

LexisNexis[®] Time Matters[®] v10 Upgrade Check List & FAQ

[Minimize the distractions when upgrading]

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Time Matters® v10 Upgrade Check List & FAQ

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Why should I upgrade to version 10?

So you’ve signed up and paid for the AMP (Annual Maintenance Plan) but you haven’t taken advantage of the free version 10 (v10) upgrade. Why not? Maybe you aren’t aware of how this new version of Time Matters® version is different from past upgrades of the product.

I’ve been a CIC since version 2 and I’ve seen eight new major releases of Time Matters over the last 13 years. Like many clients, I’ve sometimes been frustrated by the race to add new features with little focus on solving existing problems that continued to annoy us all.

LexisNexis® is committed to breaking this cycle with the release of version 10. Lexis invested considerable resources to fix old annoyances for the v10 release, plus they plan to devote 1/3rd of all future development resources to resolving reported issues. Not only are many of our old frustrations fixed in the latest release, but future issues will be resolved quickly in new releases.

This is fantastic news for Time Matters users and CICs alike. But it’s only one reason to start planning your upgrade now. Version 10 includes just a few “new features” but unlike past versions most of these features offer value to nearly every user in every firm. One of the most obvious is the new enhanced Power Views which allow you to see important case details without opening a record. The other is the new Desktop

Extensions. Some have referred to Desktop Extensions as “Time Matters Lite” because they do offer easy access to important information. But while they are very fast and easy to use, Desktop Extensions are also surprisingly powerful. If you would like to learn more about these new features in v10 you are welcome to watch two short training videos on the Resources page of my Matters in Motion website.

If your firm currently uses the Professional version of Time Matters then v10 offers you the most exciting change. As a Pro user you may be familiar with possible database corruption and reindexing of the database. If you have never seen Time Matters Enterprise in operation you probably aren’t aware how much faster the SQL version can be if there is a large amount of information in your database.

The good news is with the release of v10, Lexis has decided to offer the power, speed and reliability of Enterprise to every user. Version 10 runs on the industry standard Microsoft SQL Server database. SQL is a powerful engine for reliably storing your firm and client’s information.

If you would like to learn more about the specifics of what makes Time Matters v10 the best Time Matters ever, please download my Dallas 2009 PMAC presentation, “**Leveraging the Latest New Features - What's New: Time Matters® version 10**” from the Resources page of my website [here](http://www.mattersinmotion.com):
<http://www.mattersinmotion.com>

Lexis took significant steps with version 10 to make your experience with the product more enjoyable and productive. As an experienced independent consultant, I believe upgrading to version 10 will be a positive move for your firm. You already have the AMP, so you access to v10. So what are you waiting for?

“OK, so v10 is great, but I’m nervous about the upgrade process...”

There are plenty of reasons you might be worried about taking that upgrade step. I’d like to list some of these and offer some rebuttals. Then I’ll offer some guidelines and tips to help make your upgrade process smooth and with little disruption to your firm.

“I’ve upgraded Time Matters before and usually end up with as many new bugs as they fixed. I’d rather stick with the Devil I know.”

That may have been true for previous versions, but remember how those old upgrades included many, many new features? Version 10 only includes 8 new features. That is because they spent so much time hunting down and killing bugs. I can assure you v10 is the most stable version of Time Matters since I’ve been an involved with the product.

“I’ve upgraded Time Matters before and I never really use any of the new features anyway. What’s the point?”

Version 10 only offers 8 new features. Some will be very valuable to any user, like the new Activity Power Views and Desktop Extensions. Some are things we have been requesting for years, like automated data backups – Finally!

“SQL makes v10 great for firms using Pro but I already have Enterprise. What will v10 do for me?”

While the v10 upgrade benefits to a firm running Pro are tremendous, that doesn't mean v10 isn't an important upgrade for firms running Enterprise. Remember Lexis put significant resources into making v10 the most bug free version of Time Matters ever. You will certainly benefit from a more reliable version of the software you depend on to run your firm.

Plus there are new features in v10 for everyone to get excited about. The enhanced Power Views and Desktop Extensions are great usability enhancements. They'll help you do your job faster with less effort. And the new automated backup feature was designed specifically with your SQL data in mind.

A less obvious v10 benefit to every Time Matters user is how one product line simplifies development for Lexis. Their commitment to do away with the weaker Pro database and move every firm to SQL helps ensure stability in future enhancements to the Time Matters product. One reason there are fewer bugs in this version, and there will continue to be fewer bugs in future versions, is the developers no longer have to maintain 2 versions simultaneously. Imagine the errors you would have if you tried to keep two slightly different versions of a complex pleading in sync. Now imagine that your pleading contains hundreds of thousands of lines of text. That is the battle the developers have been fighting – until v10.

“What will happen to my data if I upgrade? Isn't there a chance it could be lost or damaged?”

You should always run a backup before you upgrade. But that said, the v10 upgrade only *reads* your old data. It does not erase it, overwrite it, or even write to it at all. Your old data and even the old version of your program can stay in place and still operate after the upgrade. That means you can still run v9 or v8, etc to see your old data should you ever need to do so.

“My firm will have to be down during the upgrade. I can't afford any down time at all.”

As a small business owner myself I certainly understand this concern. But let's face it. You already have some downtime now, especially if you are using the Pro version. Plus that unexpected downtime never comes at a convenient time. You can and should plan your upgrade to happen at a time that is convenient for you. Schedule it for a day you will spend in court or on vacation. Or plan it for late in the day, the evening or even a weekend. Just be aware if you schedule it for off hours you won't have access to tech support. Once you take the time to upgrade to the more reliable v10, you can count on less painful, unexpected down time in the future.

“What if something goes wrong? Then my staff can't work and I'm in a big mess...”

Time Matters is a complex program and is critical to the operation of your firm. I'm certainly not going to say that the upgrade process is trivial. As a matter of fact unless you're confident your IT staff understands the inner workings of Time Matters you might want to consider hiring a CIC to help you. Repetition breeds accuracy and efficiency. Your IT staff may be able to figure out all the ins and outs of the upgrade process but this is likely to be their first and only v10 upgrade. Your CIC is no doubt working hard right now to schedule multiple v10 upgrades every week. CIC's know how to prepare and protect your data. What issues are likely to come up and how to quickly resolve them. And frankly after doing it 10 times we know how to do it quickly. All these lead to the least disruptive possible upgrade path for your firm.

“So maybe I hire a CIC to do the job. But still – what if something goes wrong?”

Understanding that a CIC knows better than anyone how to perform an upgrade without anything going wrong, I will admit sometimes the unexpected can strike. But by planning the order of steps in the upgrade you can avoid cutting the limb off that you are sitting on. Your CIC already understands these steps and is prepared to lead your firm through them while protecting you from the unexpected.

Here's a sample of what your CIC will take care of for you:

1. Plan the upgrade for a day and time that will be the least disruptive for your firm.
2. Verify that every PC in your office needs the [minimum v10 requirements](#).
3. Make sure all your PCs are in good working order and have all the latest Microsoft updates installed. Version 10 requires the free Microsoft .NET v3.5 update to be installed as a prerequisite. Do it before you schedule the actual Time Matters upgrade and you'll save considerable time.

4. Synchronize your remote office and laptop databases with the main database.
5. Synchronize your mobile phones and Outlook contacts with the main database.
6. Create and post any outstanding bills. Verify the status of any linked data to PC Law or other accounting program.
7. Prepare your data before the upgrade begins. For your Pro database, that means backup, reindex and back up again. If you have Enterprise, that means make a good backup of your SQL database.
8. Make sure you know the correct credentials to log onto your server and your SQL database before you start.
9. Upgrade Time Matters on your server first. You can install v10 on your server and even import the data from the old version without too much disruption in your office. Everyone will need to log out while the data is converted but that can typically be completed over the lunch hour. *(NOTE: This will take longer if you have a lot of email attachments.)* At that point you can run v10 on the server to verify your data looks good and everything works as expected. In the unlikely event that there are problems, the staff can continue to use the old version of Time Matters without disruption. You can easily import the old data again after the issue is resolved.
10. Understand the gotchas that might come up during the workstation upgrades, like antivirus software, conflicts with program links and the old version and so on.
11. Test and verify. Make sure the links to Word, Acrobat, Outlook, Excel, WordPerfect , etc. all operate on every PC.

I'll cover some of these items in more detail later in this document. The point is with proper planning and a thorough understanding of the process the v10 upgrade should be quick and uneventful.

“The AMP gives me free tech support. Can’t I just get a Lexis tech to do my upgrade?”

The Annual Maintenance Plan does provide free technical support. But technical support provides for helping with problems when something is broken, not installing software upgrades. There simply isn't enough technical support staff to install upgrades for the tens of thousands of firms using Time Matters. The upgrade requires planning and personalized attention to detail. The CIC program exists to provide this higher level of assistance to firms using Time Matters.

“It's been a bad year. I really can't afford to hire a CIC to do the upgrade right now.”

If you already have a valid AMP subscription you have already invested most of the cost required for the upgrade. The v10 software you've already paid for isn't providing you any value sitting on the shelf. As long as your network is stable and up-to-date, your CIC should be able to perform the upgrade for a very reasonable cost.

And remember, if you're still using the old version you're still living with the old problems. How much is it costing you in frustration and downtime to continue using your old version?

Hardware considerations

“I know SQL is supposed to be great, but I read that I would need a “real server” to run v10. I’m a small firm and don’t have (or can’t afford) a real server.”

There is a lot of the confusion over the requirement that the Time Matters v10 database be stored on a “server”. This is primarily a concern for smaller firms who either store their database on a secretaries PC or a network hard drive (NAS) device. So first I'd like to define some terms, and then explain my perspective on it. I'll wrap up by giving you a specific example of an inexpensive server/system my firm offers that we know will work well for a small law firm running TM v10. You are welcome to contact us, or your own CIC if you have one, with these specifications and prices.

The following are definitions for the purposes of this discussion. They are the terminology we use with our clients and may not line up exactly with Lexis'. But I assure you this will lead you to a working Time Matters v10 system.

When you say "Server" you could be referring to various things:

1. A "Real Server PC" (hardware) is a PC with special parts designed for high reliability and speed. For example a real server typically includes a RAID array of high speed & reliable disks, Error Correcting (ECC) RAM (memory), possibly even redundant power supplies.
2. A "Real Server OS" (software) is a server PC running an Operating System (OS) designed specifically to manage user accounts and security as well as many other advantages to a larger (6+) user firm. Examples of this are Windows 2000 Server (*too old for reason explained later*), Windows 2003 Server, Windows 2008 Server and Windows Small Business Server (SBS) in both 2003 & 2008 flavors.
3. A "Peer Server" is typically a PC that does not include the special fast/reliable hardware and is running a regular workstation OS like 2000, XP or Vista. By design, these workstation OSs lack the ability to manage remote user accounts and security so everyone must basically trust everyone else. This is not typically a problem in a small office. The other distinction **we** give to a "Peer Server" is that someone sits at that server/PC and uses it for daily work as everyone else in the office uses it for file storage, etc. This is almost always a bad idea. Each person in the office is draining the power from that one user sitting at the PC. Plus if that one user has a problem that requires a reboot or crashes the system, everyone in the office is affected. My company does not support this type of installation and I believe this is specifically what Lexis is saying they do not support with regards to v10. This kind of setup is common in a small firm running Pro and contributes to the frustrations with the Pro versions of Time Matters.
4. A "Dedicated Peer Server" is basically the exact same PC/OS as #3, but no one touches the PC. It is "dedicated" to the task of serving each remote user's file storage needs. This type of system will do a fine job hosting the free SQL Express that comes with TM v10 for a firm with 2-5 users. Beyond 5 users you should really consider moving to a Real Server for the many benefits they offer a larger office.

We have put together an estimate with specifications and pricing for a Dedicated Peer Server that we can recommend to a 2-5 user firm with Time Matters v10. We can configure this system for you then ship it to your office where you can unbox it and plug it in, ready to go. We can reach in with our remote support tools to connect your workstations to this server and you will be up and running very quickly. The system comes with multiple options for data backup and even a basic setup for Time Matters v10 if you wish. You are welcome to share this estimate with your own CIC if you work with one or with your local IT person. They should be able to provide a similar system.

You can download specifications and estimates for affordable Dedicated Peer Servers on the [Resources page](#) of my site.

I am very comfortable recommending this lower budget solution to a small firm. But if you have the budget, this is a good opportunity for you to move up the technology ladder and step into a real server. We can also help you with specifications and an estimate on a real server as well. But be careful not to spend the lion's share of your budget on a hardware update and miss out on the benefits a CIC can offer. Solid infrastructure is a must for a stable system, whether it is on a small budget or larger. But your firm and staff will see real tangible benefit from hiring a CIC to help you learn to use what TM offers to run your practice smoothly. You won't see much benefit from buying a server that's bigger than you really need.

“Do I have to buy Microsoft SQL Server? Isn't that expensive?”

Microsoft SQL Server Express is free and comes with Time Matters v10. Since it is their free version it's limited to using a maximum of 1GB of RAM (memory) on the server and limited to a maximum of 4GB for database (disk) storage. This might sound like a bad thing but really most 2-10 user firms will be fine with SQL Express for a very long time.

Typically, any small office with a large SQL database file likely has a problem with email attachments. Time Matters v10 includes the ability to automatically extract your e-mail attachments from a bloated database and save them outside SQL. This frees up considerable space in that 4GB limit, and allows most small firms to use the free version of SQL for many years. *(NOTE: Mark Deal, another CIC, offers an add-on for handling email attachments in Time Matters. His solution offers some enhanced capabilities and I recommend you consider it if you work with a lot of email attachments in your firm. Learn more at: <http://www.tmttools.net>.)*

If your firm ever does grow to the point where you need the full (purchased) version of Microsoft SQL, the upgrade from the free SQL Express to the paid version is easy to do. So there is little reason for a small firm to spend the money on full SQL now. Wait 2-7 years to see if you ever really need it.

NOTE: I strongly encourage you to periodically check your SQL database file size. If it does grow to the max (4GB) your Time Matters will hang because there is no room to store additional data.

“Will my version of Windows run Time Matters v10?”

Windows 2000 – The short answer here is no. Time Matters v10 requires the free Microsoft .NET v3.5 update. Unfortunately Windows 2000 (server or workstation) cannot run .NET 3.5, so Windows 2000 cannot run v10. 2000 was ten years ago. It's time to move on. *(NOTE: The same goes for Windows 95 and 98)*

Windows XP Professional – Works like a charm.

Windows XP Home - Hopefully the name says enough. Most tech people will rightfully discourage you from running XP 'Home' on your 'office' workstations. It is possible to use XP Home, but it requires some bubble gum and string and I do not recommend it. Life is too short. *Important: Don't try to run a peer server on XP Home. Again, it will lead to headaches.*

Vista - I personally don't have any trouble with Vista as a workstation OS. I would try to avoid using it as a peer server OS though. It requires too much tinkering to make it share freely with everyone on the network. I also don't think there is any reason to go down that path when you can still get a system with XP Pro - *if you purchase the PC from a reseller. XP is stable and will be around for a long while. (NOTE: Don't use the 'Home' version for your 'office' applies to Vista as well.)*

Windows 7 – With the SP1 release of v10 Lexis sanctioned Time Matters support for Windows 7. I know a number of people that are using v10 on Windows 7 and really like it. There are some new security enhancements in Windows 7 that interfere with a lot of programs including Time Matters. You can avoid some of these headaches by configuring your v10 shortcut with the “Run as Administrator” option on the compatibility tab.

I would avoid using Windows 7 as a peer server because it, like Vista Windows 7 includes Microsoft security enhancements that require extra tinkering. I'm not saying it can't be done. I'm just saying it's not as easy to set up as a Windows XP Professional dedicated peer server. *(NOTE: Don't use the 'Home' version for your 'office' applies to Windows 7 as well.)*

What should I do to prepare for my upgrade?

Make a Plan

Plan the upgrade for a day and time that will be the least disruptive for your firm. For a small firm you might expect it to take 1-2 hours on the server and 30-60 minutes on each workstation. That is assuming you already have a server in place. These are very loose ballpark estimates based on a smooth upgrade with no unexpected issues. These times may vary considerably based on your configuration. Your CIC and/or IT staff are qualified to examine your network and make an actual recommendation.

Make sure your equipment is ready

Verify that every PC in your office meets the [minimum v10 requirements](#). No PCs running Windows 95, 98 or 2000. Memory (RAM) is cheap these days. If your PC is running slow an inexpensive memory upgrade may help.

Make sure all your PCs are in good working order and have all the latest Microsoft updates installed. This one is very important. Version 10 requires the free Microsoft .NET v3.5 update to be installed as a prerequisite. Install the update before you schedule the actual Time Matters upgrade and you'll save considerable time. The v10 install will download and install .NET on each PC if necessary, but it's a big file and will add 20 minutes to an hour to the install time on each PC. If possible you can run the Windows Automatic Updates in the evening. Another option is to download the .NET v3.5 SP1 Full Package one time and install it on each your PCs from your server. Read more about .NET [here](#). Download the .NET v3.5 SP1 Full Package [here](#).

Pull in all your remote data

Synchronize your remote office and laptop databases with the main database. Pull all your data back to the central database before the conversion or your remote data will be lost.

Synchronize your mobile phones and Outlook contacts with the main database. Pull all your data back to the central database before the conversion or your remote data will be lost.

Take care of the books

Create and post any outstanding bills. Verify the status of any linked data to PCLaw or other accounting program.

Backup, reindex and backup again

Prepare your data before the upgrade begins. For Pro that means backup, reindex your database and back up again. After you reindex be sure to run your old version and spot check your data to be sure it looks like you expect. If there are problems contact support and be proud that you actually have a backup that you can restore.

If you have Enterprise, no reindex is necessary. Just make a good backup of your SQL database and then verify that you can find the .BAK file.

NOTE: Use the built in TM backup routine to backup your TM existing database. Click "File | Backup Time Matters"

Make sure you have the keys before you start the trip

Make sure you know the correct credentials to log onto your server and your SQL database before you start. Verify that you can log on to your server PC as an Administrator. If you are upgrading Pro make sure you know

how to get to your Time Matters data folder from the server console. If you are upgrading Enterprise make sure you know your SQL Instance name and logon credentials.

What tips can you offer for the actual upgrade process?

You should start by reviewing the "[TM Install Guide.pdf](#)" or "[LNTPA Install Guide.pdf](#)" provided by Lexis.

Upgrade Time Matters on the server PC first

NOTE: DO NOT attempt to upgrade your database from a workstation. You should be logged in and sitting at the actual server PC where the new v10 database is installed and the old version data is stored. You are asking for trouble if you try to convert your old database across the network.

You can install v10 on your server and even import the data from the old version without too much disruption in your office. Everyone will need to log out while the data is being converted but that can typically be completed over the lunch hour. (*NOTE: This can take considerably longer than an hour if you have a lot of email attachments.*) At that point you can run v10 on the server to verify your data looks good and everything works as expected. In the unlikely event that there are problems, the staff can continue to use the old version of Time Matters without disruption. You can easily import the old data again after the issue is resolved.

Leave the old version of Time Matters installed on the server until the entire upgrade process is complete. This gives you a safe fallback position just in case any unexpected issues come up.

If all goes well with the conversion on the server and everyone is still logged out of Time Matters on their workstations, you can proceed with the workstation upgrades.

Workstation PC upgrades

If you leave the old version of Time Matters on your workstations you run the risk of conflicts with the links to Microsoft Office, Acrobat, etc. So if v10 is running fine and your data looks good on the server, it's a good idea to uninstall the old version of Time Matters from each workstation before you install the workstation upgrade. This leaves very little risk of link conflicts between the old version and v10.

Once you uninstall the old version of Time Matters on the workstation, close all your applications and reboot each PC before you start the upgrade. Do not start any programs before you run the v10 upgrade.

Disable real time scanning on your antivirus software. Sometimes antivirus software interferes with the installation of software packages. Temporarily disable it to avoid potential problems.

Run task manager and kill the Acrotray.exe process before you start the install. Some versions of Acrobat leave the component (Acrotray.exe) running in memory all the time. This blocks Time Matters from installing the link to Acrobat and means you must go back and manually initiate the link later.

I prefer to copy the installation files from the server to a folder on each workstation PC. For example copy the setup folder from the server to C:\ on each workstation PC. Running the setup from files that are stored locally on each PC can save time and some headaches later.

During Installation I typically choose "Custom" then disable the Internet Explorer and Firefox links on the "Custom Setup" step. Most of my clients don't use these features and sometimes IE causes problems with Time Matters down the road.

What else should I do after the upgrade is complete?

Verify that your links to Outlook, Word, Acrobat and Word Perfect are connected to the v10 database and not reaching back to v9. The easy way to check this in Word, Excel and Acrobat is to click the "TM Open" link and check the bottom of the dialog for "TimeMatters10". Unfortunately there is no such trick to verify the Outlook link so you will have to save an email and go check TM v10 to verify it is actually there.

Be sure to delete any leftover shortcuts to the old version that might still be on your Desktop, Start menu or Quick Launch toolbar.

Take advantage of a new Activity Power View by setting it as the default for your Matters lists and possibly your Contacts list. Watch my short training video to learn more about this terrific new feature. Find it on the [Resources page](#) of my site.

Try out the new Desktop Extensions feature and see how easy they are to use. Watch my short training video to learn how surprisingly powerful these simple extensions actually are. Find it on the [Resources page](#) of my site.

Setup and use the new Scheduled Backup feature. I've posted a link to a "how to" video on the [Resources page](#) of my site. This video walks you step by step through all the SQL, BAT file and Windows Scheduler settings you need to make to protect your data.

I'm thrilled that Lexis finally added a scheduled SQL backup to Time Matters. But please be aware that having a SQL backup won't protect you from a disk failure if you don't also copy that back up to an alternate location. There are plenty of options for doing this reliably and inexpensively. There's really no excuse to risk your clients data and your business by not taking steps to protect yourself.

We recommend one or more external USB hard drives as backup media. They are fast, reliable, inexpensive and portable. They are a great option for on-site and off-site backup. Unlike tape you can easily verify or restore files from your backup. Plus you don't need a special tape drive or software to access your data. If disaster strikes simply plug your USB drive in to any PC. We specifically recommend Seagate brand USB hard drives because they offer a 5 year warranty. Other drive manufacturers typically offer a one year warranty, which says something to me about how long you can expect their equipment to last.

Another offsite backup option I recommend you consider is **Active Online Backup**, a super-secure Internet backup service designed to meet the needs of small firms generally and Time Matters users specifically. The company is run by Wells H. Anderson, an experienced LexisNexis CIC. The service differs from the rest of the pack in that it is much more secure, has no noticeable effect on server performance or your Internet connection, and yet is still affordable. <http://www.activeonlinebackup.com>

The changes in v10 open the door to exciting new possibilities for the product in the future as well as a more comfortable and dependable experience with Time Matters today.

I realize this document contains a lot of information. I hope it helps you better understand the value the services of a CIC can offer to your firm. I also hope it encourages you to follow through on the investment

you've probably already made on an Annual Maintenance Plan and move up to the latest and best version of Time Matters.

I or any other CIC would be happy to discuss your needs and concerns then work with you to find ways to practice law more effectively for your clients.

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