**ACTIVE PRACTICE**

How to change the directory (folder) used by Time Matters for storing documents

Moving Document Folders Used by Time Matters

If you are replacing the computer or drive storing the Document folders used by Time Matters, you will need to make some changes. On **every user computer**, you will need to change a setting in **Time Matters File Locations**.
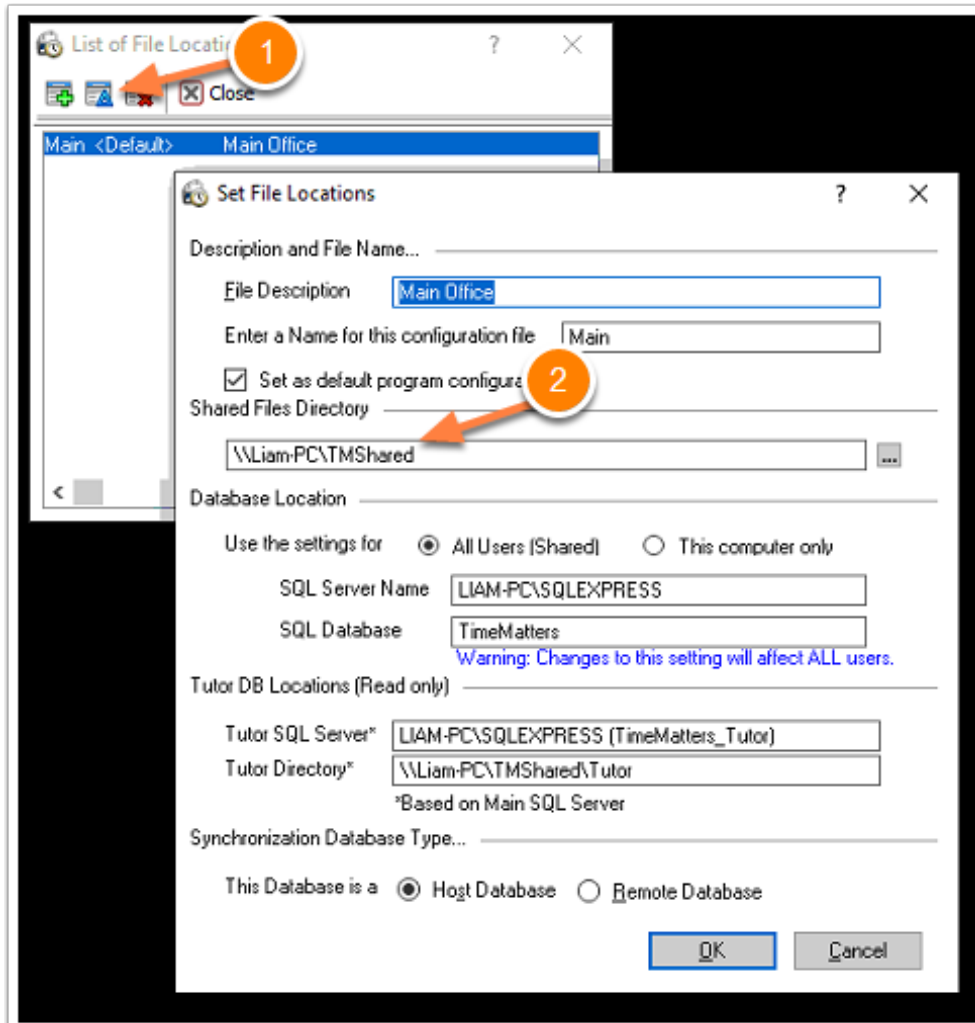
Open the Time Matters File Locations.
1. Press the Start button and type: **File loc**
2. Time Matters File Locations should appear. Right-click on **Time Matters File Locations**
3. **C**lick **Run As Administrator.**
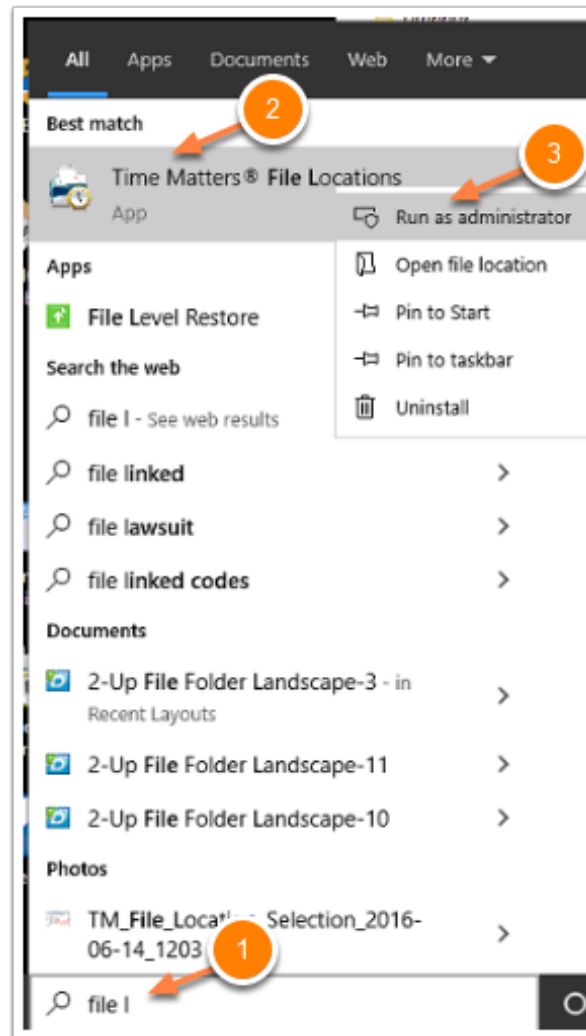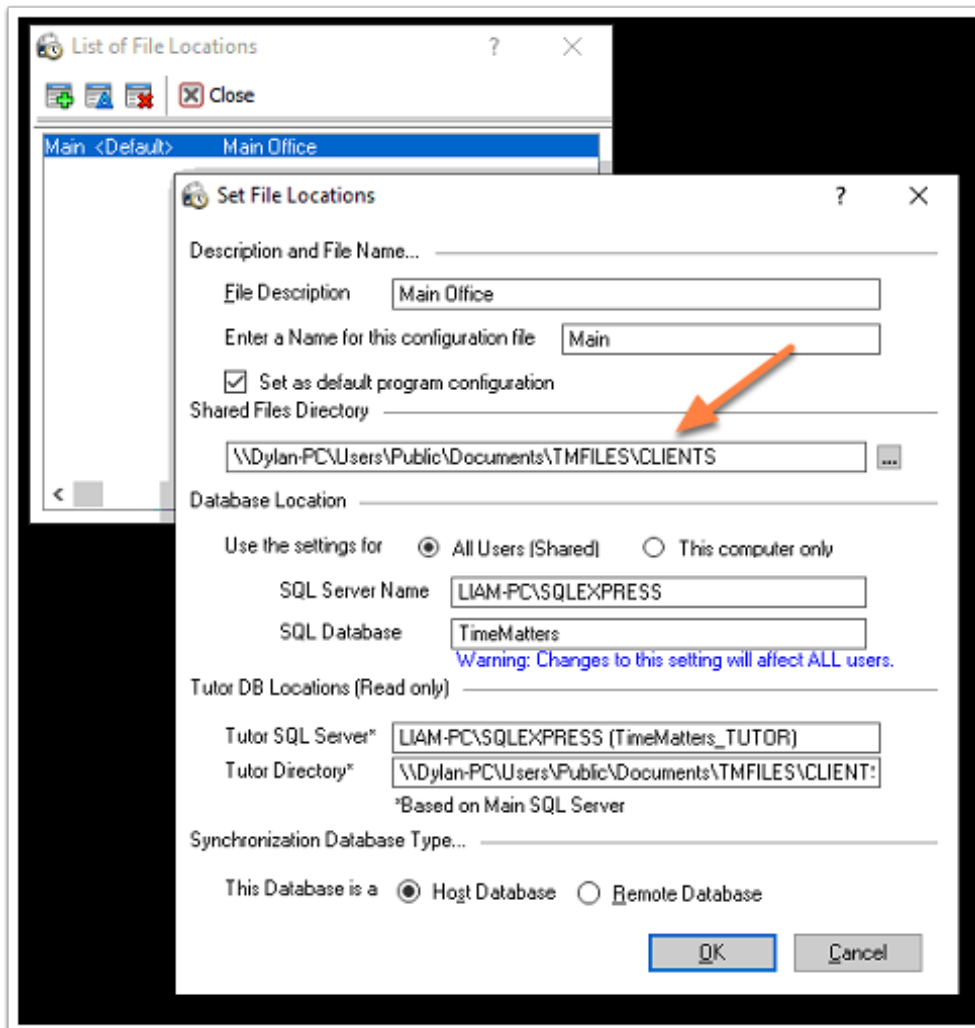
Open the Set File Locations Window

1. Click on the **Change Record** icon (blue triangle)
2. **Delete** the entry in the Shared Files Directory field.

Enter the New Shared Files Directory

Enter the path to the new Time Matters Shared Files Directory.

The Directory may be a folder in a local drive, mapped drive (e.g. F:) or a network drive using its UNC path as shown below.
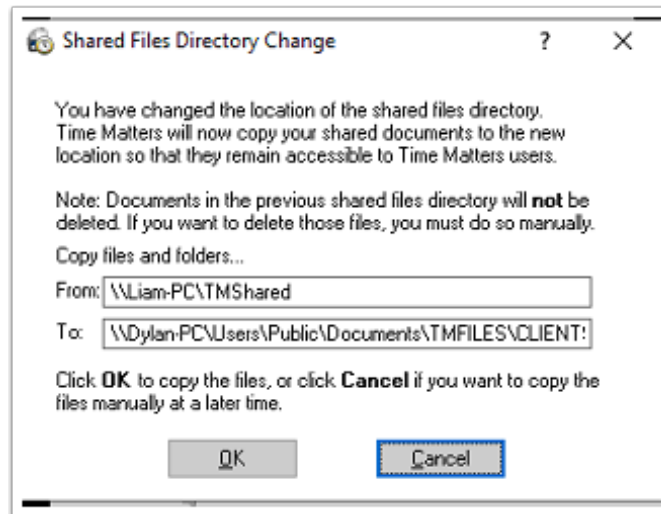
Cancel the Shared Files Directory Change

You will need to move the tree of folders from the old computer or drive to the new one.

But we recommend using a program like Robocopy (if you can master the options) or simply Windows File Explorer to move the folders.
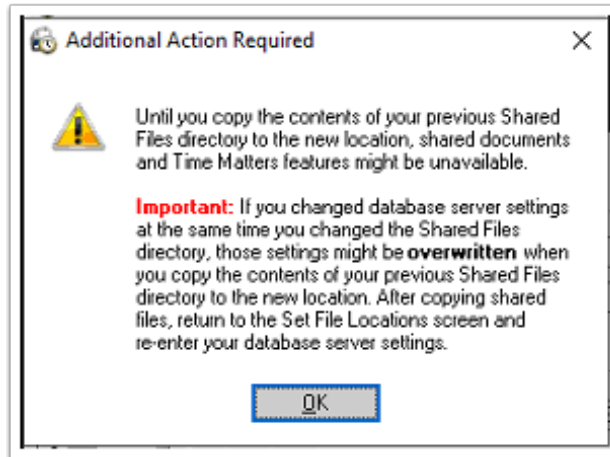
Press **Cancel** to close the Shared Files Directory window.

Click OK at the Additional Action Required Window

Click **OK**

That is all you need to do on each user PC.

Document AutoName Options Folder

Time Matters has two options for setting the location of the main folder where documents are stored:

A. Use Files Folder Specified in Time Matters Database Configuration File (actually the Time Matters File Locations window).

B. Use This Folder

Option A - Use Ampersand Notation

Time Matters can simplify the process of changing the location of Document folders. It has an option to use ampersand notation. The ampersand character (&) can be used automatically in the File Name field of Document records to represent the Time Matters Shared Files Directory.

If you have used Option A in the past, you won't need to update the the File Name field in all of the Document records in Time Matters. Otherwise, the File Names in all the Document records will need to be updated either with Main Menu / File / Utilites / Document Management / Document Paths (**Caution: Be careful with this utility!)** or with a SQL Server query that works much faster.

Ampersand notation keeps the File Names shorter and allows you to change where Time Matters stores documents without having to make a corresponding change to the File Name field of the Document records.

Option B - Use This Folder

This option allows you to specify a network share or network drive as the location for Documents saved by Time Matters.

With this option, you will need to change the File Name field in all of the existing Document records in Time Matters. They can be updated either with Main Menu / File / Utilites / Document Management / Document Paths (**Caution: Be careful with this utility!)** or with a SQL Server query that works much faster

The following two pages explain how to use Option A or Option B.

Document AutoName Options Folder

Options A - Use Ampersand Notation

Go to: Main Menu / File / Setup / General / Program Level. Then follow the 5 steps, below.

If you have used Option A, Ampersand Notation, in the past, you don't need to update the Document records in Time Matters. If you have not used Ampersand Notation before, and you switch to Option A, the File Names in all the Document records will need to be updated either with Main Menu / File / Utilites / Document Management / Document Paths (**Caution: Be careful with this utility!**) or with a SQL Server that works much faster.

Document AutoName Options Folder

Option B - Use This Folder

This option allows you to specify a network share or drive as the location for Documents saved by Time Matters.

Fill in the network path (e.g. \\ServerName\Folder Name) or a network drive letter (e.g. G: or G:\Folder Name) in **Step 5,** below. That will determine where all **new documents** are stored. You will need to use a SQL Query (fast!) or go to Main Menu / File / Utilites / Document Management / Document Paths to update all the existing Document records after moving them to their new location. That utility must be used very carefully!
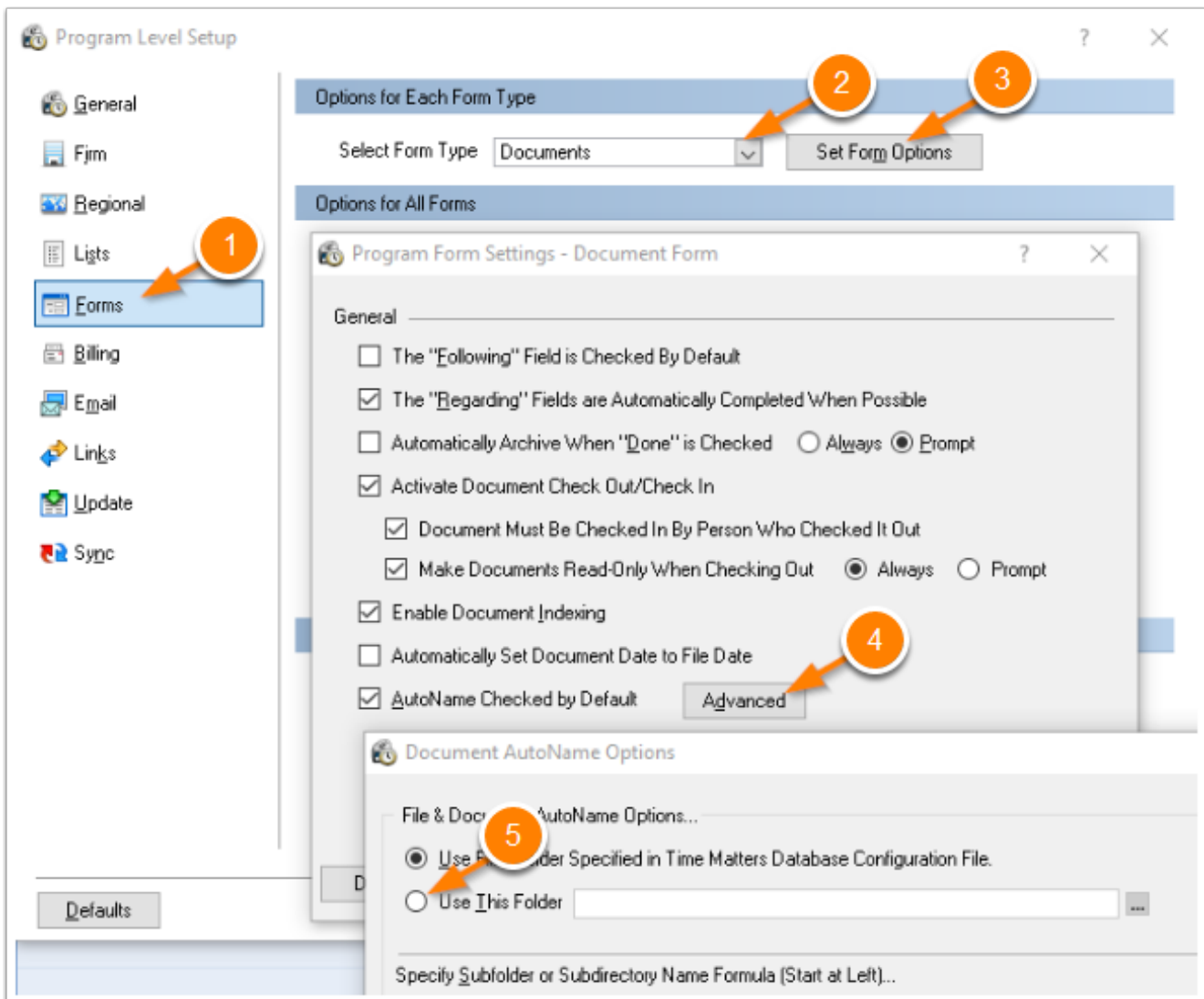
Moving Files from the Old Location to the New Location

In addition to making changes within the Time Matters settings, you need to move the actual document files from their old location to a new location.

You have multiple options for moving the document files:

- **Drag and Drop** - You can use Windows File Explorer to drag and drop and entire directory tree of files from one place to another. If the destination is on a different drive.File Explorer will **copy** the files. If on the same drive, it will **move** the files
- **Robocopy** - This free utility is included with Windows. It can **preserve folder dates** when copying files. It has a complex set of options and is run from the command prompt.
- **Time Matters Option** - You are given the opportunity copy files from the old location to the new location. On the page, above, entitled **Cancel the Shared Files Directory**, you could click **OK** and the file copying process would begin immediately. We believe it is a better practice to use another method of copying files.

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