

TITLE – Calendars, Contacts & Cases: What software is right for you?

AUTHOR – Alicia A. Slade

PUBLICATION – Pennsylvania Family Lawyer

ISSUE / DATE – February 2009

For the past 20 years, I have been providing technical consulting services to law offices. I remember in the late 1980's, early 1990's, how I had to convince attorneys why they needed a personal computer (pc) system. Well today, it is much different. An attorney understands why they need to have a pc and they also understand that the software that they use is extremely important and will help them to service their clients. Over the years, attorneys have implemented word processing software, time billing software, and accounting software for their law practice. They also have Internet access and email. Within the past few years, attorneys have added or have thought about adding software for calendaring, contacts, cases, and the ability to sync this information to a smartphone. Software that does calendaring and shares contacts helps the attorney and their staff to be on the same page. Analyzing the different software options for these tasks can be difficult and confusing. One choice is to use MS Outlook for these functions and another option is to use a practice management software program, such as LexisNexis Time Matters. (There are several practice management software applications, but for the sake of space in this article, I will focus on the features of Time Matters for comparison. All of the practice management software programs are similar in their capabilities.)

Microsoft (MS) Outlook is a component within the MS Office Suite. Most offices use MS Outlook as an email client to send/receive emails. MS Outlook also has an address book for contacts and a calendar for events and tasks (todo's). There is no relationship between the contacts and the calendar when you use MS Outlook. For example, if you go to a contact you cannot see all of the calendar items or emails for that contact. MS Outlook is a flat database software program and there are no relationships. MS Outlook has an add-on called MS Business Contact Manager. MS Business Contact Manager creates relationships between the contact records within MS Outlook. Contact records can be associated with calendar events, tasks, emails, notes, and documents. So, when you look at a contact record, you can go into history and look at the other record types that are associated with it.

If you want to share the MS Outlook calendar and contacts with other attorneys and staff, then you need a MS Exchange Server. A MS Exchange Server provides the back end engine so that calendars and contact lists can be shared by different individuals in the office. A MS Outlook user gives rights to who can see their calendar and contacts. MS Outlook can also be synchronized with a smartphone. The benefit is to have access to emails, calendar, and contact information when you are out of the office. If you have a MS Exchange Server, as you and your staff make changes to contacts and calendars, the changes will be synchronized wirelessly from the office to the smartphone device and vice versa. Depending upon the smartphone device, other software may be needed for the out of the office wireless synchronization, such as a Blackberry Enterprise Server (BES) or Blackberry Enterprise Server Express Edition. Corporations use MS Outlook because users need only contact and calendars.

Time Matters Practice Management Software tracks many different types of information: contacts, calendar events, todo's, cases, notes, documents, emails, phone calls, and more. If you use Time Matters, MS Outlook can be used for email, and emails can be linked to the cases within Time Matters. Time Matters is a relational software program. A case or contact can be linked/related to many events, todo's, emails, notes, documents, and more. As information is entered into Time Matters and linked to a case record, it creates an automatic timeline. When you look at a case, you can see the different related record types and also a timeline for the records. If you schedule an event on multiple calendars and the date changes, you change the date once and it will change on all of the calendars. Rather than having to find the case file in the office to look at calendaring information for the case, or what emails have been sent/received, or what documents have been sent/received, attorneys and staff can look at the case in Time Matters and see everything pertaining to it. You can see what attorney is working on a case, how many cases an attorney has, what different types of cases there are, and much more.

Time Matters synchronizes with smartphones. The contact, case, and calendar information is synchronized to the smartphone for use outside of the office. An attorney can select just their calendar,

contacts, and cases to synchronize to the smartphone. Time Matters Enterprise Edition can be synchronized with MS Exchange Server and information is synchronized wirelessly so that smartphones are updated automatically. Time Matters is also customizable. All record types have user defined fields. User defined fields can be created for information that you want to collect. For example, on a case, you may want to collect file open date, file closed date, referral source, county, judge, and more. On the case record, fields can be defined to collect this information. All information collected can be merged onto merge documents in Word or WordPerfect; such as, letters, envelopes, fax cover sheets, pleadings, and other word processing documents. The data is entered once and can be used many times.

If you have basic calendaring and contact needs, then you should consider using MS Outlook. However, if you want to track contacts, cases, events and todo's and have other capabilities, then practice management software is the right choice for you.

*Alicia A. Slade is the President of Plummer Slade, Inc., a computer networking firm specializing in providing computer networking and business solutions to law offices since 1988.*