



# Using Time Matters® Software as a Document Management System

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## Overview

This document explains how to scan and save a document using the document management features of Time Matters software.

Part 1: Scanning and saving a document

Part 2: Searching and Retrieving documents

## **Part 1: Scanning and saving the document**

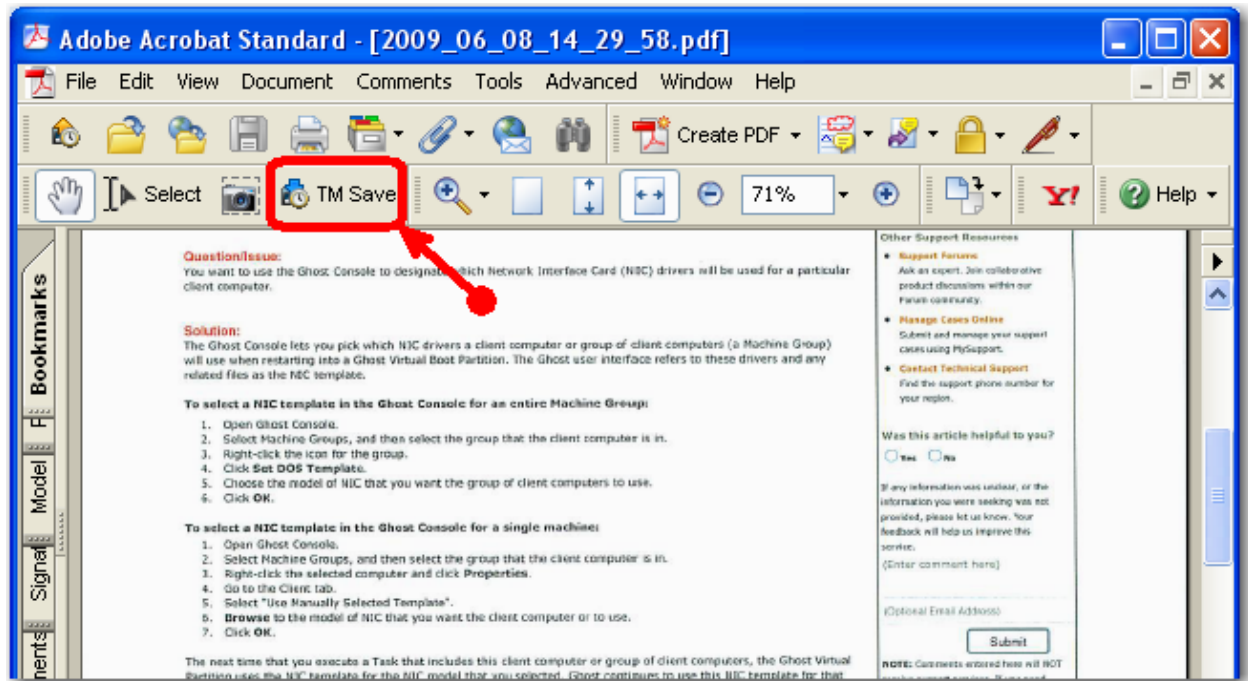
Step 1: Scan a document.



Most scanners will scan documents in Adobe Acrobat format, also known as 'PDF' format.

Depending on the scanning system you have, you may have to manually open the scanned document or Adobe Acrobat will be opened for you automatically.

Step 2: Open the Scanned Document in Acrobat and click the “TM SAVE” Button.



This screenshot shows the Adobe Acrobat screen containing the scanned document. Note the new button – “TM Save.”

Clicking the new button will open the document profile screen from Time Matters.

### Step 3: Fill out the Document Profile and click ‘Save&Close’

- 1,2,5 Date, Time and Staff Person are automatically filled-in
- 3 Optional – Classify the document with 1 or more Classification Codes
- 4 Type in the document description – becomes the file name
- 6 Look-up from your list of ‘Contacts’
- 7 Document path is automatically created
- 8 Up to 8 fields of customized index information for you to fill-in
- 9 Free-form notes can be added and searched

**DONE!**

**But what just happened?**

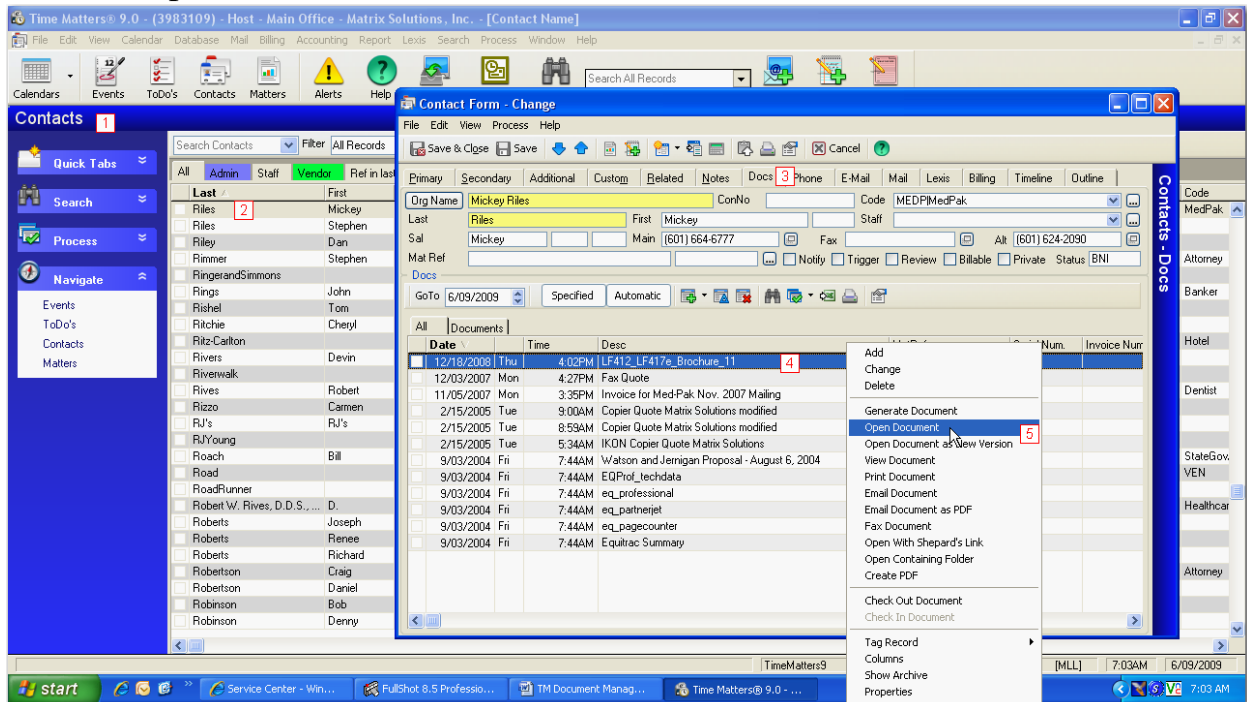
1. The actual file was copied to your document ‘tree’ on your shared drive
2. An ‘entry’ was made in Time Matters saving all of the information entered above in a searchable format.

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# Part 2: Searching and retrieving documents

Method 1: Open the Contact and view all of the associated documents



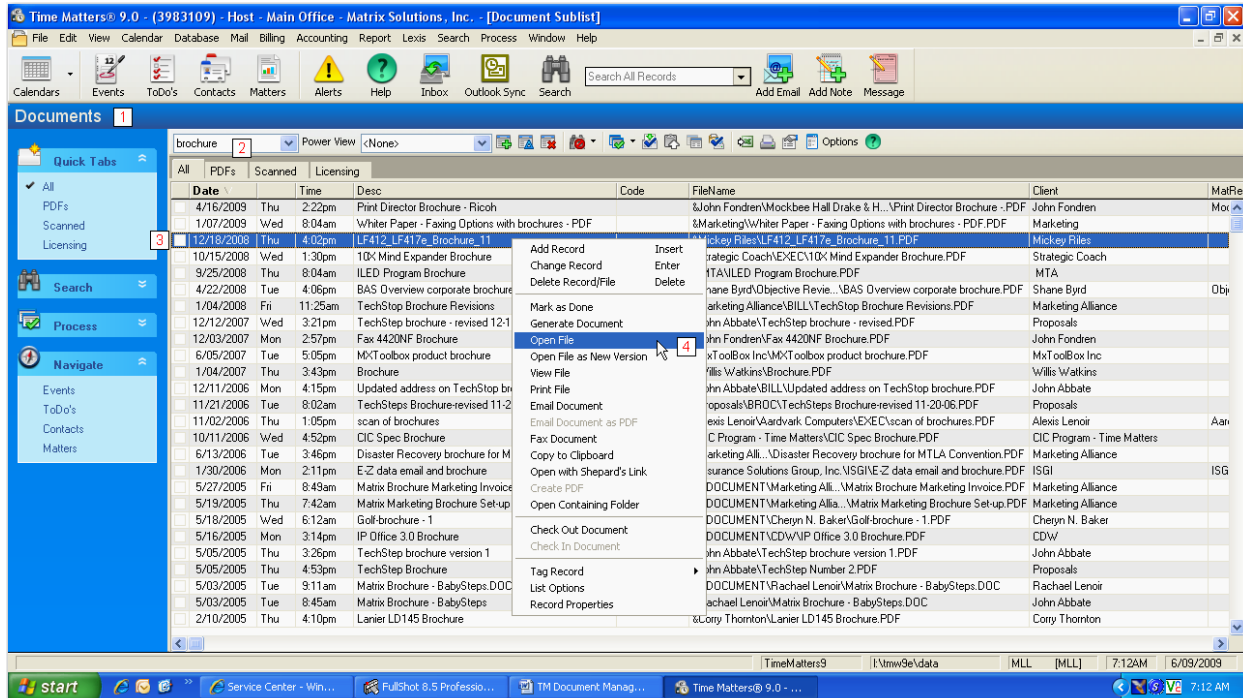
1. Open the Contact List ( this is your 'rolodex' )
2. Open the desired Contact
3. Click on the DOCUMENT tab to see all documents for this contact
4. Click on the desired Document listing
5. Right-Click and choose OPEN the document.

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# Part 2: Searching and retrieving documents

Method 2: Do a text search of all of the index information



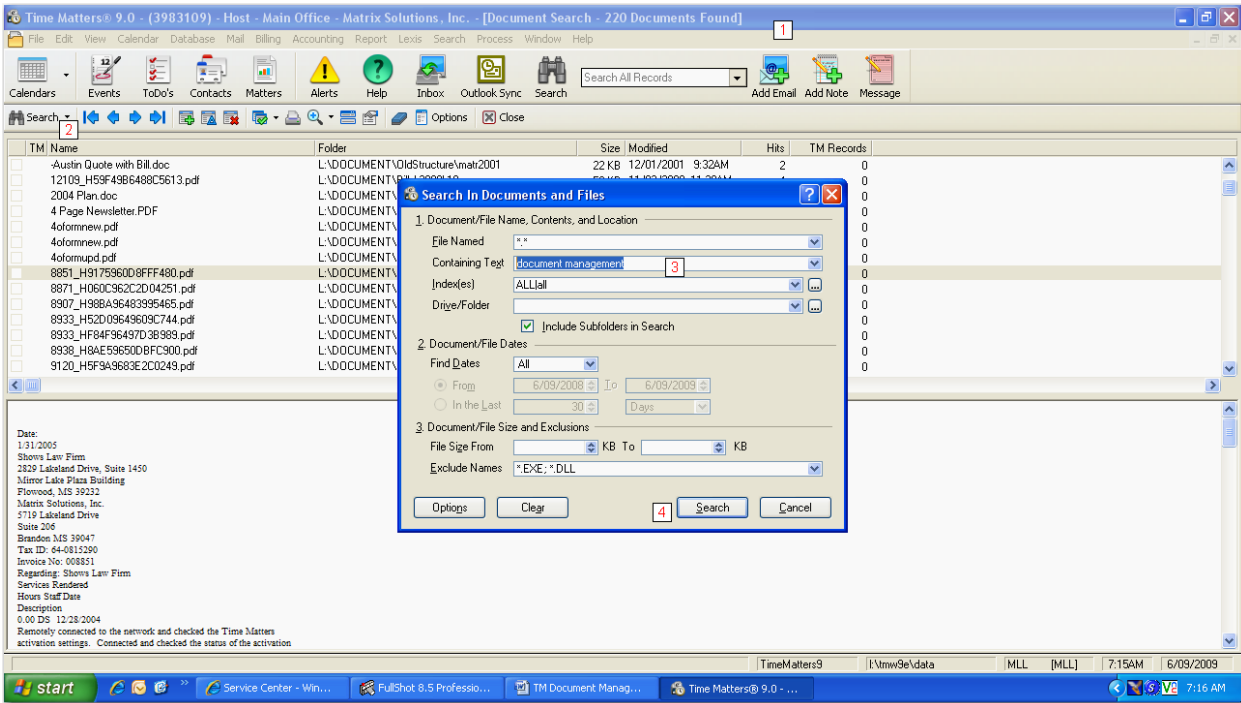
1. Open up the Document List
2. Type in your search word ( "brochure" in this example )
3. Locate the desired document
4. Right-Click and OPEN the document.

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# Part 2: Searching and retrieving documents

Method 3: Do a text search of all text within all of the documents



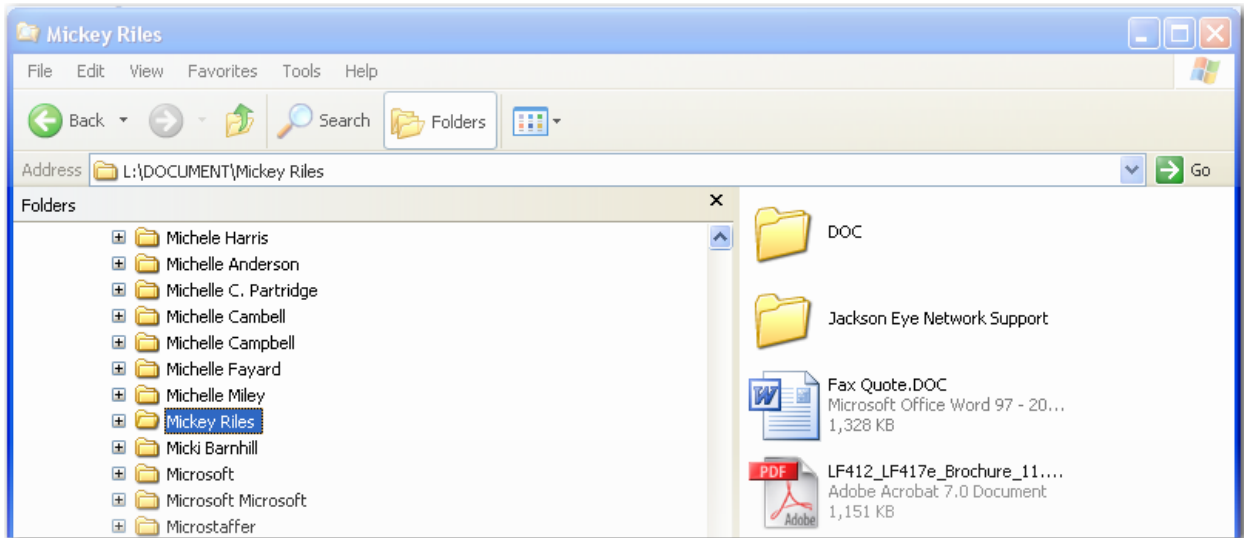
1. Open the Document Search Screen
2. Click the SEARCH Button
3. Enter your search string
4. Click SEARCH. The resulting documents are listed and can be opened.

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## Part 2: Searching and retrieving documents

### Method 4: Browse out to your Document Tree



Even though the documents are listed in the Time Matters database, the actual files are saved in an easy-to-read folder structure on your shared network drive.

# About Time Matters Software

- TM is a product of Lexis Nexis Corporation.
- It is 'practice management' software program and contains modules for management of contacts, projects, calendars, to-do lists, email, notes, time-tracking entries, outlines, and documents.
- All of the functions do not have to be used.
- For handling documents, only the CONTACT LIST and DOCUMENT MANAGEMENT functions would have to be used.
- Support is available directly from Lexis Nexis or through Certified Independent Consultants
- TM requires a data server capable of running a version of Microsoft SQL Server
- Cost is roughly \$650 for first license and \$350 for each additional license
- Licensed by concurrent users - can be installed on multiple workstations
- Monthly software leases and annual maintenance plans are available
- Cost to install as a document management system, configure, document and train is approximately \$750
- More information is available at <http://www.timematters.com>.

End of Document