

## **How to Access Time Matters** **from a SmartPhone**

*A White Paper Discussing How to Access Your Time Matters Data from a Treo Palm, Windows, or Pre; Windows Mobile; BlackBerry; iPhone; Symbian; or Android Smart Phone*

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Lawyers increasingly want to take all of their Lexis Time Matters (a/k/a Lexis Practice Advantage) law practice data with them outside the office so they can increase their productivity and improve their quality of life by utilizing what would otherwise be down time at the courthouse or between meetings when they're not in the office. This permits them to respond quickly to client emergencies or prospective client inquiries, working from home instead of going into the office on the weekends, and generally being able to practice law when they otherwise wouldn't be able to do so.

We're not talking about writing a Supreme Court brief here, we're talking about calling or emailing someone in your Time Matters contact list, checking your calendar, and performing tasks such as responding to phone messages from clients, or to web site hits from prospective clients, which can be accomplished without a full-size keyboard and monitor. Doing so during down time allows "up time" to be spent doing work that can only be done in the office.

This can be done in several different ways: Using a computer at home that is connected to the office system; a laptop with a 3G "air card" to connect to the office; or a SmartPhone that can access the data in Time Matters. Another option is to synchronize ("sync") the entire Time Matters database in the office to a clone database on a remote computer, but with wireless Internet access so common, it is much simpler, easier, and less problematic to work on the main Time Matters database using an Internet connection and a remote access program such as Microsoft terminal services, GoToMyPC, or LogMeIn.

This article will focus on just one of these methods: using your SmartPhone to keep up with your practice. For the purposes of this article, a "SmartPhone" is a cell phone that also runs applications that are similar to the functions in Time Matters, such as an address book, calendar, task list, note list, case list, and billing list. Most cell phones

include an email function, but linking email in Time Matters is done in the Time Matters application, not on the cell phone.

You have three options to access Time Matters with a SmartPhone: a wired sync, a wireless sync, and a web portal.

### **1. Wired Sync**

The first, and traditional, option is a wired sync between Time Matters and a SmartPhone. This was considered a minor miracle when it first became available in Time Matters v. 3 in 1999 with the Palm Organizer<sup>®</sup>, but today wired is passé and wireless is where it's at. Time Matters currently provides a wired sync with the Palm Treo (for Contact, Event, ToDo, and Note records), Windows Mobile (for Contact, Event, and ToDo records), and BlackBerry (for Contact, Event, ToDo, Note, Case, and Billing records) devices.

The obvious disadvantage to a wired sync is that you have to remember to sync the SmartPhone before you leave the office, and the data does not get refreshed until you return to the office and re-sync it. Other disadvantages are that the Windows Mobile sync can be slow, especially if you have a lot of data to sync, and the BlackBerry sync does not use the native BlackBerry contact, calendar, notes, and tasks applications, because BlackBerry required non-Microsoft apps like Time Matters to write their own applications to run on the BlackBerry, which are DOS-looking and less functional than what most BlackBerry users expect. For example, you can't select a synced contact by scrolling, and then call or email them by tapping the screen. Thus, BlackBerry users typically don't like this option.

The one bright spot here is that if you have a Palm Treo (there is no support for the Pre operating system as of the writing of this article), and don't mind syncing only when you are in the office, the sync is fast and very reliable. This is the least expensive option, in that it doesn't require additional software and doesn't require much expert maintenance.

### **2. Wireless Sync**

As noted above, wireless is where it's at, as evidenced by the "CrackBerry" revolution. Time Matters provides a built-in wireless sync with the BlackBerry, which requires the BlackBerry Enterprise Server ("BES"). Time Matters syncs with the BES, and the BES transmits that data across BlackBerry's wireless network to sync with the BlackBerry SmartPhone.

So, the good news is that it's wireless, but the bad news is that you have to purchase and maintain the BES, and the Time Matters applications on the BlackBerry are the same DOS-looking applications described above that are less functional than the BlackBerry's built-in applications. However, if you can live with these limitations, then you can sync not only Contacts, Events, ToDo's, and Notes, but it's the only platform that

also syncs Matters and, if you use Time Matters or Billing Matters to track your time, Billing records. If you are a prodigious biller out of the office, that's an important consideration.

If you have a working BES, then you can receive automatic notifications of changes to your Time Matters calendar and other records on the BlackBerry without user intervention. This is the only sync that provides an active notification of such changes.

If you need active notification of changes to not only your calendar but also any Time Matters records when you are out of the office, then take a look at Msg2You, a Time Matters add-on application developed by OTB Consulting. <http://www.otb-consulting.com/content/blogcategory/70/239/>. It converts a Time Matters Messenger instant message to a text message or email and sends it to your cell phone automatically, so that if someone in the office wants to notify you about an important Event, Case, Contact, Email, or other Time Matters record, or just wants to send you an "IM" (instant message), they can send it to you via the Messenger and you will receive it as a text message or email on your phone. Msg2You can be configured to only send text messages when you are out of the office, using the Time Matters In/Out list (View > In/Out List or ALT+SHFT+L).

User ID	User	In	Out	Will Return	Comment	Out Since
TM	Matters, Time	[In icon]	[Out icon]	2/16/2010 9:00AM	[Comment icon]	2/13/2010 2:58PM
AAH	Howell, Albert A	[In icon]				
ASM	Monroe, Allison S	[In icon]				
BEA	Angella, Barbara E	[In icon]				
DB	Brickley, Dan	[In icon]				
DBH	Halomar, David B	[In icon]				
DTM	Miller, Dan T	[In icon]				

*Time Matters In/Out List*

There is no built-in Time Matters wireless sync for Palm Treo SmartPhones, Windows Mobile SmartPhones, or other SmartPhones that sync with Outlook, such as the iPhone and Symbian phones, but it is possible to configure a "two-step" sync: Time Matters can sync with Microsoft Outlook/Exchange Server, and then most SmartPhones can sync with Outlook/Exchange Server. The details of how SmartPhones sync with Outlook/Exchange vary from manufacturer to manufacturer, and phone to phone, and is beyond the scope of this article.

There is also a very inventive method of syncing a Palm SmartPhone wirelessly by substituting the Internet for the sync cable described by Time Matters Certified Independent Consultant Kevin Bross on his web site at <http://www.abacus-consulting.com/content/blogcategory/14/57/>.

There are two ways that Time Matters can sync wirelessly with Outlook/Exchange. First, some definitions: Microsoft Outlook is an email program that

runs on a single computer, the data for which is stored in a .pst file on that computer. Microsoft Exchange Server is an email server running on the local area network to which many client (workstation) computers can connect that provides centralized email management, and can also provide centralized anti-spam and anti-virus protection. The email and other data used by the workstations reside on the server, and are stored in a variety of files.

Time Matters has a Microsoft Outlook sync function, which syncs Contact, Event, and ToDo records. After the initial setup, it requires each user to click File > Synchronize > Outlook > Begin Sync to sync the records, so you lose the ability to get the data changes in real time unless someone goes to your desk and runs the sync. Only Outlook folders to which that user has access are synced, so each mobile user's workstation has to be synced separately. The sync can take a long time if there are a lot of records to sync, and Outlook has an irritating security confirmation that requires you to click through it every 10 minutes or the process halts until you do, although a registry hack and a third-party add-on program are available to by-pass it. Once synced, your SmartPhone's Outlook sync program would take over the Outlook-to-SmartPhone sync to get the Time Matters data to the SmartPhone, and vice-versa.

Time Matters also has an automatic server-to-server sync function with Microsoft Exchange Server, the "Time Matters-Exchange Sync," which works between the Time Matters Enterprise software and the Microsoft Exchange Server software, with no user intervention necessary. Contrary to the Outlook sync, it will sync all users' data at the same time. This requires that you use Microsoft Exchange Server, which could be an additional expense, although you might already own it if you own Microsoft Small Business Server. Setting up, administering, and maintaining Exchange Server is beyond the keen of most, even techie, lawyers, so your network support company would probably need to do so.

An interesting recent development is the availability of hosted Exchange Servers and BlackBerry Enterprise Servers, in which an outside vendor provides Exchange Server or BES services over the Internet. The vendor charges a monthly fee for the hardware, Exchange Server or BES software, and its services. Except for slowness compared to the data being on the same network instead of having to reach it through the Internet, this appears to be a viable substitute technically for an on-site Exchange Server or BES, and it appears to work with the Time Matters Exchange Sync just as it were local. There are confidentiality, security, backup, and data ownership issues with this new technology that need to be addressed before a firm commits to such a system.

The design of the Time Matters Exchange Sync has steadily improved from version to version, and from service release to service release, but it is still not perfect. There is no ability to custom map the fields between Time Matters and Outlook/Exchange, and there are some decisions to be made in setting it up to prevent unforeseen consequences. Time Matters is the quintessential groupware application, while Exchange Server and BlackBerry are designed to handle an individual's data. Events and ToDo records (which are congenitally user-specific) are easier to sync

properly than Contact records (which are usually firm-wide). You can end up duplicating all of the contacts in everyone's Outlook address books in Time Matters if you're not careful. Because Exchange Server lives in Microsoft land, and respects Windows login IDs and passwords, and Time Matters does not, small changes in passwords, drive mappings, user and group security, etc., can cause all or parts of the Exchange Sync to stop working, so regular maintenance/troubleshooting should be budgeted.

Because the BlackBerry Enterprise Server also has an Exchange sync function that utilizes the native BlackBerry applications, Time Matters can be synced with BlackBerry devices using the same two-step approach: Syncing Time Matters to Exchange with either the Time Matters (manual) Outlook Sync or the (automatic) Exchange Sync, and then syncing Exchange to a BlackBerry using the BES. This avoids the disadvantages noted above that are inherent in the direct Time Matters-BlackBerry sync concerning the look and feel of the applications Time Matters was required to write for the BlackBerry vs. the native BlackBerry applications.

### **3. SmartPhone Web Portal**

An alternative to the trials and tribulations of syncing is MobileTM, a SmartPhone web portal application. As described above, syncing may require both out-of-pocket costs for software and hardware to run Exchange Server and BlackBerry Enterprise Server, and someone's administrative time and/or money to keep the sync(s) working: "Sync(s)" because if a firm has mobile users with different phones that sync differently, it has to maintain multiple sync operations, which can be a big headache and expense.

MobileTM was developed by Steve Stockstill, currently the principal of Data Equity, LLC and formerly the programming manager at Time Matters. MobileTM is not a sync because there is no data that is stored on the cell phone (and none to get lost, either). It's really a substitute for pulling out your laptop and connecting directly to the Time Matters database in your office, except that it just needs 3G cellular service, has a smaller screen, and is currently read-only.

MobileTM runs on a SmartPhone browser. What this means is that on a Treo, Palm Pre, Windows Mobile, BlackBerry, iPhone, Symbian, Droid, or virtually any handheld device with an Internet connection and a web browser, you can see almost all of your Time Matters data. It is strictly view-only at this point, although data entry is a possibility in the future. However, you can view any data in Time Matters, except for Custom Forms, Outlines, Messenger, and Inbox, and the last two are on the drawing board.

You can view your Time Matters Contact list, click on the contact's phone no., and dial the phone.



*MobileTM Contact List Shown on a Palm Treo*

You can view the Matters in Time Matters, and view any field in the record.



*MobileTM Case List Shown on an iPhone*

You can view your Calendar, with Events and ToDo's on MobileTM.



*MobileTM “Agenda” Shown Events and ToDo’s on a Windows Treo*

Not only can you view each type of record in a list, but you can view records related to cases, as you would normally do using Time Matters. This is not possible on any sync. This means that immediately upon someone adding a Phone record to a Matter in the office, you can view the same matter on your MobileTM and see all of the Phone records that are related to that Matter, including the one just entered moments ago, and call the person with one tap on the screen.

Some folks who have adopted MobileTM still use some kind of sync, especially those with easy to sync devices like the Treo, because the two applications are complimentary: MobileTM shows almost all Time Matters data, and the sync lets you add events, etc., on the phone. Those who need to change their calendars on the go may send a text message or email, or call their office, in lieu of the more time-consuming and expensive sync options.

It appears we are entering a phase where the SmartPhone operating system that most easily syncs with Time Matters (the Palm operating system previous to the new Pre

device) is fading, and the more popular devices (BlackBerrys, iPhones, and 'Droids) are the most difficult and expensive to sync, especially wirelessly.

MobileTM fits a niche for those who want to access their Time Matters data from their SmartPhone without spending any time or money keeping a sync working. This is especially true for smaller firms that don't have the IT expertise and time to devote to keeping these systems running, and especially if everyone has a different SmartPhone.

MobileTM requires Time Matters Enterprise 7 or higher. It does not require Microsoft Exchange Server or the BlackBerry Enterprise Server. More information is available at <http://www.dataequity.com>.

At the Lexis Practice Management Annual Conference on September 13, 2010, Lexis announced that it is planning to release in v. 11 circa late Q1, 2011, a "mobile module," which presumably will provide some degree of access to Time Matters from a mobile phone. No other details are available at the time this white paper was written. Check the Time Matters web site, <http://www.lexisnexis.com/law-firms/practice-management/specialized-law/time-matters.aspx>, for updated information.

## Conclusion

So, the answer to the question of what is the best way to use a SmartPhone with Time Matters is, "It depends."

It depends on whether the SmartPhone platform is the most important consideration, in which you select your favorite model SmartPhone, and later figure out the best way to access your Time Matters data. Although many lawyers follow this thought process (also known as the "Law of Lawyer Attraction to Shiny Objects"), it's not the best process to follow if you want your SmartPhone to be an integral part of your law practice management system and to maximize your productivity. However, if you do choose the SmartPhone first, then the options for each device are discussed above.

If you are flexible with regard to the model of SmartPhone your firm will use, then you can make the decision based on your firm's needs. Do you need to enter data into Time Matters from your SmartPhone, and do you need instant access to the information that only a wireless sync can provide? If so, is that worth the cost of setting up and maintaining one or more sync programs? If so, you can use any SmartPhone that syncs wirelessly with Time Matters as discussed above.

Do you need instantaneous notification of new emails, changed appointments, and changed contacts? If so, then a BlackBerry SmartPhone would fit the bill if it's worth the cost of installing and maintaining a BlackBerry Enterprise Server, or using a hosted BES. Or, Msg2You might fill this need.

If you need to enter data on the SmartPhone and cost is the most important issue, both in terms of cash outlay and your or someone else's time to configure and administer

the system, then probably the most current supported Treo Palm SmartPhone (or an older one that is supported by your carrier that you can purchase on eBay for \$10), using the Time Matters built-in wired Palm sync (or the wireless sync method described by Kevin Bross noted above) is the way to go.

If you can live without entering data on the SmartPhone, MobileTM gives you almost all your Time Matters data on any mobile web browser platform with no unforeseen costs to worry about. Plus, because it utilizes a web browser, everyone can use a different SmartPhone without having to master a new sync process, and there is no danger of your data falling into the wrong hands if you lose your phone because the data is in your Time Matters program at your office, not stored on your SmartPhone. Access to MobileTM is controlled by a user ID and password.

For some, the best of both worlds may be to wirelessly sync their Contact, Events, and ToDo's so that they can enter that information on their SmartPhone, and use MobileTM to view the rest of their Time Matters data when they are out of the office.

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