed prior to this scheduled task being executed. The backup will not run with the application open.

Notes

- If default backup file names are used, each Shared Files backup that occurs on a particular day of the week overwrites the file created by the previous backup on the same day. For example, a Shared Files backup file created on Monday (TMMON.zip) would be overwritten by a backup created the following Monday unless a different file name is specified.
- Each SQL backup is given a file name based on the day of the week when the backup is created. (Examples: AutomatedBackupMonday.bak, AutomatedBackupTuesday.bak, etc.) Thus, the next time a SQL backup occurs on the same day of the week as a previous backup, the previous backup file is overwritten by a new one with the same file name.
- You can view a log of previous backup attempts by clicking the **View Backup Log** button at the bottom of the Time Matters Backup window.
- You can also run the backup process from the command line by using the main Time Matters executable (tmwe.exe) with the /backup parameter and other parameters listed below.

Command-line parameter	Description
/backup	A full backup (emails, attachments, and documents) is performed
/backup /noemail	A backup not including email attachments is performed
/backup /nodoc	A backup not including documents and files is performed
/backup /nosql	A full backup is performed, but does not include SQL back up activities
/backup /noemail /nodoc	A database backup only is performed
/backup /U=xxxx	Allows you to identify which database is backed up, where xxxx is the name of the configuration file.
/backup /zipdest=xxxx	Allows you to use a custom description/file name, where xxxx is the name of the file, to a maximum of 80 characters.

Set up Mobility

Setting up Mobility requires you to do the following:

1. Ensure that your firm has an active Annual Maintenance Plan (AMP).
2. Install the Mobility Manager (setup.exe) on the server that hosts your Time Matters or Billing Matters database.
3. Ensure that **Enable Web Access** is selected on the General tab of Program Level Setup (the option is selected by default).
4. Ensure the following for each user who will use Mobility:
 - The **Mobility User** check box is selected on the User Form. (This check box is also present on the New User wizard when you create new user accounts.)
 - An email address is entered on the User Form. This will be entered as the User ID when logging in to the Mobility web site.
 - The user's password meets strong password requirements. (Users without a strong password will be prompted to change their password the first time they attempt to log in to the Mobility web site.)

Note

Please allow 15 minutes for new Mobility users to become active after enabling Mobility for each user.

5. Provide users with the Mobility URL: <https://tmmobility.lexisnexis.com>

Install the client application

In order to install the Time Matters or Billing Matters client application on a user's computer, you will need to run the setup program that was created when you installed the database on your server. This setup program is pre-configured with your product key and the location of the database and shared files, so you will not have to enter that information during installation. The setup program is located in a sub-folder inside your Time Matters/Billing Matters shared files folder:

<sharedFilesFolder>/Setup/setupe.exe

Warning

Performing a workstation install on a user's computer with the setup program used for the initial installation on the server computer is not allowed. The installer will direct you to use the setup program from the shared files directory.

1. Run the setup program setupe.exe in the /Setup subfolder of your Time Matters/Billing Matters shared files folder. Your systems administrator can provide the location if needed.
2. If the **Product Key** boxes are not already completed, enter your product key.
3. Click **Next** to continue to the Software Agreement page.
4. Review the software agreement. When you are finished, select **I accept the terms in the software agreement**.
5. Click **Next** to continue to the Installation Type page.
6. Select **Complete** if you want to install all program features, or select **Custom** if you want to choose the features that are installed.
7. Click **Next** to continue.
8. Perform the following additional steps only if you selected **Custom** on the Installation Type page.
 - a. Optionally, click the **Change** button to select a different local folder in which to install the application.
 - b. Click **Next** to continue.
 - c. Optionally, deselect program features that you do not want to install. To deselect a feature, click the icon beside that feature and select the option "<feature> will not be installed."
 - d. Click **Next** to continue to the Ready to Install page.
9. Review the installation settings. If you need to change settings, click the **Back** button to return to previous pages of the wizard.
10. Click **Install** to begin the installation. Wait for the installation process to complete.
11. Click **Finish** to close the installation wizard, when the client application has been installed, the Installation Complete page opens.

Disable Protected Mode in Adobe Reader

For the Time Matters plug-in to function, you must disable Protected Mode in Adobe Reader.

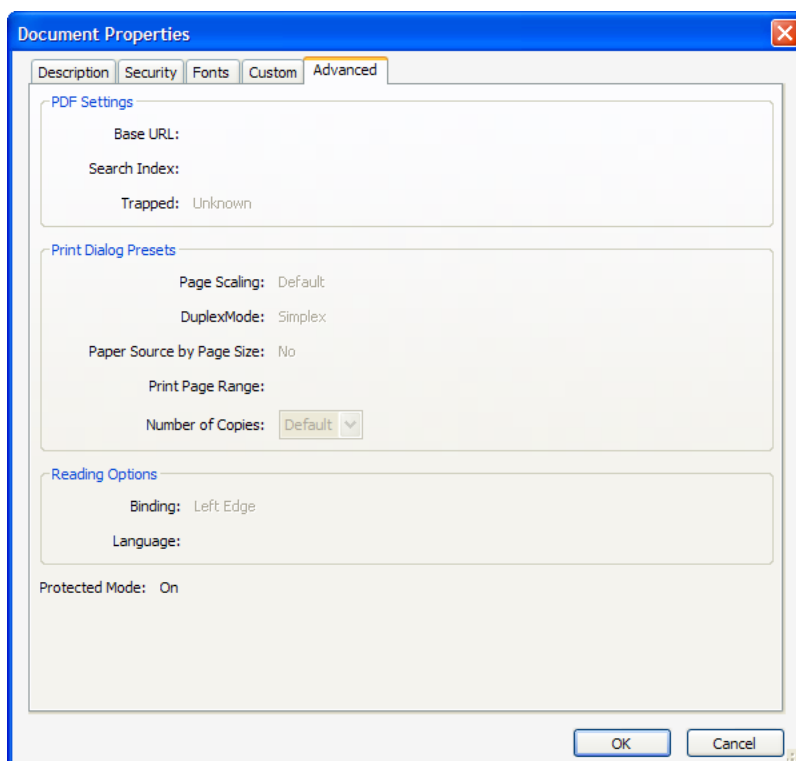
Protected Mode is a feature of Adobe Reader X and later versions. Use the following links to view instructions for your version of Adobe Reader:

- [Adobe Reader X](#)
- [Adobe Reader XI](#)

Check the status of Protected Mode:

1. Open a document in Adobe Reader.
2. On the **File** menu, click **Properties**.

The Document Properties window opens.



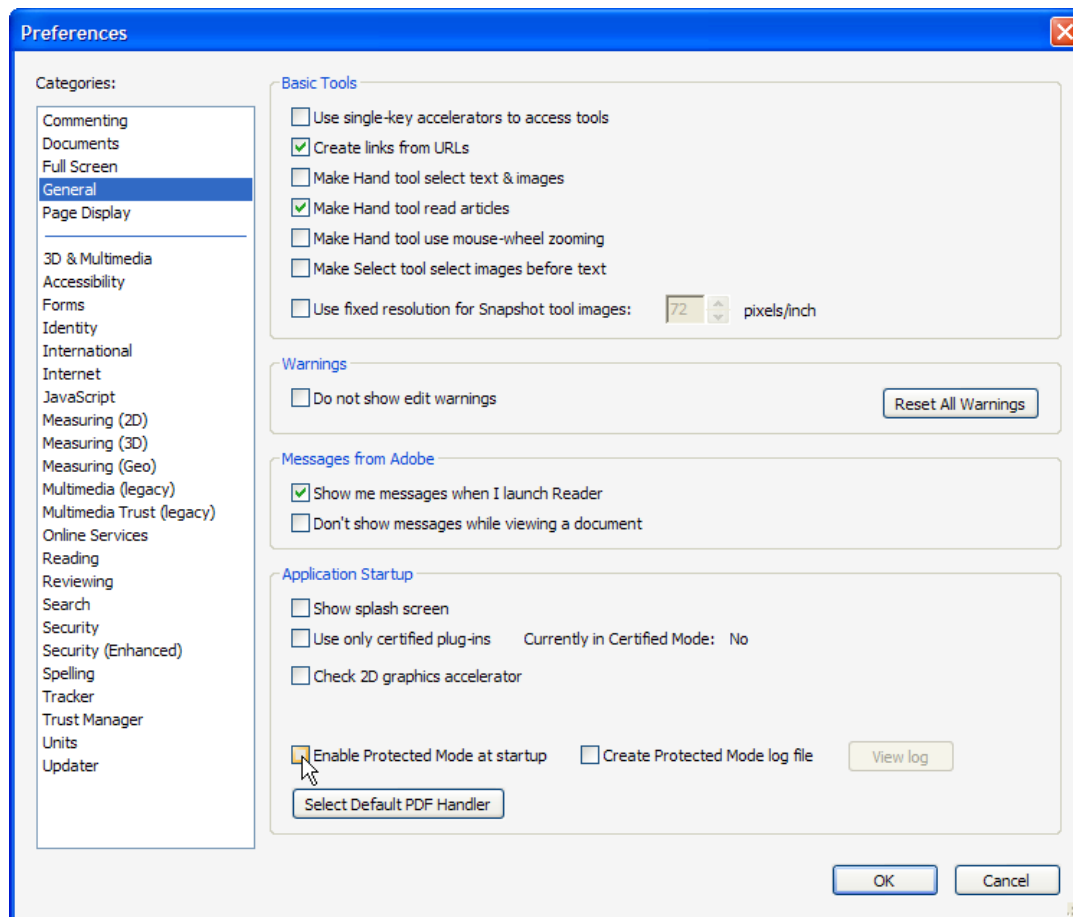
3. On the **Advanced** tab, check the **Protected Mode** property.

Adobe Reader X

Turn off Protected Mode in Adobe Reader X:

1. On the **Edit** menu, click **Preferences**.

The Preferences window opens.



2. In the **Categories** list on the left, select **General**.
3. In the Application Startup area, clear the check box **Enable Protected Mode at startup**.
4. Click **OK**.

For more information, see the Adobe website:

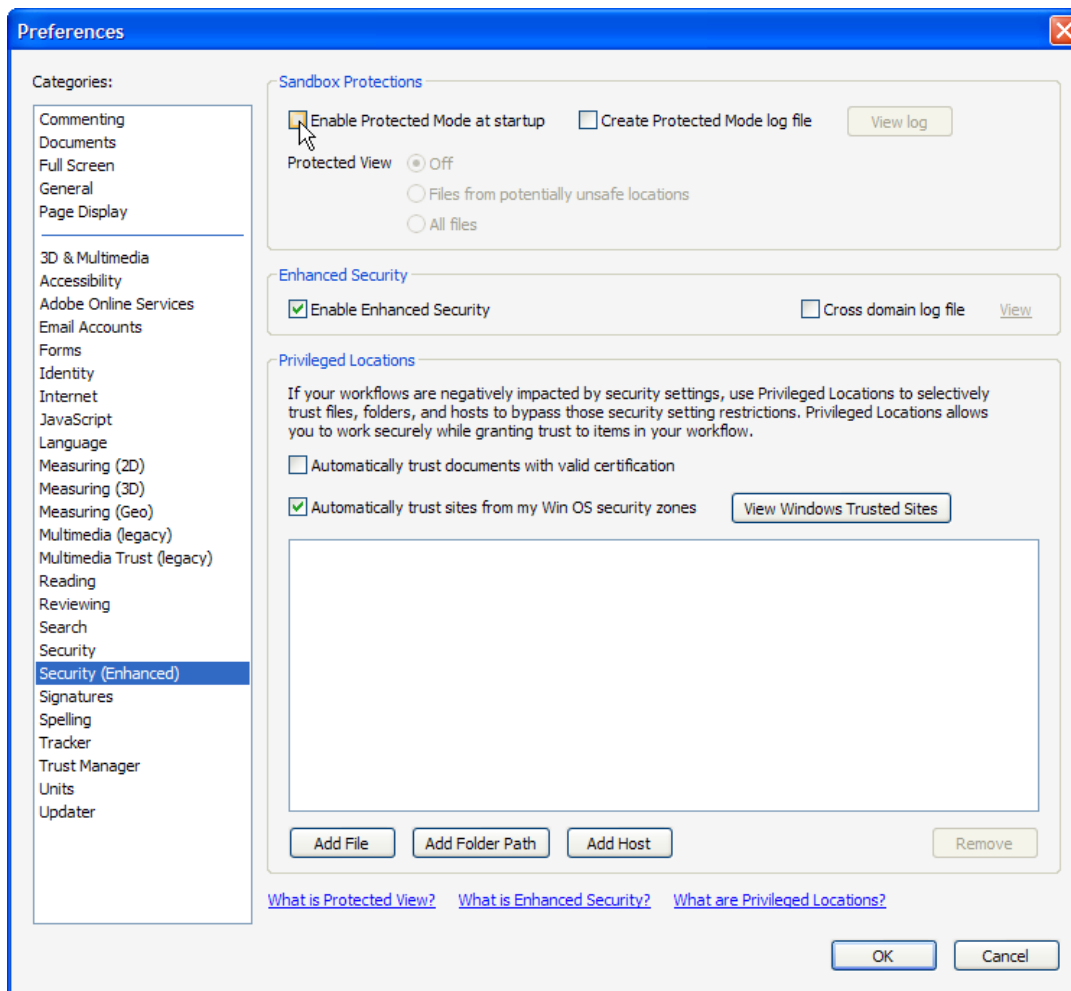
http://help.adobe.com/en_US/reader/using/WS4bebcd66a74275c3-7d28390112a81b3ebff-8000.html

Adobe Reader XI

Turn off Protected Mode in Adobe Reader XI:

1. On the **Edit** menu, click **Preferences**.

The Preferences window opens.



2. In the **Categories** list on the left, select **Security (Enhanced)**.
3. In the Sandbox Protections area, clear the check box **Enable Protected Mode at startup**.
4. Click **OK**.

For more information, see the Adobe website:

<http://helpx.adobe.com/reader/using/protected-mode-windows.html>

Uninstall the software

Warning

If you currently have both Time Matters and Billing Matters and you only want to uninstall one of the applications, you must contact Customer Support to assist you. Do not use the following instructions for uninstalling, or it could result in loss of data.

Time Matters cannot be uninstalled without uninstalling Billing Matters, nor can Billing Matters be uninstalled without uninstalling Time Matters.

1. In Windows, go to **Start > Control Panel > Add or Remove Programs**.
2. In the list of installed programs, select **Time Matters 13**.
3. Click the **Uninstall** button.

At your option, you can manually delete the folder containing Time Matters/Billing Matters configuration files. If you plan to reinstall the software with a different configuration (such as installing the database on a different SQL Server), it is a good idea to delete this folder.

The folder's default location depends on your version of Microsoft Windows:

- Windows XP:

`C:\Documents and Settings\All Users\Application Data\LexisNexis\Time Matters`

- Windows Vista, Windows 7 and Windows 8:

`C:\ProgramData\LexisNexis\Time Matters`