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# PIMs Help Win the Organization Battle

WHILE YOU SIT at your desk, the phone rings and your computer “answers” it. Using caller ID, it shows who is calling, opens their file and directs the call to the attorney handling their case. To refresh your memory while you’re talking, you review a record of earlier calls with the person or see all previous calls with anyone on the file. With one click, you can create a call-back reminder or do a time entry for the call. You don’t have to type anything; the software program fills in the details. This is an example of how some case management software programs are beginning to automate the administrative details of your cases.

Many of the procedural and administrative functions of practicing law can be easily organized and automated using case management and personal information manager (PIM) software. They include functions such as timekeeping, document assembly, docketing, calendaring and address books. There is no

clear line of demarcation between these two categories. Many functions are contained in both types of software. This “integration” will continue because their objective is to manage case, procedural and administrative legal information together.

Case management software varies in functions provided, but they all manage case information. It is generally thought of as managing the procedural and administrative—not the litigation—part of your cases. For example, the user can track court due dates and identify cases that are nearing time limitations. Case management is intended to eliminate many of the repetitive input tasks inherent in case management processes. Information such as a client’s name can be “shared” with a document management program, word processor and other programs.


A PIM program is designed to organize case and personal information, such as names, phone numbers, addresses, calendar and court dates, to-do lists and time and billing information. PIMs can be generic programs such as Microsoft Outlook™ or legal-specific programs such as Amicus Attorney™. The PIM program you select should have the capability to share information easily with your favorite word processing program to eliminate reentering common case data for pleadings, correspondence and other legal materials.

Remember that the functions of these two types of programs are beginning to be integrated, so it is difficult to categorize them as

case management as opposed to PIM software. Here are just a few of the functions to consider:

- *Calendar, appointments, to-do list or task manager*—Does it have a calendar, reminders, contact address and phone directory and to-do lists and prioritization? Does it have bring-forward capability and group calendaring capability?
- *Name and address book*—Can they be searched and integrated with your word processor?
- *Telephone dialing and call tracking*—Does it have caller ID capability to identify and automatically open the client’s case file? Will it dial your client’s number for you and automatically create a time entry and call record?
- *Case information tracking capability*—Does it track by case number, name, client, date opened or present status? Does it have case activity checks? Can you attach notes and scanned documents to the case file?
- *Document assembly*—Does it “integrate” easily with your word processor program to create form documents?

Application service providers—which provide software and data on the Internet—are beginning to offer these programs. For example, Jurisdiction USA ([www.jdusa.net](http://www.jdusa.net)) hosts online case management, calendaring, document management, time and billing, legal research and encrypted e-mail.

Case management and PIM software programs are essential to automate your case functions and administrative functions. They can increase your efficiency and provide a low-cost means to track your activity. 

## Finding PIMs on the Web

### Amicus Attorney™

[www.amicusattorney.com](http://www.amicusattorney.com)

### Time Matters for Windows™

[www.timematters.com](http://www.timematters.com)

### Microsoft Outlook™

[www.microsoft.com](http://www.microsoft.com)

### GroupWise™

[www.novell.com](http://www.novell.com)

### 21st Century Lawyer™

[www.21stcenturylawyer.com](http://www.21stcenturylawyer.com)

### Goldmine™

[www.goldminesw.com](http://www.goldminesw.com)

### Maximizer™

[www.maximizer.com](http://www.maximizer.com)

### Case Master III™

[www.stilegal.com](http://www.stilegal.com)

### Act!™ – Symantec

[www.symantec.com](http://www.symantec.com)

### ProLaw™

[www.prolaw.com](http://www.prolaw.com)

### Pins™ and Needles™

[www.needpins.com](http://www.needpins.com)

### Lotus Organizer™

[www.lotus.com](http://www.lotus.com)

### LawBase™ Case Management

**System 6.0** [www.lawbase.com](http://www.lawbase.com)

### Abacus

[www.abacuslaw.com](http://www.abacuslaw.com)

### Complaw™

[www.complaw.com](http://www.complaw.com)

## MANAGEMENT SYSTEMS PRIMER

For an excellent book on case management systems, consider *Computerized Case Management Systems: Choosing and Implementing the Right Software for You*, by Andrew Z. Adkins III. Available at [www.abanet.org/lpm2/catalog/511-0409.html](http://www.abanet.org/lpm2/catalog/511-0409.html).