

FREE VERSION

SERVICE RELEASE 3A

INSTALLATION AND FEATURES GUIDE

TIME MATTERS 9.0

PRACTICE ADVANTAGE 9.0

*Expert Advice – Critical Fixes
Illustrated How-To's*

By

Wells H. Anderson, J.D.
Certified Independent Consultant

Wells Anderson has provided a one-stop guide to all you need to know about SR3A, blended with valuable advice. Great for Do-It-Yourself users or as a CIC resource. – Arita Sims, Certified Independent Consultant

Great product! – Mark J. Fellman, J.D., practicing attorney with 25 years' experience – Named by Super Lawyers Magazine

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Navigating this Guide

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Return to Table of Contents

Press **Home** key and then **Page Down** key to return to Table of Contents.

Page Down and Page Up Keys

The Page Down and Page Up keys move one screen at a time.

Forward one page: Press **Ctrl-Page Down**

Back one page: Press **Ctrl-Page Up**

Clickable Links

Clickable links also appear throughout the e-book enabling you to jump directly to Web sites and to related sections within the guide.

Terminology

Time Matters and LexisNexis Total Practice Advantage (referred to as "Practice Advantage" or "LNTPA") share much of the same code base. References to Time Matters and TM apply equally to LNTPA.

"Version 9.0" refers to Time Matters, Billing Matters and LNTPA.

"Service Releases" refer to Version 9.0 SR3A and Version 8.0 SR2D.

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Is this Guide for You?

If you depend on Version 8.0 or 9.0 of Time Matters, Billing Matters, or Practice Advantage, **Service Release 3A is critically important**. This new release adds features and fixes that can prevent and fix serious problems.

This guide gives you **expert advice, undocumented tips** and **detailed, illustrated instructions**. It goes far beyond the installation instructions available from LexisNexis. This guide will help you **avoid headaches** caused by **lost information** and **out-of-date records** in both Version 8.0 and 9.0. It shows you how to **fix and prevent Attachment Bloat** in Version 9.0.

SR3A also improves and extends many existing features including Conflicts Searches, Global Searches, saving e-mail attachments, and linking MS Outlook e-mails to contacts and matters. I **strongly recommend** SR3A for Version 9.0 and SR2D for Version 8.0.

For Beginners and Ordinary Users

This guide covers much material in depth, but it also summarizes all the important points. You will not need to read the entire guide to benefit from its basic advice and valuable instructions. The guide is useful if you work with a consultant or Technical Support to fix problems in your database. It gives you step-by-step instructions for your reference after you are off the phone.

For Current Users of Version 9.0

In addition to giving you a wealth of undocumented secrets and advice, this guide explains serious data problems that could exist in your database. It tells you how to find and fix existing data errors caused by issues now fixed by SR3A. These serious issues go back to the first release of Version 9.0.

For Upgraders to Version 9.0

Learn how to take advantage of SR3A's important new features. See how to fix Attachment Bloat and data problems existing in your 8.0 or earlier database. Understand how to use Time Matters 9.0 more effectively.

For Users of Versions 8.0, 7.0 or Earlier

If you are deciding whether or not to upgrade, this guide illustrates powerful new features missing from your current Time Matters software. Learn about the long list SR3A features from an expert.

If you are using or have used Version 8.0 Service Release 2C, 8.0 SR2A or an earlier release of 8.0, this guide explains a serious issue that could affect your records. Version 8.0 SR2D was released on 12/18/2008. It fixes the

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Updating Related Records issue in Version 8.0. This guide explains how to fix errors caused by that issue. See the section: [Updating Related Records](#). It tells you what you can do to fix your records if you were affected.

For Do-It-Yourselfers

As a certified LexisNexis consultant who works mainly with small firms and solos, I understand your need to keep expenses down. This guide is my effort to provide expert consulting advice economically and to allow you to do as much as you can on your own. If you need the assistance of a Certified Independent Consultant, this guide can reduce what you spend by explaining a variety of options and features. It prepares you to make the most of your time working with a consultant.

This guide packages a great deal of valuable advice not available in the Help files or from Technical Support.

For Consultants

The material in this guide goes much deeper than the instructions available from LexisNexis for consultants. It reflects my experience in using the Data Validation tool accessible only by Certified Independent Consultants and Technical Support. It offers advice on what problems to look for and step-by-step instructions on how you can work with your clients to fix them. This guide also gives you insights into the excellent new features added by SR3A with instructions on how to use them.

For more information on buying the Full Version, see: [About this Guide](#)

Pricing

SR3A Installation and Features Guide – Free Version	Free
SR3A Installation and Features Guide – Full Version	\$18

Buy the Full Version, click here;
<http://www.activepractice.com/SR3A-Guide>

Wells Anderson has provided a one-stop guide to all you need to know about SR3A, blended with valuable advice. Great for Do-It-Yourself users or as a CIC resource. – Arita Sims, Certified Independent Consultant

Great product! – Mark J. Fellman, J.D., practicing attorney with 25 years' experience – Named by Super Lawyers Magazine

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About this Guide

Free Version or Full Version of the Guide?

This guide is distributed as a PDF download. Anyone can open the Free Version and read it on any PC. It may be freely downloaded here:

<http://www.activepractice.com/sr3a-guide>

The Free Version includes:

- **Complete Table of Contents**
- **Introductory pages** about who can benefit and what is in the Guide
- **Selected pages** of useful advice and tips from the Full Version

The Full Version includes:

- **Illustrated, step-by-step instructions** on new features of SR3A and on how to install it.
- **Expert advice** on a new cure for **Attachment Bloat** that can destroy documents and e-mails
- **Top-level summaries** plus in-depth analysis of new features, including **undocumented tips** on running better **Conflicts Searches**
- **Advice** on how to fix records affected by the **Deleted Records Issue** and the **Updating Related Records Issue**.
- **Much more**, including tips, advice and screenshots

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Please visit the guide's Product Page:

<http://www.activepractice.com/sr3a-guide>

Help get out the word about this guide to other people who are interested in Time Matters and can benefit from learning about Service Release 3A.

Please tell other Time Matters users about this guide or E-mail them this link:

<http://www.activepractice.com/sr3a-guide>

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If for any reason you are dissatisfied with the e-mail, you may request a refund within 10 days of the download date. The [10-Day Return Privilege](#) and [30-Day Warranty](#) are subject to all the terms and restrictions posted on our Web site.

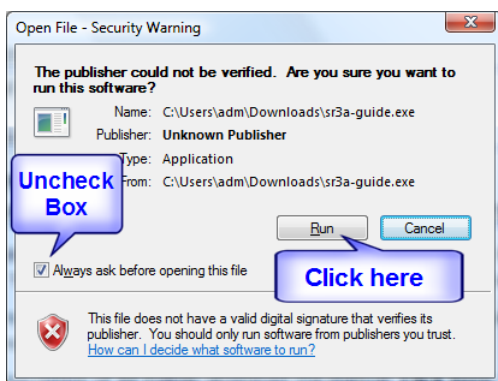
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<http://www.activepractice.com/products/sr3a-guide>

Summary of Service Release 3A

SUMMARY: New Features

Detailed descriptions and step-by-step instructions for SR3A's new features start on page 30, [SR3A New Features](#).

Eliminating E-mail Attachment Bloat

An important new feature in SR3A can eliminate Attachment Bloat, a condition that can cause loss of attachments, loss of e-mails, slow backups, slow performance and running out of database space.

Attachment Bloat is not caused by a bug in the program. It is caused by the accumulation of many e-mails with attachments that have never been deleted or saved as files and deleted from e-mail records. The old options for managing attachments are manual and time-consuming. Many users don't know about them or do not use them consistently.

Service Release 3A fixes Attachment Bloat in two ways:

1. A new option can store e-mails attachments automatically outside of the database as individual files; and
2. The Manage Email Attachment feature has been enhanced to allow you to move existing attachments outside of the database.

When the new feature in SR3A is activated, attachments are moved outside of the database but continue to appear in e-mails with no apparent change in how you work with them. [More...](#) on page 30

Faster Form Tabs (Enterprise Only)

If you have Matters or Clients with large numbers of Documents, E-mails or other records, a change in SR3A makes it much faster to display and access records listed on the Form Tabs of Contacts and Matters. [More...](#) on page 40

Search All Records with Wildcards and Connectors

The Search All Records box that you can put in your Main Toolbar now has powerful new ways to search through all the records in Time Matters. It is like having a Google search box for your database. The same Search features are available in the Global Search wizard. [More...](#) on page 40

Better Conflict of Interest Checking

The Conflict of Interest report has been improved to display in Landscape orientation and to export more effectively to MS Excel. [More...](#) on page 43

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Outlook Integration Improvements

You can connect multiple e-mails in Outlook to a Matter and Contact in Time Matters in one pass. You also have options for automatically processing attachments to Outlook e-mails. [More...](#) on page 43

Document Merge – .doc or .docx Setting

You can choose what file extension to use for documents created with Merge Templates. Note: It is unnecessary to use this feature if you use WordPerfect. [More...](#) on page 45

SUMMARY: Fixes for Data Problems

Versions 9.0 and 8.0 have had a number of issues that prevent the proper functioning of various features. Earlier Service Releases fixed a number of them, but SR3A for 9.0 and SR2D for 8.0 apply many more fixes.

These new Service Releases are critical and I strongly recommend that they be **installed as soon as possible**.

If you have never installed and used Version 9.0 or 8.0 before now, these issues will not affect your new installation of Time Matters 9.0 or Practice Advantage 9.0.

Two **serious issues** are fixed by the Service Releases. They have caused:

- Unintentional deletion of records, moving them into the Time Matters Recycle Bin. [More...](#) on page 48
- Failure of automatic updating of related records. [More...](#) on page 51

Version 9 SR3A and Version 8 SR2D fix these issues going forward but they **do not correct existing problems** with your records automatically. You need to take action to fix any existing problems. [More...](#) on page 48

The Service Releases also correct a number of issues in Time Matters, Billing Matters and Practice Advantage not discussed here. If you have had problems in the past that affected your records, you should contact Technical Support or a Certified Independent Consultant to discuss them.

Unintentional Deletion of Records Issue

For the Unintentional Deletion of Records issue, I **strongly recommend** that you check the Time Matters Recycle Bin – Main Menu | File | Recycle Bin – to see if it contains any unintentionally deleted records. This guide illustrates how to review and undelete records. [More...](#) on page 48

Updating Related Records Issue

For the Updating Related Records issue, Version 9 SR3A and Version 8 SR2D provide a utility program that LexisNexis Technical Support or a Certified Independent Consultant can use to fix affected records. I **strongly**

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recommend that you work with Technical Support or a Certified Independent Consultant to **fix any affected records as soon as possible**. In some situations explained here you can lose data if you do not act promptly to fix affected records. [More...](#) on page 51

Duplicate Indexes Issue (Enterprise Only)

When upgrading to Version 9.0 from an earlier version, unnecessary duplicate indexes may be created. These indexes increase the database size and backup size and can slow down performance.

To determine whether your database is affected, you can inspect your database yourself following the instructions, below, or contact Technical Support or a Certified Independent Consultant.

To fix the issue, a procedure can be run to eliminate the duplicate indexes. Contact Technical Support or a Certified Independent Consultant who is certified in Enterprise for assistance with correcting the issue. [More...](#) on page 59

Fixes for Other Issues in Time Matters and LNTPA

The Email and Attachment features were improved significantly. An important security change was made: Private records are no longer viewable from related records. A number of other issues were also corrected.

[More...](#) on page 60

Fixes for Issues in Billing Matters

A number of minor issues and several important issues were corrected in Billing Matters. [More...](#) on page 61

The [Fixes for Data Problems](#) section on page 48 gives a full explanation of these issues, their impact and how to fix them.

Known Issues and Work-Arounds

A few issues have been identified but not yet corrected. Work-arounds are available for some of these issues.

[More...](#) on page 62

A complete list of Fixed Issues and Known Issues is provided in the Release Notes available from the download page in the LexisNexis Service Center: <https://pm.lexisnexis.com/welcome>

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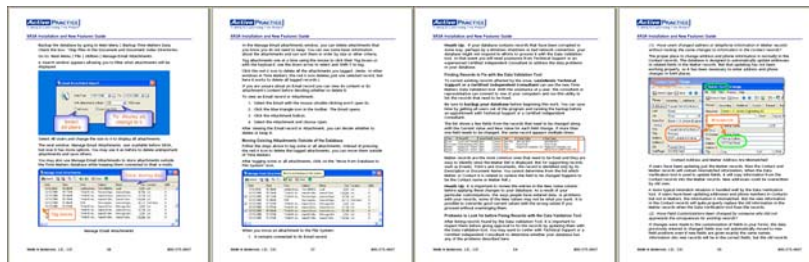
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This Free Version has useful information that gives you a good idea of what to expect in the Full Version of the guide. Here are some small screenshots of some of the Full Version pages to give you an idea of what they look like:



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Download the Service Release

To download the Service Release, use either Check for Updates within Time Matters (explained here under Option 1) or go to the Time Matters Service Center and download the installation file (explained here under Option 2 below).

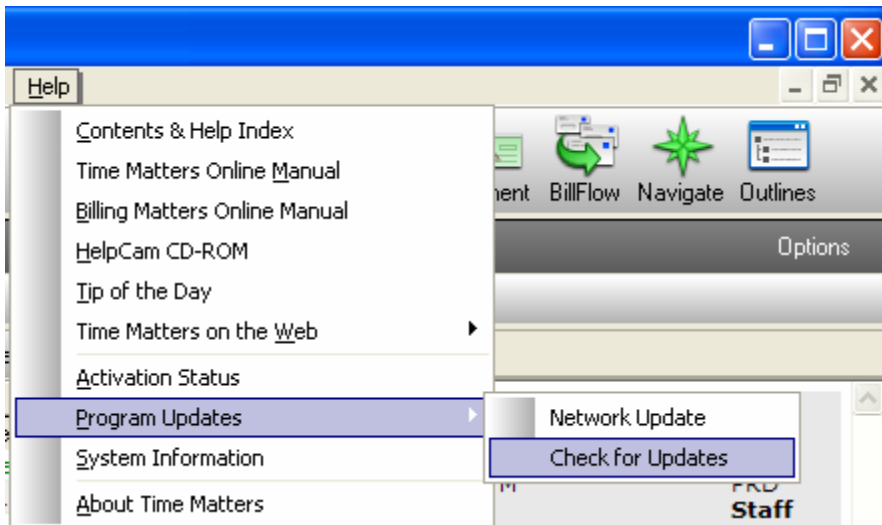
Soon after the release of a new Service Release, it may not be available via Check for Updates, so you will need to go to the Service Center.

Additional related materials, including a list of improvements, are also available for download from the Service Center. See the instructions on page 17 for downloading files from the LexisNexis Web site.

Option 1: Check for Updates in Time Matters

To download and install using Check for Updates:

In Time Matters, go to: Main Menu | Help | Program Updates | Check for Updates



Press Next.

Choose to download and install the Program Update.

You need to close Time Matters before you can proceed with the Service Release installation. Click the Time Matters button in the taskbar at the bottom of the screen and close the Time Matters program.

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The next section, "Option 2," explains how to download the Service Release if it is not available via Check for Updates and also how to download instructions about important new features.

Installation instructions continue after the "Option 2" section.

Option 2: Download Service Release from Web Site

If the Service Release is not available via the Check for Updates link in Time Matters, download the installation file from the Web site.

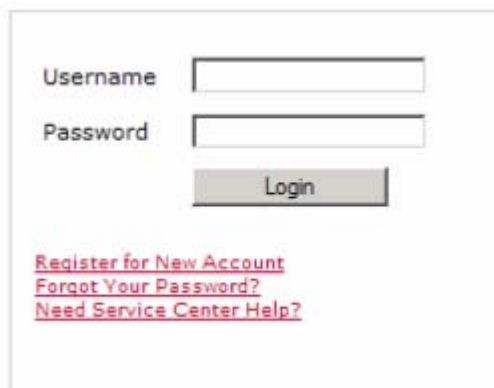
Logging In to the Time Matters Web Site

To download the installation file:

Go to <http://www.timematters.com>

Click on the Service Center in the upper right corner.

Login with a username and password. If you do not have these, you need to use the link, below, to Register for New Account.



A screenshot of the login page on the Time Matters website. It features two input fields: "Username" and "Password". Below the password field is a "Login" button. At the bottom of the form, there are three red links: "Register for New Account", "Forgot Your Password?", and "Need Service Center Help?".

If it is after hours and you cannot set up a new account, you may be able to get the download from your Certified Independent Consultant.

Downloading the Service Release Installation File

Go to: Service Release Downloads



Choose the correct download:

SR3A Installation and New Features Guide

Support | **Service Release and Update Information**

NEW Service Release 3A - LexisNexis Total Practice Advantage 9.0
Version 9.0 Service Release 3 (SR-3A) is now available for FREE by download in the Time Matters Service Center for current Version 9.0 customers.

- [Frequently Asked Questions \(FAQs\)](#)
- [Technical Support](#)

NEW Time Matters 9.0 Service Release 3A Exchange Synchronization
Time Matters 9.0 and LexisNexis Total Practice Advantage 9.0 Service Release 3A Exchange Synchronization

NEW Service Release 3A - Time Matters 9.0 and Billing Matters 9.0
Version 9.0 Service Release 3 (SR-3A) is now available for FREE by download in the Time Matters Service Center for current Version 9.0 customers.

- [Frequently Asked Questions \(FAQs\)](#)
- [Technical Support](#)

See the list of enhancements.

Click on [tmupdate.exe](#) for Professional or [tmupdatee.exe](#) if you have Enterprise (the Microsoft SQL Server edition of Time Matters).

Pro 3A - Time Matters 9.0 and Billing Matters 9.0

Service Release 3 for Time Matters 9.0 is now available for download. Service Release 3 features the following:

- Adobe® Acrobat® 9 Pro
- Enhanced Conflict of Interest Report - List Format Only
- PCLaw Worksheet
- Merge—Selecting Document File Extensions
- Synchronization Enhancements
- Storing Email Attachments
- Managing Legacy Email Attachments
- Support for Multiple Email Items Using TM Connect in Outlook
- Improved Form Tab Response Time - Enterprise Edition Only
- Firefox 3 Support
- BlackBerry Operating System 4.5 and 4.6
- Lexis® Front Office powered by Time Matters® Name Change
- Lexis® Back Office powered by Billing Matters® Name Change
- Microsoft SQL Server 2008 and Microsoft Windows Server 2008
- Integration with the PCLaw Remote Client

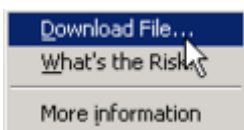
For Enterprise users, you can also download the Exchange Synchronization update through the Time Matters Service Center.

Release Files	
Professional	tmupdate.exe 95.96 MB 3 Dec 2008 Time Matters and Billing Matters 9.0 Service Release 3A for Professional
Enterprise	tmupdatee.exe 103.68 MB 3 Dec 2008 Time Matters and Billing Matters 9.0 Service Release 3A for Enterprise
Supplemental Documentation	
	Suptdoc9_SR3.pdf 1.93 MB 3 Dec 2008 Time Matters 9.0 Service Release 3 Supplemental Documentation

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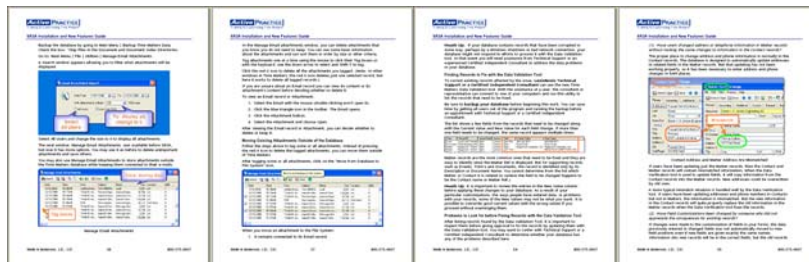
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SR3A New Features

Eliminating E-mail Attachment Bloat

What Is Attachment Bloat?

As e-mails with attachments sent and received with Time Matters, a copy of each outgoing and incoming attachment is saved as a database record. Attachment records take up far more space than ordinary records so they can cause problems.

Attachment Bloat occurs when the file or table storing attachments becomes too large because of very large attachments, such as images, audio and video files, or because of a large number of attachments.

Attachment Bloat is not caused by a bug in the program. It is caused by the accumulation of many e-mails with attachments that have never been deleted. The program has options for manually saving attachments and deleting them from their e-mails, but that is a time-consuming process. Many users don't know about it or don't use it consistently. Consequently, the more attachments they send and receive, the worse the problem becomes.

What Problems Does Attachment Bloat Cause?

Attachment Bloat can cause your database to swell dramatically. Attachments often account for more than 80% of the all the disk space used by Time Matters. As the volume of attachments grows over time, so does the risk of losing every one of them due to data corruption. A single file corrupted in transit across the Internet can make the entire collection of attachments or the whole Email feature unusable.

An effective nightly backup can minimize your loss of attachments if the problem is recognized quickly. But if you have a problem, the down-time and expense required to go through the restoration and recovery process can be considerable.

Attachment Bloat slows down the operation of Time Matters Professional. It can push the database size of Time Matters Enterprise to the size limit imposed by Microsoft's free versions of MS SQL Server and prevent the entry of all new records.

If Attachment Bloat is not controlled, you risk:

- Losing many or all of your attachments and e-mails;
- Spending time and money to fix your database
- Losing access to your database while the problem is being fixed
- Missing important e-mails

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Options for Managing Attachments

To avoid the risks and problems caused by Attachment Bloat, users of Time Matters Email have four options:

- Option 1: Move attachments outside of the database using the new features in SR3A;
- Option 2: Save attachments with the TM Save button on e-mails – a time-consuming chore;
- Option 3: Save attachments and e-mails semi-automatically using TM Connect in Microsoft Outlook;
- Option 4: Use TM-Tools, a third-party program (Enterprise only) to process attachments automatically.

It is important to understand the differences among these options for avoiding attachment bloat. The first option, new in SR3A, is automatic and invisible to the user. The other three options involve creating Document records and saving the attachments as files.

Recommendation: Option 1

I recommend that you immediately start using a new feature in SR3A to move e-mail attachments outside of the Time Matters database. It is simple to activate and works automatically and invisibly to prevent Attachment Bloat.

If your database currently is bloated with attachments, a related new feature allows you to move your old attachments out of the database. See: [Moving Existing Attachments Outside of the Database](#) on page 37.

You have other options for eliminating Attachment Bloat, each with their own pros and cons. They are discussed below. I think the new feature – storing attachments outside of the database – is the best option for most offices and recommend it.

Option 1 – Move Attachments Outside of the Database

This new option in SR3A is invisible to the user except in a few rare situations. Attachments are moved automatically out of the database, but they still look and work as if they are still in their corresponding e-mails.

Attachments that have been moved outside of the database behave as they did before. The moved attachments:

- Appear in the Attachment Pane at the bottom of Email records;
- Appear in the Attachment Count button at the bottom of Emails;
- Are indicated by a “1” in the Attachment Column you can add to e-mails on the Email tabs of Contacts and Matters and on the Main Email list;

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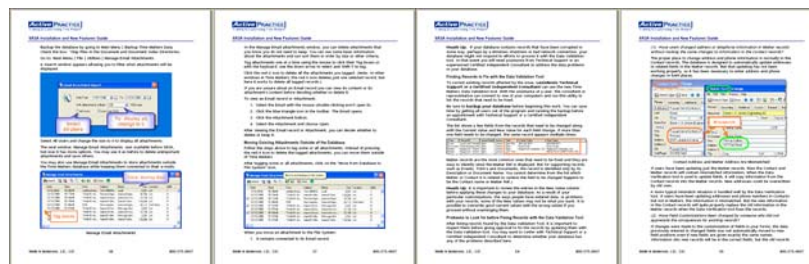
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Fixes for Data Problems

Versions 9.0 and 8.0 have had a number of issues that prevent the proper functioning of various features. Earlier Service Releases fixed various issues, but SR3A for 9.0 and SR2D for 8.0 apply many more fixes.

Two **serious issues** are fixed by the Service Releases. These issues have caused:

- Unintentional deletion of records, moving them into the Time Matters Recycle Bin.
- Failure of automatic updating of related records.

Version 9 SR3A and Version 8 SR2D are critical and I strongly recommend that they be **installed as soon as possible**.

Version 9 SR3A and Version 8 SR2D fix these issues going forward but they **do not correct existing problems** with your records automatically. You need to take action to fix any existing problems. If you have never installed and used Version 9.0 or 8.0 before now, these issues will not affect your new installation of Time Matters 9.0 or Practice Advantage 9.0.

The Service Releases also correct a number of issues in Time Matters, Billing Matters and Practice Advantage not discussed here. If you have experienced problems in the past that may have affected your records, you should contact Technical Support or a Certified Independent Consultant to discuss them.

Unintentional Deletion of Records

Description of the Unintentional Deletion Issue

Under some circumstances, records have been deleted unintentionally and moved to the Time Matters Recycle Bin. The occurrence of the issue was unpredictable and not apparent to users. The only ways to detect the issue were to notice that records were missing from their proper places or to check the Recycle Bin and notice that it contained records that were not deleted by users.

The versions affected were:

- 8.0 through 8.0 Service Release 2B
- 9.0 through 9.0 Service Release 1B and SR3

A similar issue affected some offices using Time Matters Exchange Synchronization. The synchronization process could, in some cases, cause records in Time Matters to synchronize to MS Exchange but be deleted from

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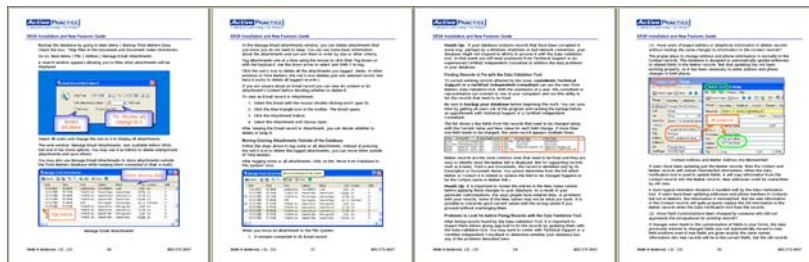
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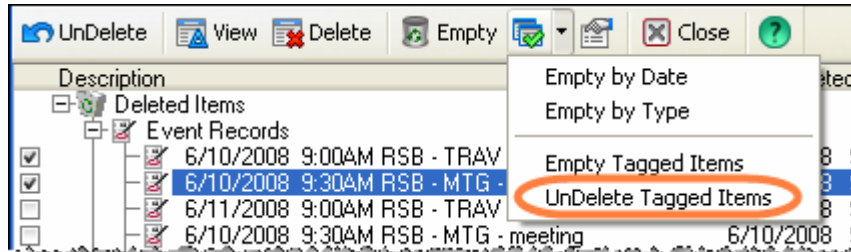
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4. Click: Undelete Tagged Items



The tagged records are retrieved and appear in the places where they were before.

Records Deleted by Exchange Synchronization

Before SR3A, synchronization with MS Exchange could cause records in some Time Matters databases to be unintentionally deleted. The issue affected some users of both **Version 8.0** and **Version 9.0**. The fix is the same as described above: Open the Recycle Bin and undelete the records.

Updating Related Records

Description of the Updating Related Records Issue

When Version 9.0 was released, an issue in the program prevented changes made in one record from updating the linked fields in related records. For example, you could change the street address, Zip code, and phone number a client's Contact record. These changes would not update the street address, phone Zip code and phone number fields in that client's Matter record.

Version 9 SR3A and Version 8 SR2D fix the updating issue going forward but do not automatically fix existing records that were not correctly updated.

After installing the Service Release, changes you make to Contacts and Matters will correctly update related records with linked fields. If you change any linked field in a Contact or Matter, all the linked fields in records related to the Contact or Matter will be updated.

The updating issue did not affect records being added for the first time. It occurred only when an existing record was changed and the changed field or field was matched to a field in another record.

The occurrence of the issue was not apparent to users. The only way to detect the issue was to notice that address or other information was up-to-date in some records but out-of-date in other related records. The issue could affect all types of records that had linked fields.

The Time Matters and Practice Advantage releases affected are:

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- Version 8.0 Service Release 2C, SR2A, and earlier
- Version 9.0 initial release, SR1, SR1A, SR1B, SR3

Databases that have been used with any of these releases are likely to have records that were not properly updated.

It is possible, but in most cases impractical, to manually fix improperly updated records. See the Note under [Fixing Records with the Data Validation Tool](#).

Version 9.0 SR3C and Version 8.0 SR2D provide a Data Validation tool that Certified Independent Consultants and LexisNexis Technical Support can use to find and fix affected records. It is important for a user familiar with the records to be involved in the process of identifying records that should or should not be updated. This guide explains in detail the process of finding and fixing records.

Impact of the Updating Related Records Issue

Users who were aware of the issue knew that they had to make address changes in more than one place. Those who were unaware of the issue or forgot to perform the manual changes ended up with out-of-date addresses and other incorrect information in some records.

One type of related record updating has worked consistently in all releases. When a Matter Name or Matter Number is changed, the change has been updated to all related records. The same is true of the Reference Name or First, Middle and Last Name fields and Contact Number fields in Contact records.

Here is a hypothetical example of how the related records issue could cause embarrassment or worse. At the start of a marriage dissolution action, a client gives her attorney the address where she and her husband are living. The address is entered into her Contact record and linked to the Primary Contact area of her Matter record. Later she moves out of the house to a new address. Her lawyer changes the address in her Contact record, but change does not update her address in the Matter record. The lawyer's assistant sends a privileged letter to her using a Merge Template that pulls the old address from the Matter record. The client's opponent, her estranged husband, receives the letter at the old address.

Determining Whether the Updating Issue Affects Your Database

If you used one of the affected releases, it is likely that some records are not up-to-date. The issue only affects records that should have been changed when a related Contact or Matter record was changed. Lookups and linked fields have always worked correctly when entering new records.

The most common data problem appears in addresses in Matter records. Address changes in Contact records did not cause the linked addresses in

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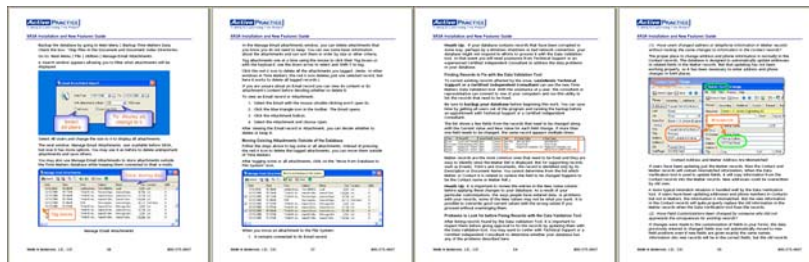
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About the Author



Wells H. Anderson specializes in Time Matters and Billing Matters software, offering customization, training and support via telephone, Web conferencing, and training materials.

A Top Performer for Time Matters Software and Winner of the Legal Technology Consultant of the Year Award for 2000 from TechnoLawyer, he is president of Active Practice.

Please call to find out how he can help you become more efficient and profitable with Time Matters Software.

Wells H. Anderson
ACTIVE PRACTICE LLC
5200 Willson Road #150
Minneapolis, MN 55424

phone 800-575-0007
fax 815-301-8545
e-mail info@activepractice.com
web <http://www.activepractice.com>
Click on this link

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