

How to move a to-be-fixed document file from the wrong folder to the GOOD folder and correct the TM Document record

Overview

This guide explains how to fix a document that has been saved into the wrong folder when using Time Matters. The fix involves creating the correct folder, moving the file to the correct folder, and fixing the TM Document record.

These steps insure that the correct information in the Time Matters Document record is preserved, including the Record Date, File Date, Author and User fields. If the GOOD folder does not yet exist, Steps 1 and 2 insure that it is created correctly.

Before you begin, make sure that the Matter or Case record is fully completed for each of your to-be-fixed documents.

Do you **already have correct folders** for your to-be-fixed documents, but your documents are in the wrong folders? If so, you can **skip Steps 1 and 2** that create the correct folders if they don't exist yet.

Follow Steps 1 and 2 for each document that **needs a new, correct folder** matching its Matter or Case. If you're not sure the correct folder exists, go ahead with Steps 1 and 2 anyway. It won't be a problem either way.

These steps are faster than they might appear. Essentially you:

- **Create a GOOD folder if needed** (Steps 1 and 2),
- Open the to-be-fixed Document record and **cut the file from the wrong folder.**
- Navigate to the GOOD folder and **paste the file.**
- **Correct and Save** the Document record.

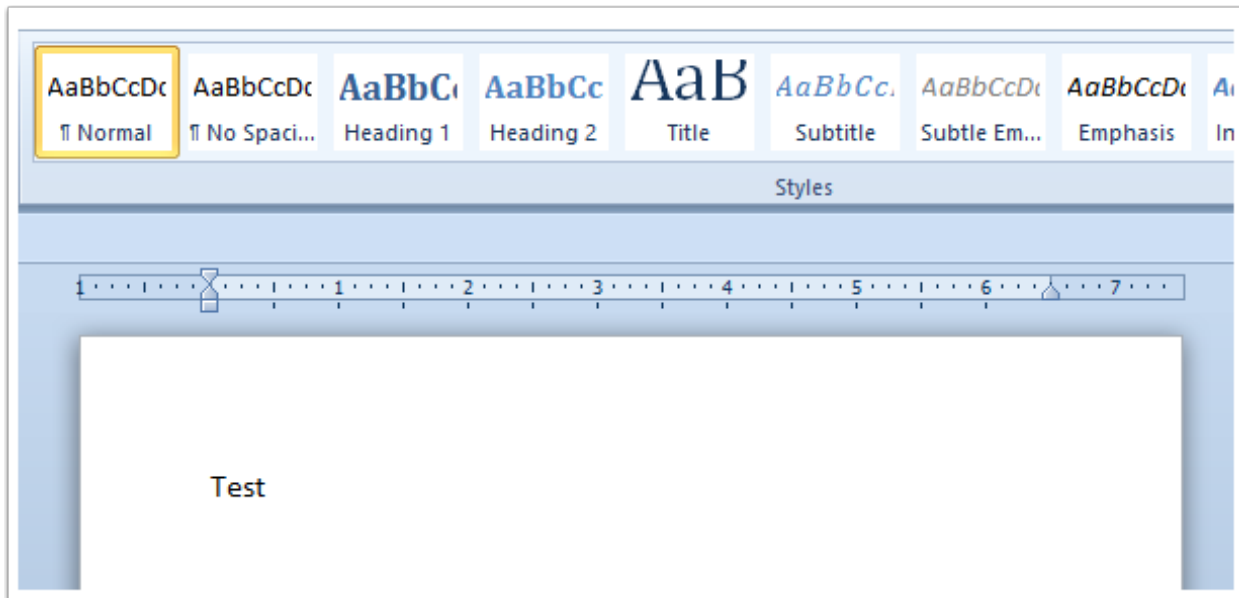
If you were to fix the Document file using some other set of steps, you would still have to perform all these actions. You always need the GOOD folder, the file must be moved, and the Document record must be corrected. Even with a dedicated custom program, you would still have to tell it what folder to create, where to put the document, and how to correct the Document record.

Step 1 - (Optional) Create a new Test document

Skip this Step 1 and Step 2 if you already have a GOOD folder for the document that is in the wrong folder.

In MS Word (or WordPerfect), create a new document. You can just type the word, "Test," in it.

This step is **not needed** if a GOOD folder already exists for your to-be-fixed Document.



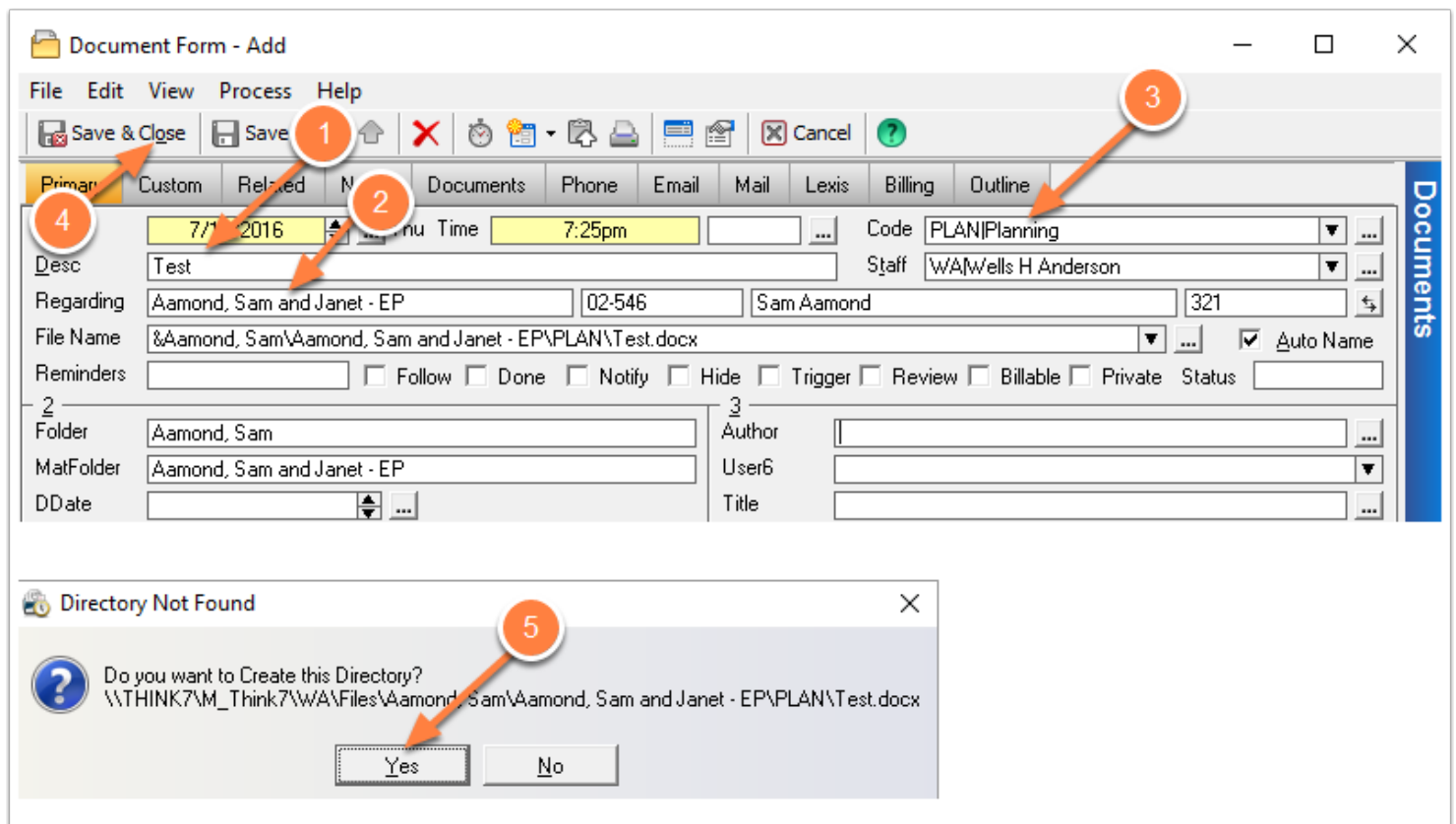
Step 2 - (Optional) Save the Test document

Use TM Save to save the Test document.

This step is **not needed** if a GOOD folder already exists for your to-be-fixed Document.

1. Enter the Description, "Test"
2. Choose the Matter or Case matching the Matter or Case for the to-be-fixed document.
3. If you use subfolders within the Matter folder, for example, subfolders named by Classification Codes, be sure to select a Classification Code for the Test document that matches the Classification Code of the to-be-fixed document.
4. Press **Save and Close**.
5. Click **Yes** to create the new, GOOD folder. If the message does not appear - no worries. You already have a good folder. Close the Test document in Word (or WordPerfect).

This step creates the new Matter Folder (and subfolder) automatically.



Step 3 - Open the to-be-fixed Document record

In **Time Matters**, open the Matter or Case

1. Double-click on the to-be-fixed Document record.

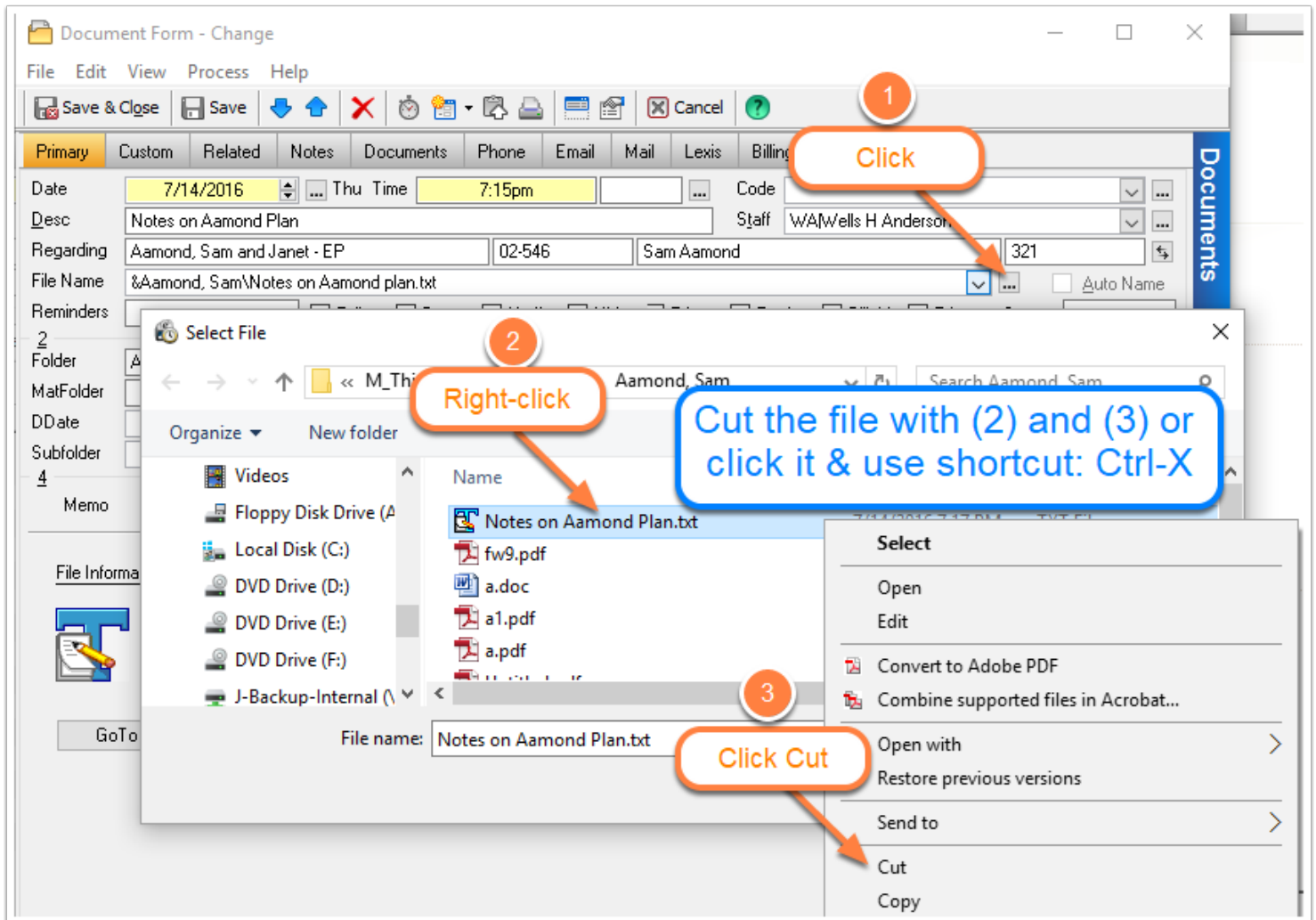
Notice in this example that the Document record is **missing a Code** and the Document file is in the **wrong folder**.

The screenshot shows the 'Matter Form - Change' window in Time Matters. The 'Docs' tab is active, displaying a list of document records. A red circle with the number '1' is placed over the first record in the list, with an arrow pointing to it and a callout box that says 'Double-click to Open'. The record has a date of 7/14/2016, a time of 7:15PM, and a description of 'Notes on Aamond Plan'. Below the list, the details for this record are shown. The 'Code' field is empty, with a callout box pointing to it that says 'Missing Code'. The 'File Name' field contains '&Aamond, Sam\Notes on Aamond plan.txt', with a callout box pointing to it that says 'Wrong Folder'. The 'Regarding' field shows 'Aamond, Sam and Janet - EP' and '02-546'. The 'Client' field shows 'Sam Aamond' and '321'. The 'Staff' field shows 'WAWells H Anderson'.

Date	Time	Sta...	Code	&De	MatRef	FileName
7/14/2016	Thu 7:15PM			Notes on Aamond Plan	Aamond, Sam an...	&Aamond, Sam\Notes on Aa
7/11/2016	Mon 7:25PM	PLAN		Test	Aamond, Sam an...	&Aamond, Sam\Aamond, Sa

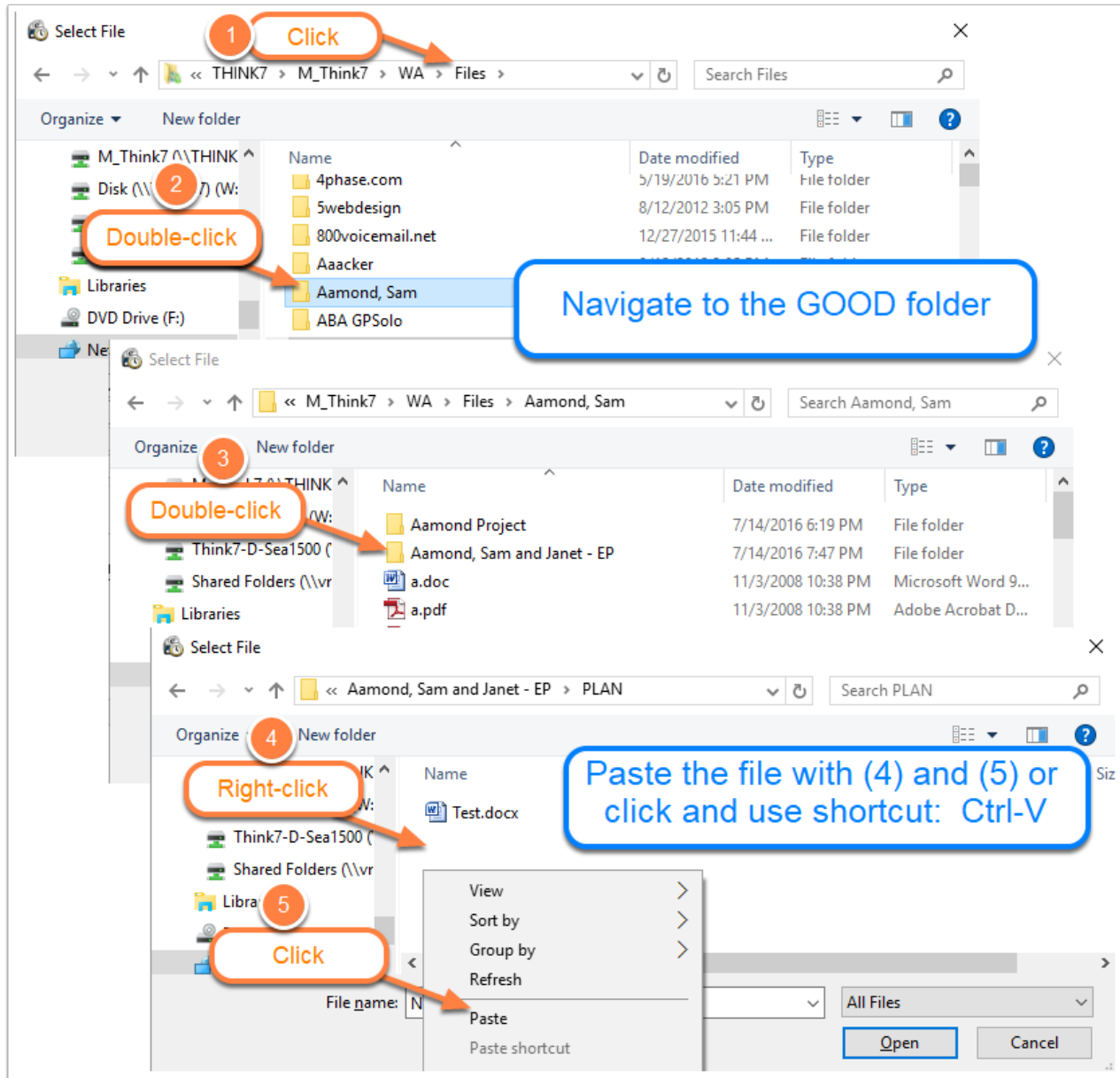
Step 4 - Find and Cut the to-be-fixed Document file

1. Click the **Lookup** button [...]
2. Find and **Right-click** the to-be-fixed Document file.
3. Click **Cut**



Step 5 - Go to the GOOD folder and Paste the Document file

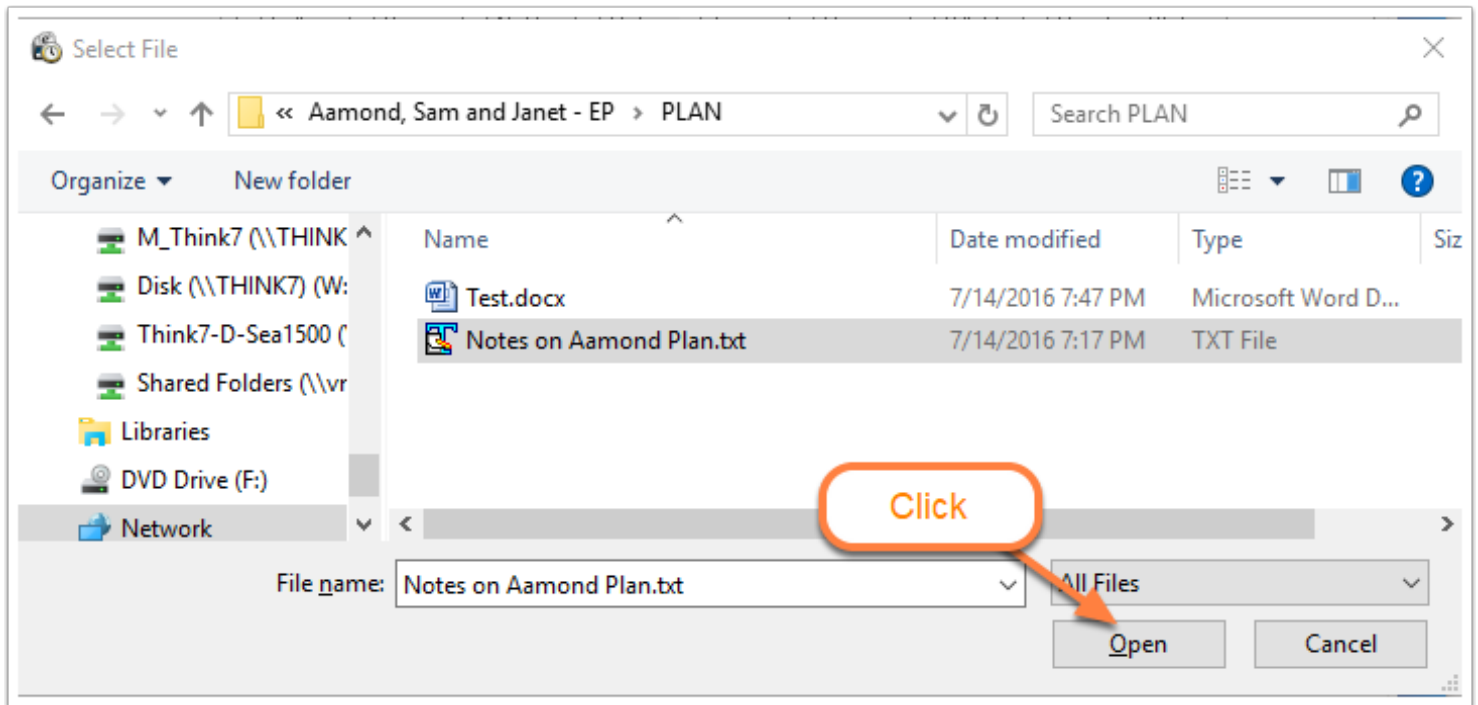
1. **Click** on the parent folder for your Document folder.
2. Begin **double-clicking** deeper into the folders where you will find the GOOD Document folder
3. **Double-click** the next deeper folder, etc.
4. **Right-click** in the white space of the GOOD folder. Notice that a Test document may be there.
5. **Paste** the Document file into the GOOD folder.



Step 6 - Click Open

With the Document file now in the GOOD folder and highlighted, click **Open**.

This step fixes the File Name in the Document record.



Step 7 - Correct and Save the Document record

If the Document is missing information, such as the **Code** or the correct **Matter or Case Name**, make the corrections:

1. Correct the **Code** if needed.
2. Correct the **Matter or Case Name** if needed.
3. **Save and Close** the Document record.

Note: The **File Name** field is correct but appears in all lower case. This change is not a problem.

The screenshot shows the 'Document Form - Change' window. The menu bar includes File, Edit, View, Process, and Help. The toolbar contains buttons for Save & Close, Save, and other actions. The form fields are as follows:

Date	7/14/2011	Thu	Time	7:15pm	Code	PLAN Planning
Desc	Notes on Aamond Plan				Staff	WA Wells H Anderson
Regarding	Aamond, Sam and Janet - EP	02-546	Sam Aamond		321	
File Name	&aamond, sam\&aamond, sam and janet - ep\plan\notes on aamond plan.txt					<input type="checkbox"/> Auto Name
Reminders	<input type="checkbox"/> Follow <input type="checkbox"/> Done <input type="checkbox"/> Notify <input type="checkbox"/> Hide <input type="checkbox"/> Trigger <input type="checkbox"/> Review <input type="checkbox"/> Billable <input type="checkbox"/> Private					Status

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