

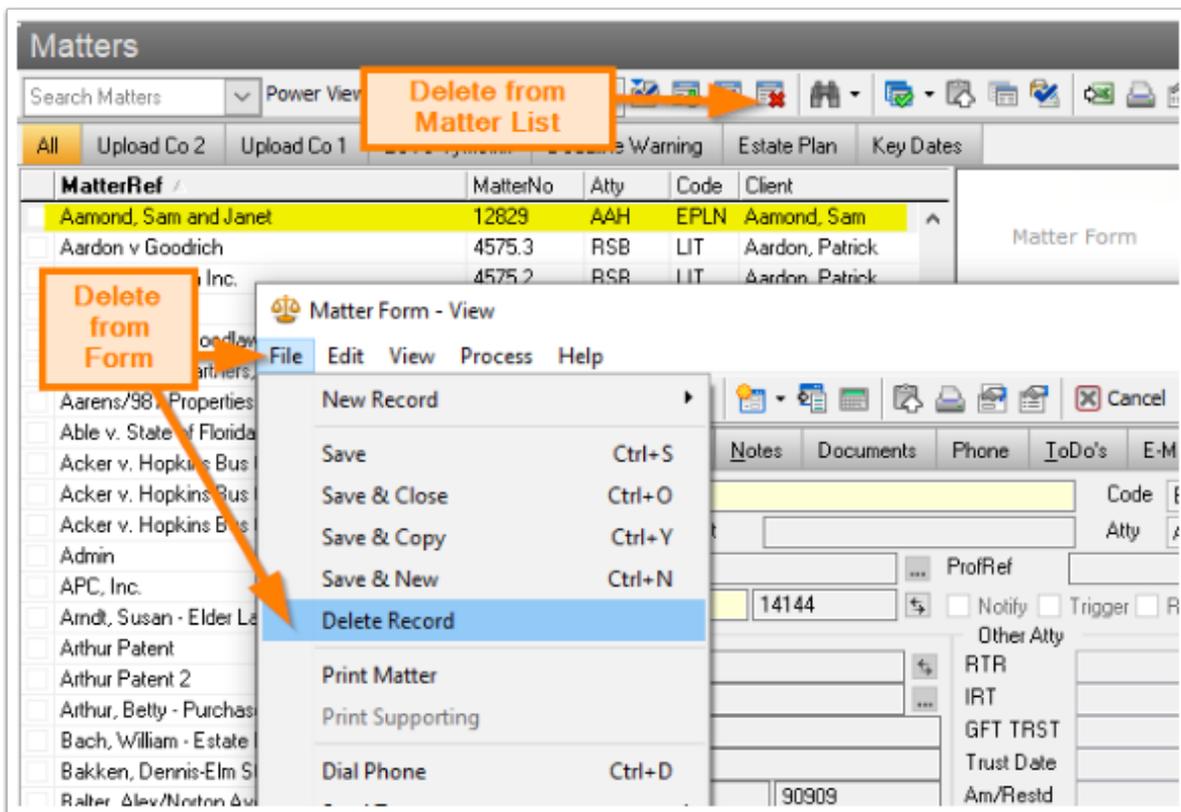
Security settings relating to archiving and deleting records

## Archiving and Deleting Matters

Sometimes it is necessary to delete a Matter, but not often. Typically it is best to archive a Matter rather than to delete it. Archiving places the Matter in an Archive List accessible from the File drop-down on the Time Matters Main Menu.

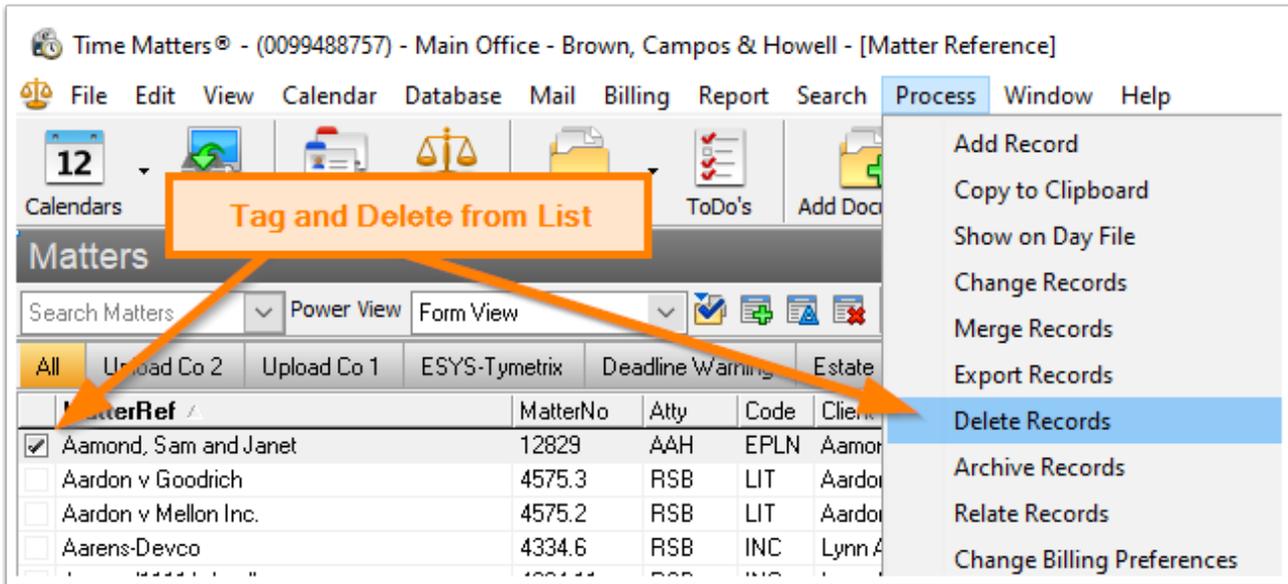
Unfortunately, to allow a user to archive a Matter, the user needs to have a Time Matters Security setting that allows deleting Matters. Users needing Archive rights need to be assigned Delete rights for Matters. These users should be warned about deleting Matters. (Fortunately, Time Matters has a Recycle Bin that allows restoring a deleted Matter, but that can be a slow process.) They should know and avoid the places where Matters may be deleted.

This screenshot shows how a Matter may be deleted by selecting it on the Matter List and pressing the Delete (red X) icon. It also shows how a Matter may be deleted from within a Matter Form.



## Deleting Multiple Matters

By tagging Matter records on the Matter List and using the Process menu, multiple Matters may be deleted.

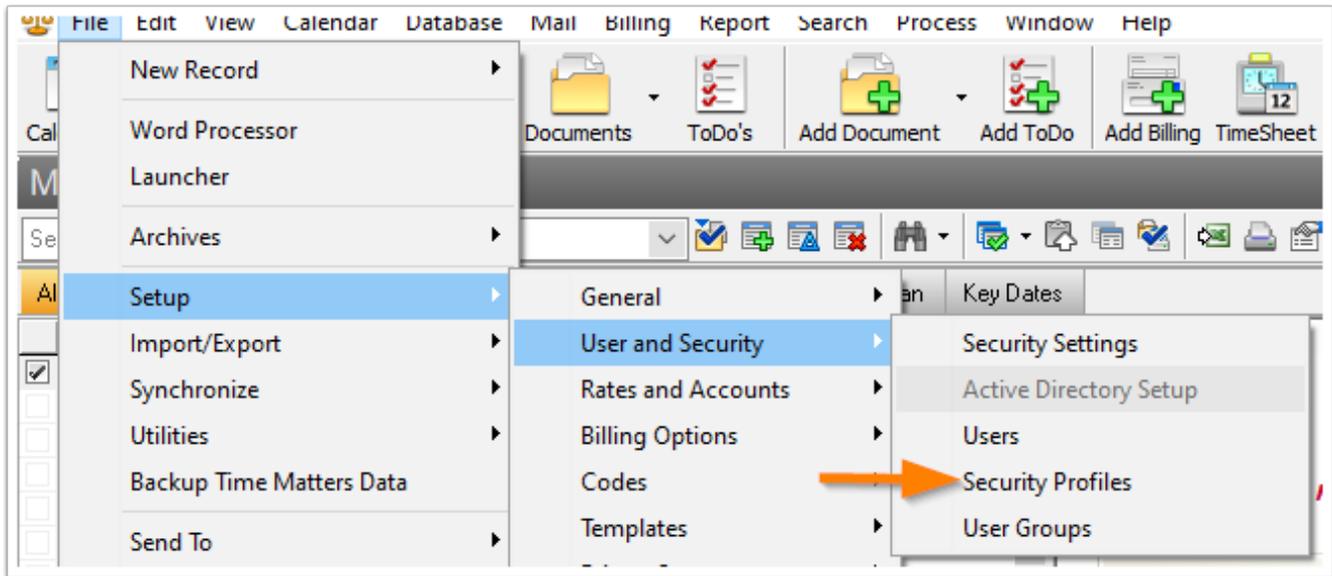


## Security Setting to Allow Deleting and Archiving

Typically Security Profiles are used to assign restrictions to multiple users.

To edit a Security Profile, go to:

Time Matters Main Menu / File / Setup / User and Security / Security Profiles



## Security Profile Setting to Prevent Matter Deletion

Normally users should be restricted from deleting Matters.

Go to each **Security Profile** where deletions should be restricted by:

1. Double-clicking the Profile
2. Click Overall Program Access
3. Click Fully Controlled Program Areas
4. Double-click the letter Y in the **Del** column opposite **Matter**

Of course, if you want users with a particular Profile to be able to delete and archive Matters, leave the setting as **Y**.

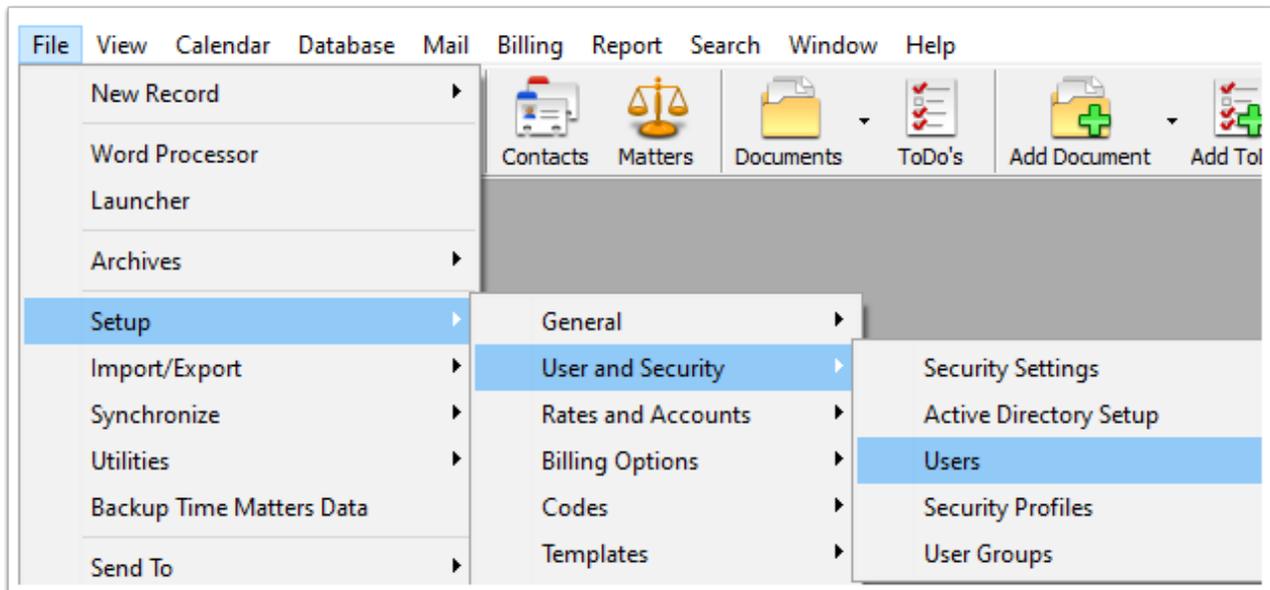
The screenshot shows the 'Security Setup - Security Profiles' application window. The 'Security Profile Setup' dialog is open, showing the 'Overall Program Access' tab. The 'Fully Controlled Program Areas' sub-tab is selected. A table displays access permissions for various program areas, categorized into 'Normal Records' and 'Private Records'. The 'Matter' row is highlighted, showing 'View', 'Add', and 'Chg' permissions as 'Y' and 'Del' as 'N' for both record types.

Program Area	Normal Records				Private Records			
	View	Add	Chg	Del	View	Add	Chg	Del
Event	Y	Y	Y	Y	N	N	N	N
ToDo	Y	Y	Y	Y	N	N	N	N
Contact	Y	Y	Y	Y	N	N	N	N
<b>Matter</b>	Y	Y	Y	<b>N</b>	N	N	N	N
Note	Y	Y	Y	Y	N	N	N	N
Document	Y	Y	Y	Y	N	N	N	N
Phone	Y	Y	Y	Y	N	N	N	N
Email	Y	Y	Y	Y	N	N	N	N
Web	Y	Y	Y	Y	N	N	N	N
Billing	Y	Y	Y	Y	N	N	N	N
Outline	Y	Y	Y	Y	N	N	N	N
Marketing	Y	Y	Y	Y	N	N	N	N
Insurance	Y	Y	Y	Y	N	N	N	N
Birthday	Y	Y	Y	Y	N	N	N	N
Issues	Y	Y	Y	Y	N	N	N	N

## Allowing a User to Archive and Delete Matters

Whether or not a user is assigned to a Security Profile, you may allow the user to archive and delete Matters by changing a setting for the user.

Go to: Time Matters Main Menu / File / Setup / User and Security / Users



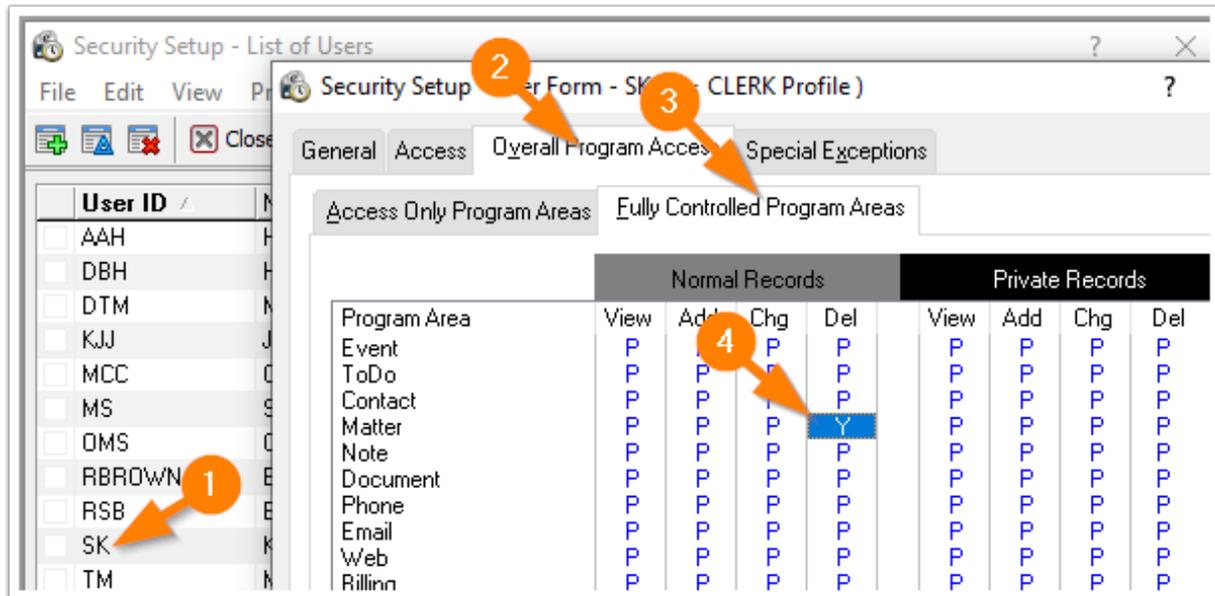
## Security Setup for User

1. Double-click the user.
2. Select: Overall Program Access.
3. Select: Fully Controlled Program Areas
4. Double-click the cell in the **Del** column opposite **Matter** until the letter **Y** appears.

This technique works whether the settings are all **P** or all **N**.

For users assigned to a Security Profile, this setting overrides it.

For users with individual Security Settings, this setting also applies.



## Author

Wells H. Anderson, CEO

Active Practice LLC - [www.activepractice.com](http://www.activepractice.com)

Edina, Minnesota

952.922.1727 or 800.575.0007

Expert assistance with practice management applications

PCLaw|Time Matters Platinum Certified Partner

SecureMyFirm - [www.securemyfirm.com](http://www.securemyfirm.com)

A service of Active Online Inc.

952.922.1120 or 888.922.1120

Protecting small firms from computer disasters