Time Matters®

Saving Outlook Emails and Attachments

Time Matters provides the option to save sent and received emails through Outlook. This can be invaluable in tracking activity on a case. However, if attachments are incorrectly saved, the database will experience what is called "Attachment Bloat".

If the attachment file becomes too large, the firm risks decreased response time, and the possibility of losing all attachment records.

To prevent Attachment Bloat, be sure to save attachments in the client's folder and not as an attachment to an email in Time Matters. Here is how this is accomplished:

1. When sending an email with an attachment, the prompt to save to Time Matters provides 3 options:

Attachment Handling
Save attachments as Attachments to the Email Document records related to the Email Do not save attachments from this Email
ОК

DO NOT CHOOSE THE CENTER BUTTON – THIS CREATES ATTACHMENT BLOAT.

- 2. If the attachment is to be linked to the email, choose the first option and click OK
- 3. The email record will open; fill in the regarding information and anything else (description) on the form SAVE THE EMAIL

🔙 Time Mat	tters Email	-02
File Edit Vi	iew Process Help	
📊 Save & Cl	ose QaReply DQ Forward 🚇 Reply All 🔚 Save 😽 🛧 😭 🕶 🔀 🚔 🐼 Cancel 🕜	
Primary C	ustom Related Notes Documents Phone Email Mail Web Billing Outline	n
<u>D</u> ate	2/03/2009 🚔 Tue Time 9:30pm Code	
Subject	Staff TSR Terry S Rosenthal	
Regarding		
From	terryr@tsrconsult.com	
То	[terryr@tsrconsult.com]	
Reminders	Follow Done Notify Hide Trigger Review Billable Private Status	

4. Next, click the "Attachment" tab at the bottom of the email form



- 5. Click TMSave and save it as a Time Matters document record
- 6. Then click the Delete button to delete the attachment NOTE: The document is not deleted because it is saved. Once again, SAVE the Email record

Users User4	User8						
Message At	ttachment 🛛 HTML 🛛 🔯 Open 🕞 Attachments (1. 🕞 TM Save 🙀 Delete 🙀 Add to Calendar						
File Name	OG Size 3752						
1st Click TM Save then click Delete							

7. The document record appears on the RELATED tab of the of email form (the ~ means it is a specified relationship).

File Edit V	tters Email liew Process Help loseReply pForwardReply AllSave ♣ 合 ★	-1					
Primary Custom Related Notes Documents Phone Email Mail Web Billing Outline							
<u>D</u> ate	2/03/2009 🗣 Tue Time 9:30pm Code 💌						
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Regarding		appears on the					
From	terryr@tsrconsult.com	email record's					
To	"terryr@tsrconsult.com"						
Reminders	🗌 Follow 🗍 Done 🗍 Notify 🗍 Hide 🗍 Trigger 🗌 Review 🗍 Billable 🗌 Private Status	as a specified					
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📑 View 👻	Specified Automatic 😨 🔂 🙀 👫 • 🧒 • 📥 😭 🖥 Options						
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This process applies to emails that are either sent or received.

Storing Email Attachments Outside of Database

Another setting that must be reviewed is under Program Level Setup, General tab. This feature became available in Time Matters 9, service release 3A. This reduces the size of the attachment file because the actual attachment is stored outside the database. Therefore, the file increases based on the number of attachments.

Attachments stored inside db: attach.tps represents size of attachments; Attachments stored outside db: attach.tps represents number of attachments

📸 Pro	ogram Level Setup	×
6	General	Default Program Version
	– Fjrm Begional	Program Series Legal/Law Firm/Legal Department ▼ Property File Legal ▼ Matter Label Matter ▼
0	Le <u>x</u> isNexis	Country USA V
	Li <u>s</u> ts <u>F</u> orms	Archive reminder when # of records reaches 0 + Batch Archive # of days before today 90 +
=	<u>B</u> illing	Application Update Check for new version Never
<i>₽</i>	Lin <u>k</u> s <u>U</u> pdate	Enable Local Area Network update Backup
65	Sy <u>n</u> c	Enable Backup Warning Warn every days starting from date of last backup
		Email Setup Program Level Spam Rules Spam Options Allow Users to set up their own spam rules Store Email attachments outside of database
		Files Directory Alternate Directory F:\data\TMW_Attachments Encrypt externally stored attachments
[<u>D</u> efaults	<u> </u>

After the above is completed, exit and re-open Time Matters and run the "manage email attachments" utility. See details on the following page.

From the main screen click FILE ... UTILITIES ... MANAGE EMAIL ATTACHMENTS. The following screen will appear:

📸 Email At	tachment Search	×
	Date From: 1/01/1900 🌲 To: 12/31/2010 🌲	
_ _	With attachments at least 1 KB in size	
	All Users O Just User TSR	
	<u> </u>	

Set the attachment size to 1 KB and choose "All users". Click OK. After the utility runs, select all documents and then click the option to "tag all records"

18	Manage Email	Att Tag All Red	cords					?	
A Search 🔂 🙀 🔂 🕢 😧 🗶 Close 🕜									
	Date	Time	From	Subject	Name	Size	Location	InDB	
	8/17/2009	7:57PM	terryr@tsrcon	Time Matters	image001.gif	4,476	List	N	
	10/06/2009	8:09PM	terryr@tsrcon	FW: Client co	image001.jpg	17,506	List	N	

And then "move from database to file system"

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		Date	Time	From	Subject	Name	Size	Location	InDB	
ľ		8/17/2009	7:57PM	terryr@tsrcon	Time Matters	image001.gif	4,476	List	N	