# 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:
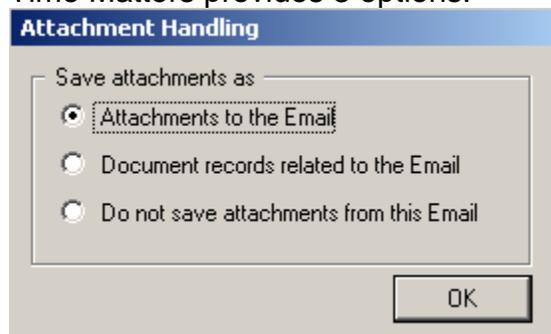


   DO NOT CHOOSE THE CENTER BUTTON – THIS CREATES ATTACHMENT BLOAT.

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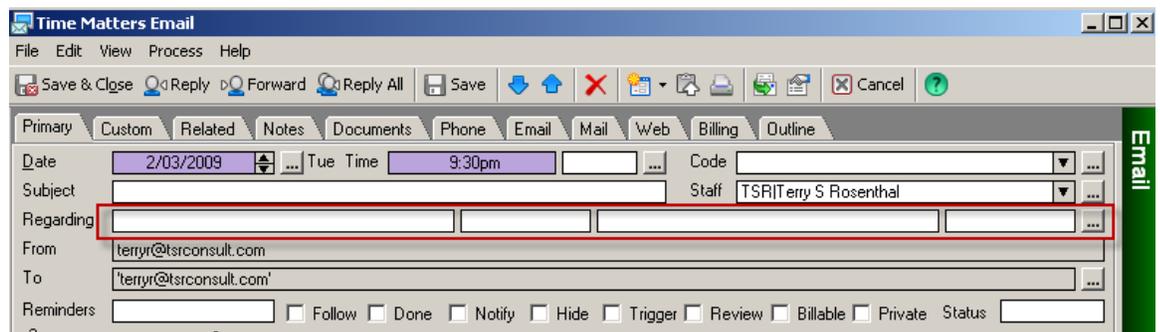
4.    Next, click the "Attachment" tab at the bottom of the email form



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



1st Click TM Save --- then click Delete
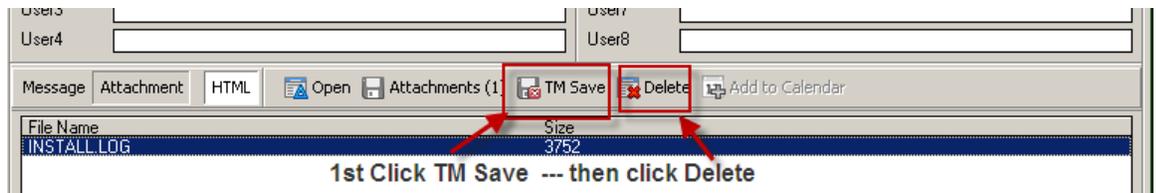
7.    The document record appears on the RELATED tab of the of email form (the ~ means it is a specified relationship).
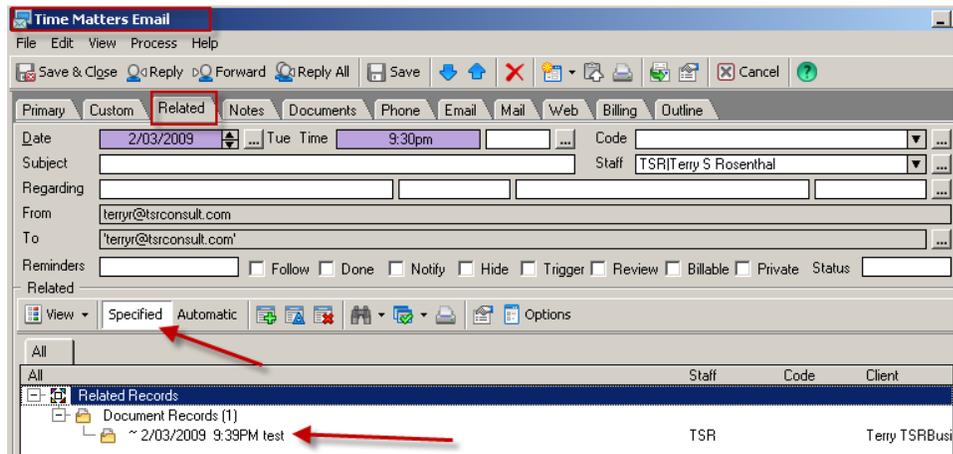


The document appears on the email record's "RELATED" tab as a specified relationship.

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
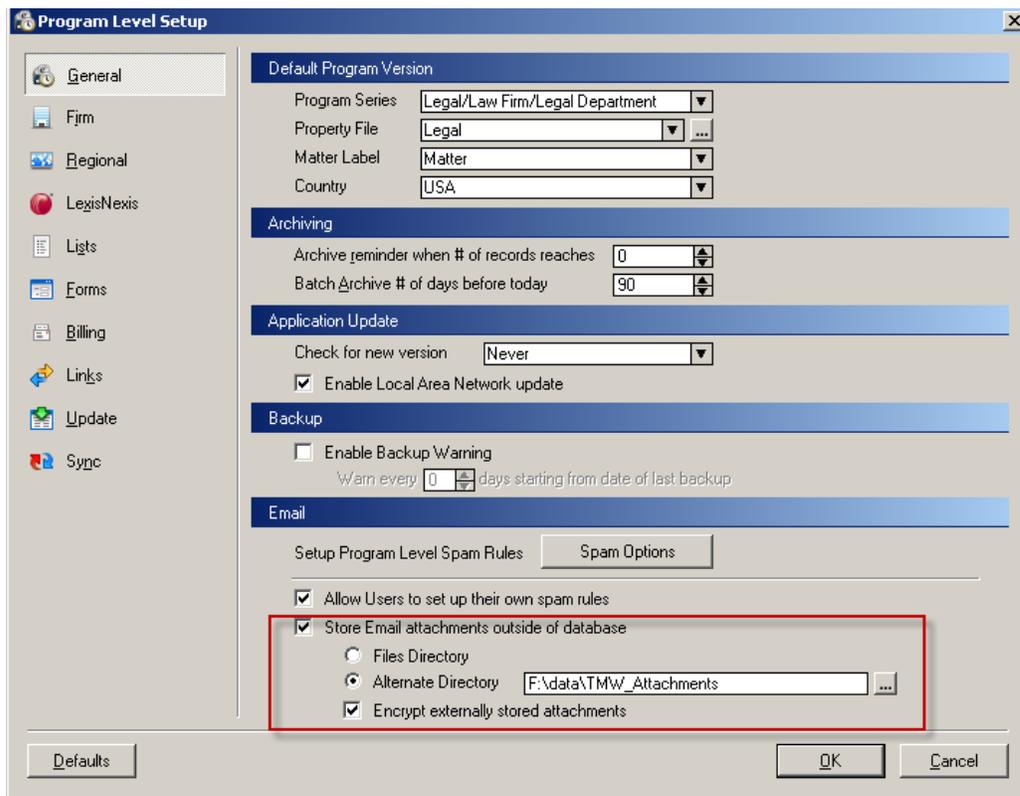


After the above is completed, exit and re-open Time Matters and run the "manage email attachments" utility.  See details on the following page.

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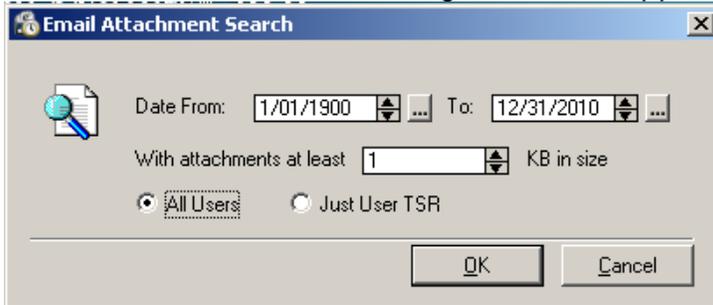


Set the attachment size to 1 KB and choose "All users".  Click OK.  After the
utility runs, select all documents and then click the option to "tag all records"
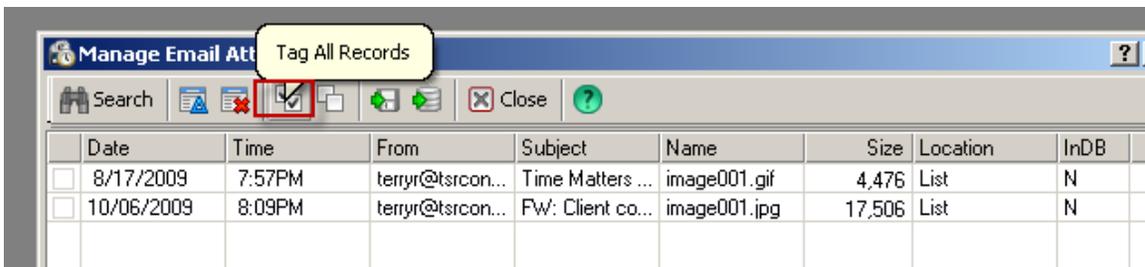


And then "move from database to file system"