

# PRACTICE MANAGEMENT

# FACE-OFF



## Time Matters vs. Amicus Attorney

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Practice Management Face-Off:  
Time Matters vs. Amicus Attorney

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Each line, above, is a hot-link that takes you to the related section in the electronic version of this document. Web addresses throughout are active links to sites on the Internet.

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Wells Anderson tailors Time Matters practice management software, trains staff, and implements new technologies for law offices. He is President of Active Practice LLC in Edina, Minnesota, USA. His firm develops Time Matters and Billing Matters training materials for attorneys and staff and feature packages for major practice areas. Using remote control and conferencing technologies across the Internet, Anderson performs installations, conducts individual and group training sessions, and provides support to clients throughout North America.

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Guide for the Solo Lawyer, 3rd edition (ABA), Law Office Procedures Manual for Solos and Small Firms, 2nd edition (ABA), Managing Your Law Firm (CLE-BC), Annual Review of Law and Practice (1998-2003) (CLE-BC) and his own: Amicus Attorney in One Hour for Lawyers (ABA). He is a contributing author and past member of the Editorial Advisory Board for Law Technology News, published by American Lawyer Media Inc and for Law Practice Management Magazine, published by the ABA (his article co-written with Reid Trautz entitled Ten Sure Ways to Fail for Law Practice Management magazine was awarded one of "The Best Articles Published by the ABA" by the GP-Solo Magazine in September 2003). Dave is a prolific writer on practice management and has written for many publications including Law Office Computing, ABA's GP-Solo Magazine and Law Practice Magazine, the Canadian Bar Association's The National Magazine and others. Dave is a regular columnist for the CBA (PracticeTalk), the TLABC (Technology), the LSBC (Practice Tips) and The Lawyers Weekly (Focus on Technology).

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DAN PINNINGTON ([dan.pinnington@lawpro.ca](mailto:dan.pinnington@lawpro.ca)) is Director, practicePRO, at the Lawyer's Professional Indemnity Company (LAWPRO). LAWPRO ([www.LawPRO.ca](http://www.LawPRO.ca)) is the malpractice insurer for 20,000 lawyers in private practice in Ontario. practicePRO ([www.practicepro.ca](http://www.practicepro.ca)) is LAWPRO's innovative change and risk management initiative. Its goal is preventing claims. It provides lawyers with tools and resources to assist them in incorporating risk management strategies into their practices, including the use of technology. Prior to joining LAWPRO Dan practised for seven years in the Litigation Department of a Niagara Falls area law firm. Dan has advanced technology skills, and for several years also held the Manager of Information Systems position at his firm. Dan is well known in legal technology circles, and writes regular and occasional articles on legal technology for several legal and general publications. Dan has presented at ABA Techshow in Chicago, The Pacific Legal Technology Conference, the LegalTech and Technology for Lawyers conferences in Toronto, the Law Society of Upper Canada's Bar Admission Course, and many other CLE conferences. Dan is Chair of the Ontario Bar Association Law Practice Management Section, is Vice-Chair of the OBA Technology Committee, and is on the executive of the OBA Solo, Small Firm and General Practice Section. He is Secretary to the Canadian Bar Association Law Practice Management and Technology Section. He is also on ABA 2004 Techshow Board and the Practice Management Advisors and Core Web Committees of the American Bar Association Law Practice Management Section. He is a past president of The Canadian Society for the Advancement of Legal Technology.

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Ms. Thornwell is a Certified Consultant for Timeslips, Amicus Attorney, ABACUS Law, Time Matters, Billing Matters, TABS 3, PracticeMaster, and PC Law legal software. She also consults and trains on a number of other legal and general business software applications.

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She is a frequent local and national presenter and writer on legal technology and practice management topics. She regularly contributes to the Georgia Bar Journal; the Law Practice Management Program's departmental newsletters, and other national, ABA and state bar publications.

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## **Practice Management Face-Off: Time Matters vs. Amicus Attorney**

By Wells H. Anderson, David J. Bilinsky,  
Daniel E. Pinnington and Natalie Thornwell

### **Session Description**

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Practice management software goes far beyond its case management roots: it is now the killer software application. Take control of your time and practice with this powerful tool. Practice management software helps you better serve and communicate with your clients, and complete all tasks necessary to handle legal matters and manage a law office. It can also help you avoid malpractice claims. See a side-by-side comparison of two of the more widely used case management products handling four common tasks. Regardless of which practice management product you ultimately use, this session will demonstrate why you can't afford not to use it.



# Introduction

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Practice management software should be operating as the central nervous system in every law office or legal department. Why? Quite simply, because there is no better way to supercharge your practice or department by putting all the key information on every matter at the fingertips of every lawyer and staff person in the office. This software will make your office or department more profitable by making everyone more effective and efficient. As an added bonus, it can help prevent common errors and mistakes, including those that can lead to malpractice claims.

The presentation for this session will feature a side-by-side live demonstration of how two widely used practice management products handle four common series of law practice related tasks. These task scenarios are as follows:

1. Taking a call from potential client, checking for a conflict of interest, getting basic information and scheduling a meeting;
2. Using document assembly to generate an initial client meeting confirmation letter to the new client, and docketing the time to do this;
3. Receiving an e-mail document from a client, filing the document in the matter, checking the status of the matter and responding to email, and docketing time; and
4. Showing the routine lawyers go through at the start of a new day in terms of reviewing deadlines, limitations, outstanding communications and to-do's.

This paper covers what is presented in the session, including screen shots showing in detail what you would see as you complete these four task scenarios.

## Practice Management Products Compared

The two case management products demonstrated in this session are:

- Versions V+ and X of **Amicus Attorney** by Gavel and Gown Software ([www.amicusattorney.com](http://www.amicusattorney.com)). Version V+ has just recently been released and is an upgrade to the traditional Windows line of Amicus Attorney (comprising the Organizer, Advanced and Client-Server versions). Version X is a new version that runs within Internet Explorer. In this paper we will deal with Version V+, as that is the version that is being used by the vast majority of users.
- Version 6.0 of **Time Matters** ([www.timematters.com](http://www.timematters.com)) by DATA.TXT Corporation. The screenshots in this paper are of Version 5.0. Version 6.0 include a BlackBerry® link, an easy to use Outliner/Case Planner,



a whole new level of Outlook® integration including background AutoSync, and more. Click [here](#) for a list of key improvements.

These two products were chosen for the face-off demonstration as they are currently the two most widely used case management products in the legal profession. This is not meant to be an endorsement of either of these products relative to the dozens of other similar products that are available; rather it is intended to give session attendees an idea of the features and abilities of practice management software.

Other popular practice management products include:

- Prolaw or Prolaw Ready (for smaller firms) ([www.prolaw.com/](http://www.prolaw.com/))
- PracticeMaster ([www.practicemaster.com/](http://www.practicemaster.com/)) from the makers of Tabs3
- Client Profiles ([www.clientprofiles.com](http://www.clientprofiles.com)) an integrated legal accounting and practice management system.
- Computer Law Systems, Inc. ([www.clssummit.com](http://www.clssummit.com))
- Corprasoft ([www.corprasoft.com](http://www.corprasoft.com)) – Corporate Law Departments
- LawStream ([www.lawstream.com](http://www.lawstream.com)) – an integrated legal accounting and practice management system.
- LAWTRAC ([www.lawtrac.com](http://www.lawtrac.com)) – Corporate Law Departments
- Legal Easy, Inc. Attorney's Assistant ([www.legaleasy.com](http://www.legaleasy.com)) – Family Law Office Suite
- Legal Files ([www.legalfiles.com/](http://www.legalfiles.com/))
- Lextranet ([www.lextranet.com](http://www.lextranet.com)) – Web-based litigation support and case management
- Needles ([www.needleslaw.com](http://www.needleslaw.com))
- PCLaw ([www.pclaw.com](http://www.pclaw.com)) – this is a legal accounting system that has added practice management features in their latest version 7.
- Perfect Law ([www.perfectlaw.com](http://www.perfectlaw.com))
- RealLegal Practice Manager ([www.reallegal.com](http://www.reallegal.com))

Study the examples and features covered in the presentation and these materials as aids that help you focus on how practice management applications might improve the productivity of your office. To discover more about the competing products, visit the vendor websites and the Technology for Lawyers exhibits.

Practice management products have each has grown and expanded their scope – partly as a result of the intense competition among them. Some see the environment as one of co-opetition: all users of practice management software products stand to benefit when products integrate as much as possible with other common software applications such as accounting

systems, document managers, document automation systems and the like so that practice management software products as a class become the nerve centers of a lawyers' desktops. The continual leapfrogging in new developments, the introduction of customer-requested additions, the enhanced abilities offered by new operating systems – all of these and more have allowed the practice management applications to continue to grow and to offer more and more features and functionality to practicing lawyers.

The Major Premise of this paper is that there is never one product that is best for all situations – each practice manager on the market has its own strengths and weaknesses. What is important is to evaluate each of the products in light of your practice and determine the best choice for you. While the core functionality of all practice management products is essentially the same, their features vary a great deal. They have very different screen interfaces, require different network hardware and software configurations, and vary in the other software products they interface or link with, a key factor with respect to accounting and billing. Ultimately anyone looking to purchase practice management software should carefully review the available products to determine which one best suits their individual needs.

Following the task comparison, we summarize Amicus Attorney and Time Matters, looking at issues such as cost, versions available and other comparison data.

Finally, there is a detailed discussion of how to select and implement practice management software.

## **Practice Management Software - The Basics**

This section of the paper reviews some basic background information about practice management software.

Practice management software, originally called case management software, is a powerful tool for bringing efficiency to any size law practice or legal department. While it got its start in the world of litigators, hence the original "case management" label, practice management software has evolved to the point that it is for everyone, litigator and solicitor alike, and is equally useful for those in corporate legal departments.

There are many lawyers using Microsoft Outlook for e-mail, and a significant portion of those lawyers also use it for contact management or as a calendar. While Outlook is a reasonably good general-purpose personal information manager, it is not specifically designed for use as a law practice management tool. It is contact centric, not matter centric. Lawyers work and think in terms of matters. There are several excellent case or practice management programs specifically designed to help lawyers manage their law practices. These programs are matter centric, not contact centric.

Ultimately anyone using Outlook should seriously look at moving to one of the law office specific practice management products.

Practice management programs are more than fancy calendars, with collections of e-mails and addresses. They have evolved into complex "practice management systems" that contain, in one database, almost all the information you need to run your law practice. When used properly, a case management program unifies all the data about a client, potential client or matter into a single point of reference. What this means for the practitioner is the ability to draw relations between events and information gathered over long periods of time by matter, documents or people, and bring them to bear on a particular issue or matter in an instant.

For example, Time Matters uses the metaphor of a time-line. From the time-line tab on a particular matter, the entire history of a particular matter can be viewed. The time-line displays all billing, email, notes, phone calls, documents created, documents scanned, legal research, events, and to dos (open and completed), showing the state of these items, who did the work, how long it took, and when it was done. See Task 3 at page 49 for the [Timeline](#). Other information pertaining to a matter or contact can be viewed through the related tab.

Amicus Attorney presents all matter information using the metaphor of a traditional paper-based calendar and contact book. You can easily see this from the screenshots of Amicus Attorney throughout the paper.

The ability to quickly identify all of the people related to a given matter, to review the history of e-mail communications and notes related to that matter, to view all of the past and upcoming events and deadlines, brings a high degree of efficiency to these necessary if mundane tasks. The status of a given matter can be assessed with a few clicks of a pointing device, without the need to find and review a physical file.

For those willing to put more effort into customizing a particular application the rewards can be even greater. Practice management programs can be customized to create rules based scheduling. For example, when a matter has been set for trial, the program can calculate all of the case management deadlines based on the trial date. Changing a "contact" record from a potential client to a client code can launch a word processing application, prepare an engagement letter and even a first set of draft documents for a particular type of client.

Most of the practice management programs allow for quick and easy synchronization of the information hosted on the office server with a remote version of the program run off the network while away from the office. Taking a synchronized data set on a laptop computer generally provides far more case management information than can be synched to a personal digital assistant. Of course, you can still synchronize to a PDA if the laptop

is too bulky to carry. Many of the practice management products now have Web versions that give you full access across the Web through a Web browser to all information, just as if you were sitting at your desk.

Not only can case management software help you better manage your practice and be more profitable, it can help minimize the chance of a malpractice claim. To understand why this is so, here is a quick review of the most common types of mistakes that lawyers make - it is not a failure to know or apply the law.

## The Types of Errors Lawyers Make

Chart 1 - Comparison of Claim Count,  
by Description of Loss, 1989-2003



Chart 1 contains claims count percentages by description of loss for the Lawyers' Professional Indemnity Company ([LAWPRO](#)). LAWPRO is the sole provider of professional malpractice coverage to lawyers in the province of Ontario. Ontario lawyers in private practice are required to have professional malpractice coverage. Malpractice errors in the US have a similar distribution.

At the end of 2003 there were about 20,000 lawyers in private practice in the province. The claims represented in Chart 1 occurred over a 14-year

period, from 1989-2003. These claims number in the thousands and represent many millions in dollars of claims costs. Under the LAWPRO program, all claims are categorized with a description of loss representing the type of error that was made. From this information it becomes apparent where the common mistakes are being made.

Most lawyers are surprised to learn that a failure to know or apply the law only accounts for about 7% of malpractice errors.

The most common error is a failure to follow client's instructions, which accounts for almost 23% of errors. This description of loss category is perhaps a bit of a catchall for other types of errors. However, in essence, on these matters it was unclear as to what instructions were given or not given by a client. These types of claims usually occur because there are no notes in the lawyer's file and/or no letter to the client confirming instructions, and the client's recollection is different than the lawyer's recollection as to what was said or done.

The second biggest cause of claims is procrastination. It accounts for just over 15% of the errors that occurred. The predominance of this type of claim is not a surprise to most lawyers - it is human nature.

The next three most common types of errors are conflict of interest/acting for more than one party, failure to calendar, and poor communication with client, respectively at approximately 9%, 8% and 7%. Notwithstanding that they are easily preventable, together these three errors account for almost 25% of LAWPRO's claims portfolio.

The most common malpractice errors share a number of common characteristics relevant to the discussion in this paper. In particular, they are all easily preventable through the use of practice management software.

## Face-Off: Handling Common Tasks

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These are the tasks we ask the spotlighted practice management products, Time Matters and Amicus Attorney, to perform:

### **1. Initial Contact with a Client**

Taking a call from potential client, checking for a conflict of interest, getting basic information and scheduling a meeting

### **2. Send a Letter**

Using document assembly to generate an initial client meeting confirmation letter to the new client, and docketing the time to do this

### **3. Respond to a Client Email**

Receiving an e-mail document from a client, filing the document in the matter, checking the status of the matter and responding to email, and docketing time

### **4. Start a New Day**

Showing the routine lawyers go through at the start of a new day in terms of reviewing deadlines, limitations, outstanding communications and to-do's

In the ensuing pages, you will see step-by-step, illustrated descriptions of how lawyers and staff can accomplish these tasks aided by Time Matters, Amicus Attorney and other applications to which they link.

## TASK 1 – Initial Contact with a Client

### Take a call from a potential client, check for conflicts and schedule a meeting

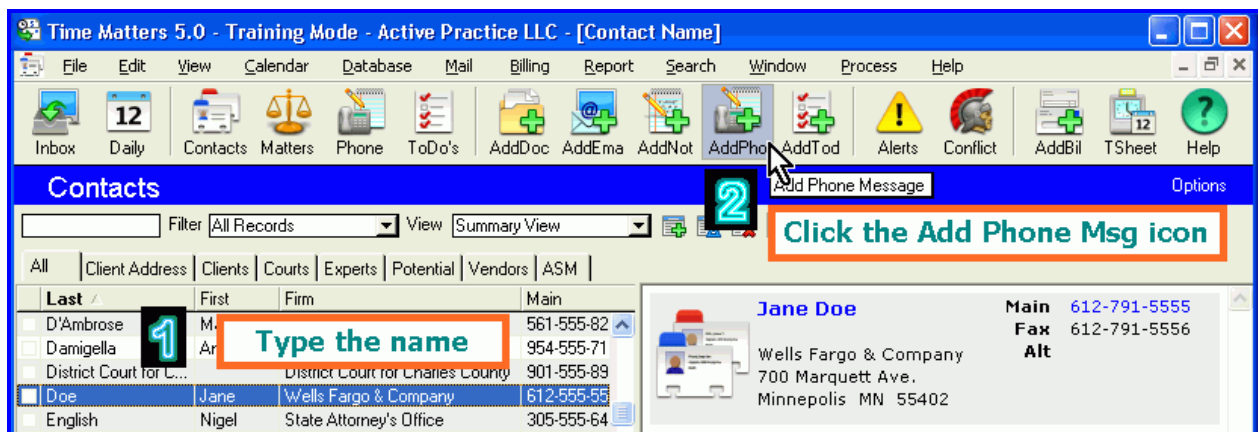
This is a basic function that is performed in law offices hundreds of times a day. Failure to pick up on a conflict of interest can result in the disqualification of a firm from continuing to act on a current file – potentially costing the firm not only thousands of dollars but also resulting in the loss of a client and gaining the firm an ethical violation in the process.

Accordingly, any practice management product must be able to surface potential conflicts quickly and easily – hopefully before matters progress beyond the disqualification point. Here is how both Amicus Attorney and Time Matters would handle this task:

### Task 1 – Time Matters:

#### Assistant takes a call from a prospect

The assistant in our example, Allison Monroe, starts with the Contact List on her screen. When she answers a phone call from Jane Doe, Allison just starts typing the last name.



(1) At the Contacts list, Allison begins typing the caller's name. Instantly Jane Doe's name is highlighted. (2) Allison clicks the Add Phone Message icon.



**Phone Call - Add**

File Edit View Process Help

Save & Close Save Delete Cancel

1 Date: 1/15/2004 Thu Time: 10:52am Code: PCLIPntnl Client

Subject: Staff: CNF Conference, EXP Expert, FCL From Clients, FLU Follow Up, INFO Info Request, INV Investigator, OPC Opp Cnsl, ORDR OrderParts, PCL Pntnl Client, PER Personal

Regarding: Jane Doe

In From: Phone1: Phone2:

Reminders: Follow Done Notify Hide Trigger

Send To: ASM From: ASM

Message: Phone Call -

2 Read Unread Personal Hold Urgent On Hold

3 Memo

**Choose a Code**

The Phone Call form pops up. (3) Allison selects a **Code** that best describes the type of Phone call. Choosing PCLI for Potential Client automatically causes several other fields to fill in.

**Phone Call - Add**

File Edit View Process Help

Save & Close Save Delete Cancel

1 Date: 1/15/2004 Thu Time: 11:15am Code: PCLIPntnl Client

Subject: Potential Client Staff: ASM|Allison S. Monroe

Regarding: Jane Doe

In From: Jane Doe Wells Fargo & Company To: RSB

Phone1: 612-555-5555 Phone2: 612-555-5556 Phone3:

Reminders: Follow Done Notify Hide Trigger Review Billable Private

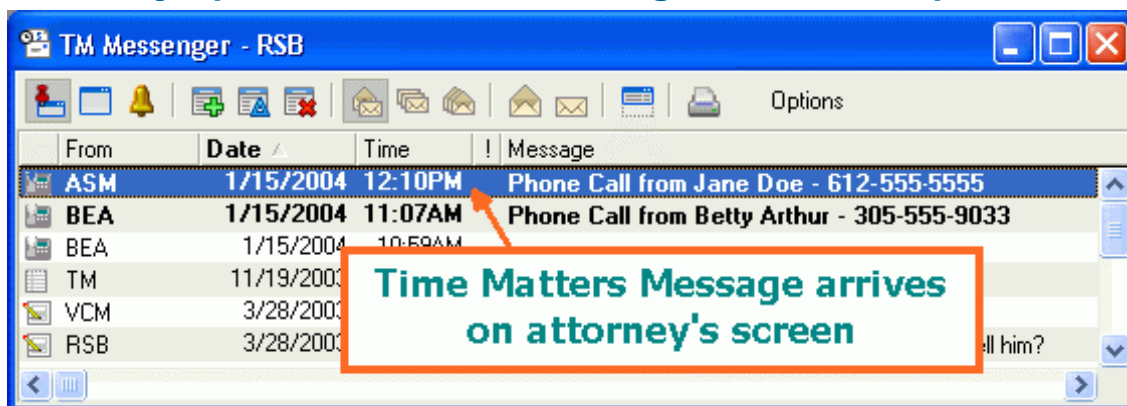
Send To: RSB From: ASM

Message: Phone Call from Jane Doe - 612-555-5555

**Select who the call is In From and whom it is To**

(4) Allison selects Jane Doe's name from a pop-up list in the **In From** field and (5) types the initials of the person to whom the call was made, RSB, in the **To** field. Based on these two entries, the rest of the Phone message fills in automatically with Jane's company, phone numbers, and a Time Matters Message for RSB, the attorney Jane Doe was calling. Allison saves the Phone Call record and it is automatically sent to the attorney, Robert S. Brown, with a Time Matters Message.

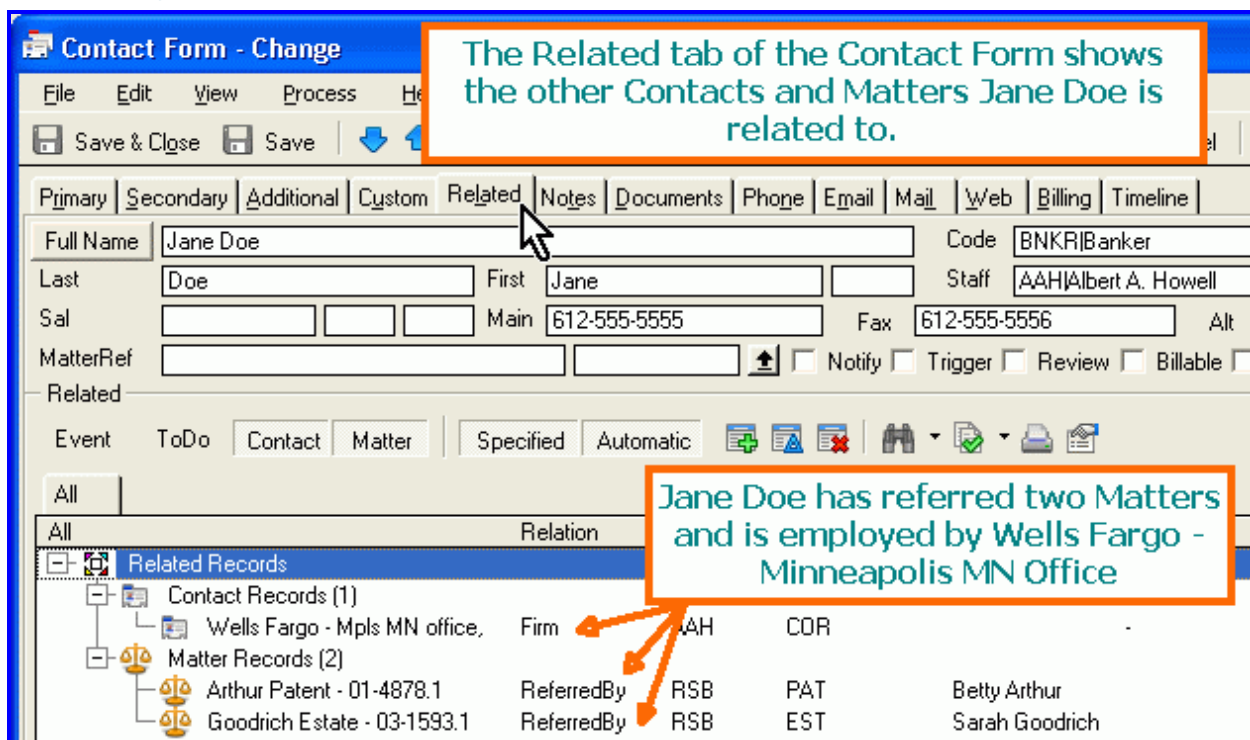
## Attorney opens the Phone message and looks up the caller



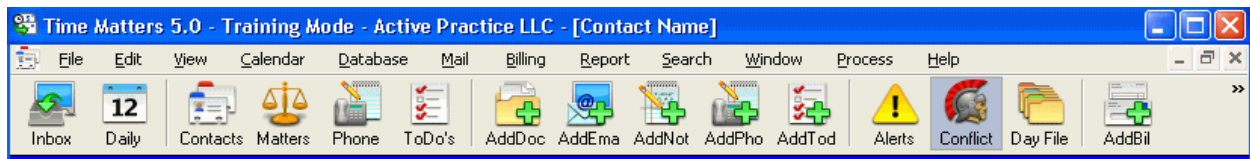
Robert S. Brown, the attorney Jane called, receives a Time Matters Message. This message window can be set to pop up when a new message arrives so Robert will not miss an important message. He double-clicks it to open it.

Robert sees on the message that Jane Doe has called as a potential new client. He opens up her Contact record in Time Matters to see what information the firm has about her.

## Attorney checks for conflicts



Based on Jane Doe's employment information and her status as someone who has referred business to the firm, Robert sees no apparent conflict of interest. But to be sure, he runs a comprehensive Conflicts Search covering all the information that has ever been entered into Time Matters excluding what has been specially flagged as Private.



Robert clicks on the Conflict button to bring up the Conflict Search window.

**Conflict of Interest - Global Search**

### Enter Search Name or Text

Each Record will be searched for a match with the Name or Text entered below. This will be a "direct character" match search. Enter as few characters as possible that are still most likely to be unique to the Record(s). Generally, it is better to not use multiple Words or Names since even small variations can cause the match search to fail and a Record to be missed.

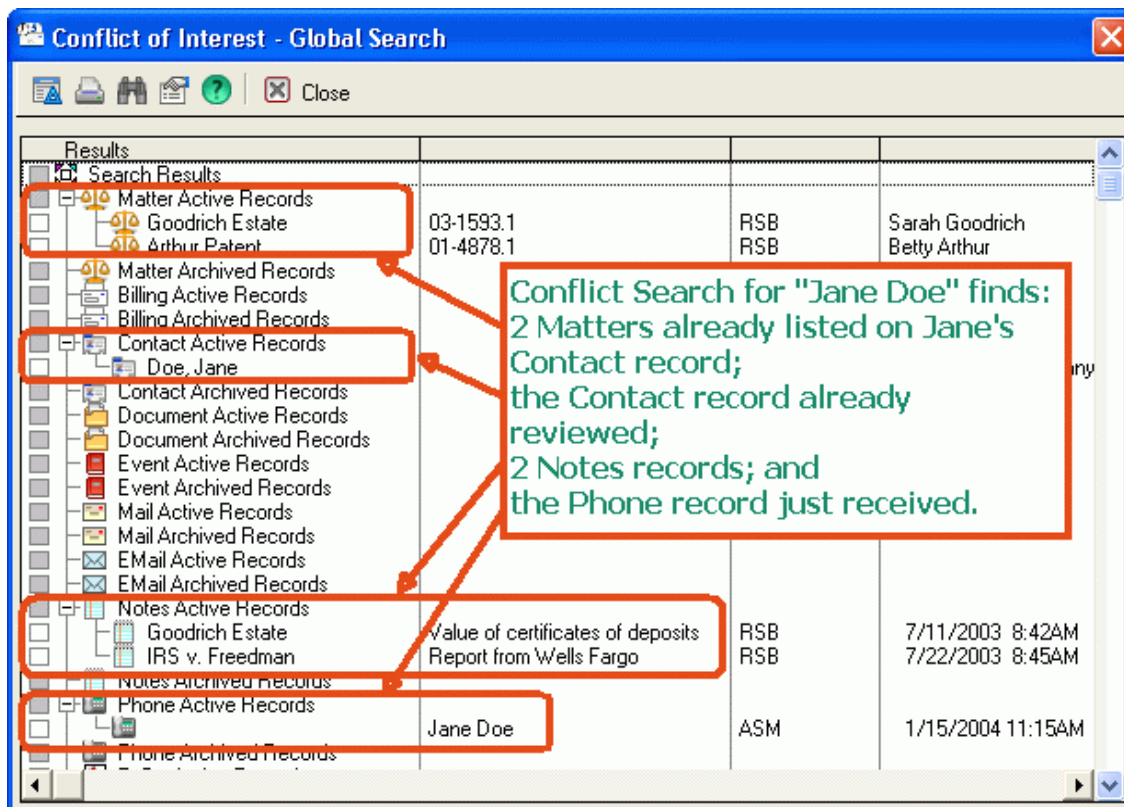
This approach will tend to error on the side of finding Records rather than missing them, which is valuable to a Global Search.

Name or Text

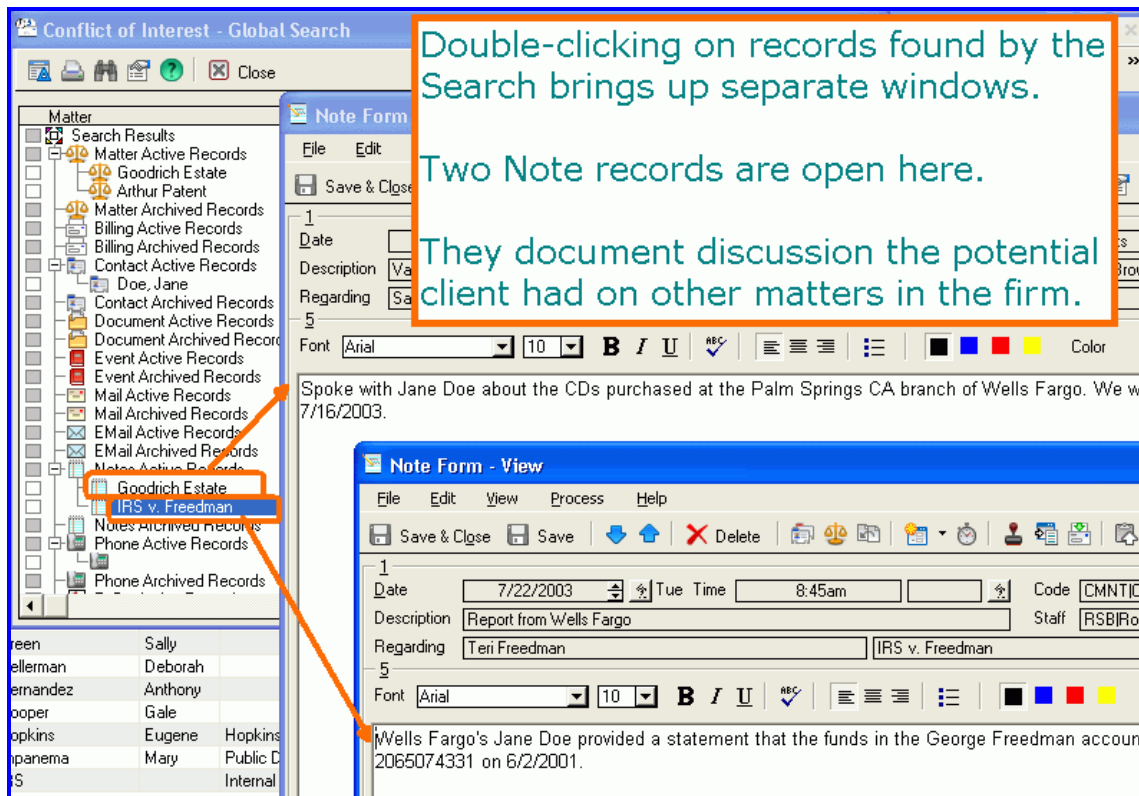
[Advanced](#)

[Help](#) [< Back](#) [Next >](#) [Cancel](#)

After clicking through the first windows, Robert types "Jane Doe" into the **Name or Text** field. The search can be refined using the Advanced button, which supports and/or searches, "sounds like" searches, and keyword searches.



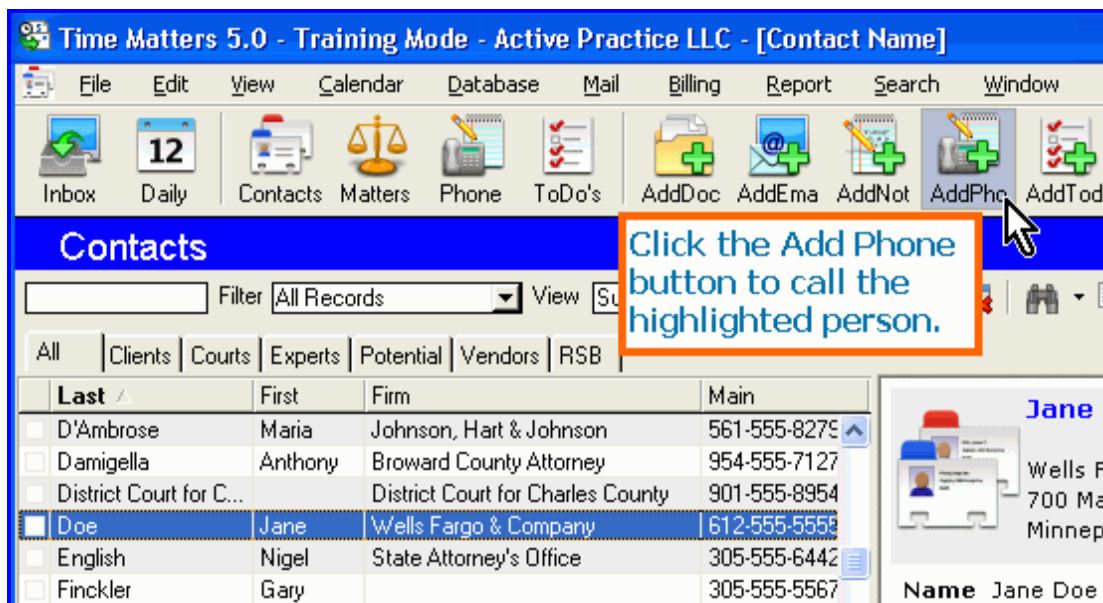
Robert double-clicks on each Note record to check for any problems.



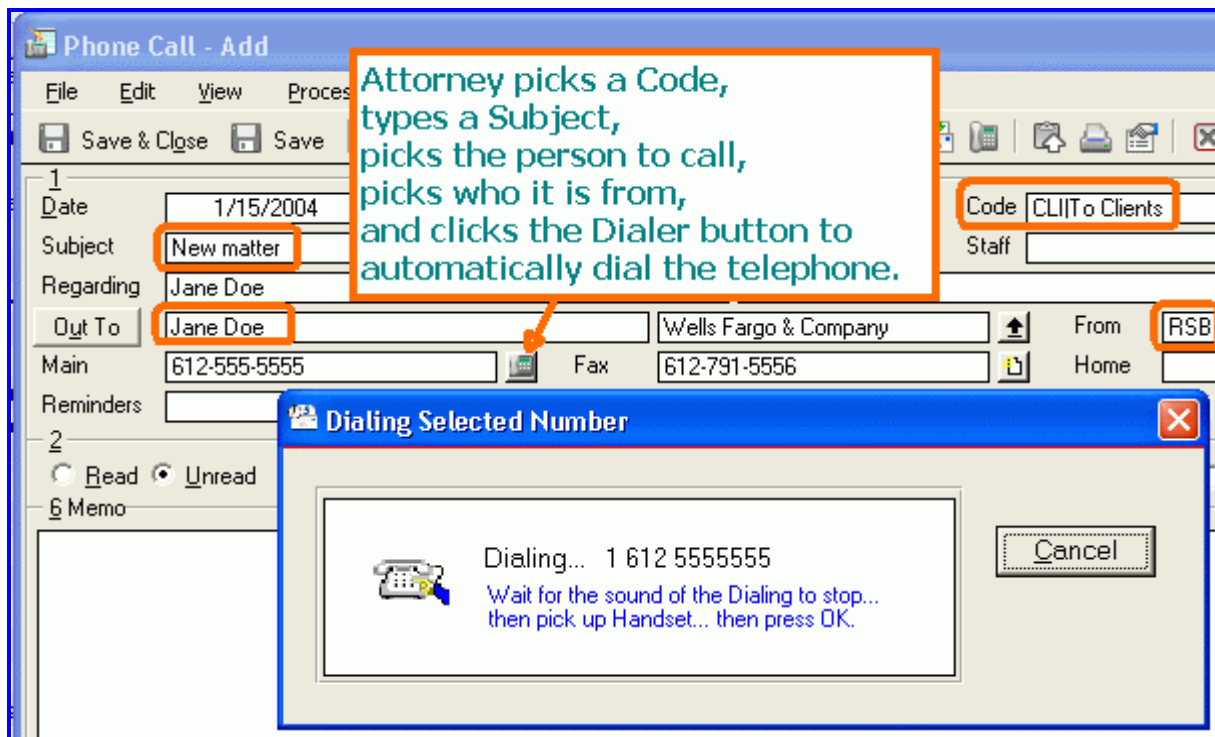
Neither of the two Notes suggests any basis for a conflict of interest, so Robert calls the prospective client, Jane Doe.

### Attorney calls and schedules a meeting

The Contacts list is again visible and Jane Doe's record is still highlighted, so Robert clicks on the Add Phone record button to start a call to Jane Doe.



A Phone Form appears. Robert fills it in and clicks the Dialer button.



After Time Matters dials the phone, Robert talks to Jane Doe making notes of the call on a scratch pad. When done, he summarizes the important facts

from the call in the Memo section of the Phone record, marks it Done, then clicks Save & Close.

Jane Doe agreed to meet with Robert five days later, so Robert asks an assistant to enter the appointment with his new client in the Calendar. Allison highlights Jane Doe on the Contact list, then clicks on the Add Event button to bring up an **Event Form** with Jane's name already filled in.

**Event Form - Change**

File Edit View Process Help

Save & Close Save Delete

Primary Custom Related Notes Documents Phone Email Mail Billing

Date: 1/20/2004 Tue Time: 2:00pm-2:45pm 0.75 Code: INIT|Initial Mtg

Description: Initial meeting with client Staff: RSB|Robert S. Brown

Regarding: Jane Doe

Reminders: 7.1

☐ Follow ☐ Done ☐ Notify ☐ Hide ☐ Trigger ☐ Review ☐ Billable ☐ Private

Fill in just the Start Time and the Code for Initial Mtg. All the other fields fill in automatically

## Event Form

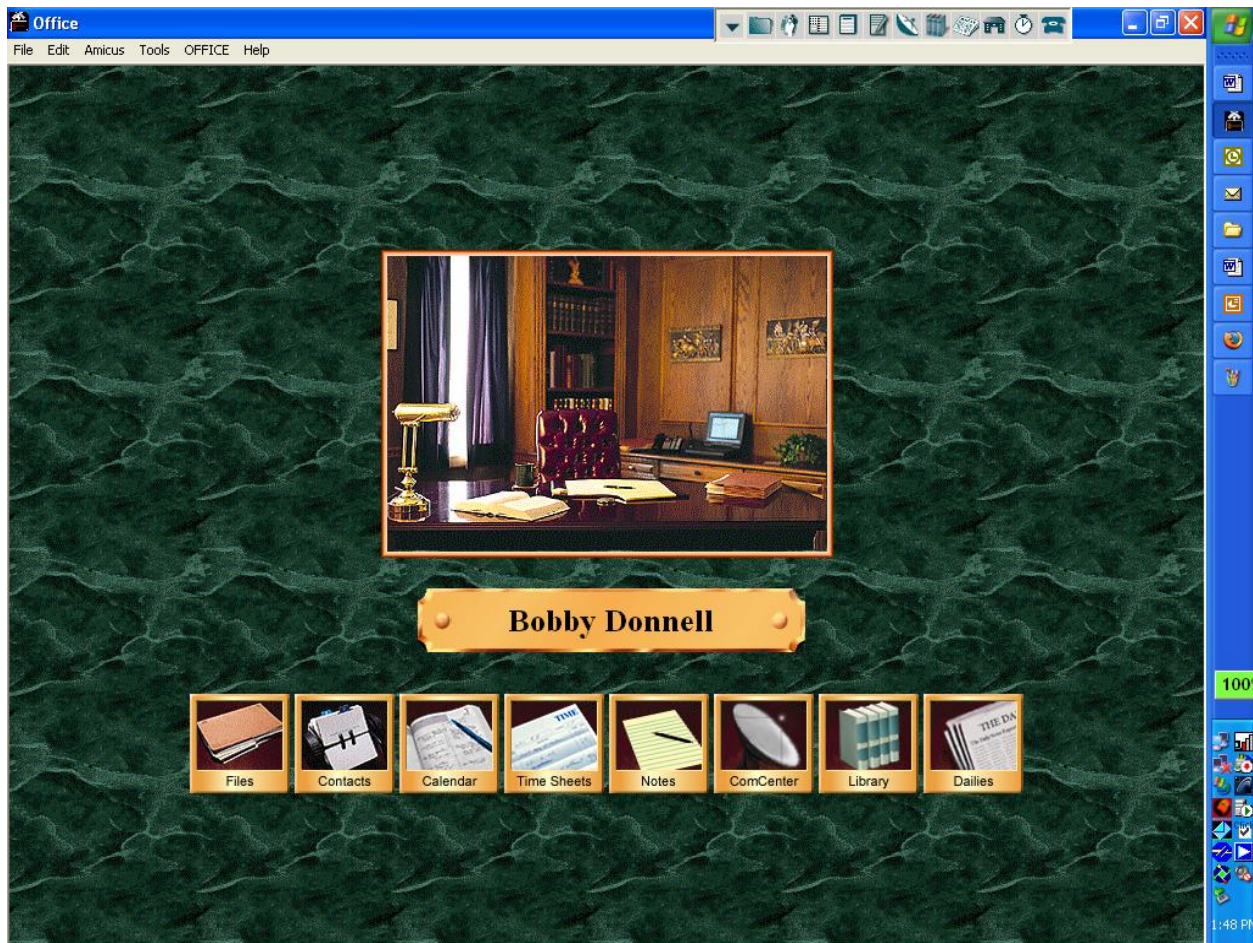
Time Matters tracks the flow of communications within an office. It helps to ensure that phone messages are routed and handled. It checks for conflicts of interest, dials the phone, and records important notes on each call.



## Task 1 – Amicus Attorney:

This section will highlight the new version of Amicus Attorney V+

When you first start Amicus Attorney (“AA”) version V+, you will see the following:



If you are familiar with Amicus Attorney V, you will notice a new icon has been added – the Notes icon. Otherwise the Office Screen and toolbar appear similar to the Office and toolbar in prior versions of Amicus Attorney.

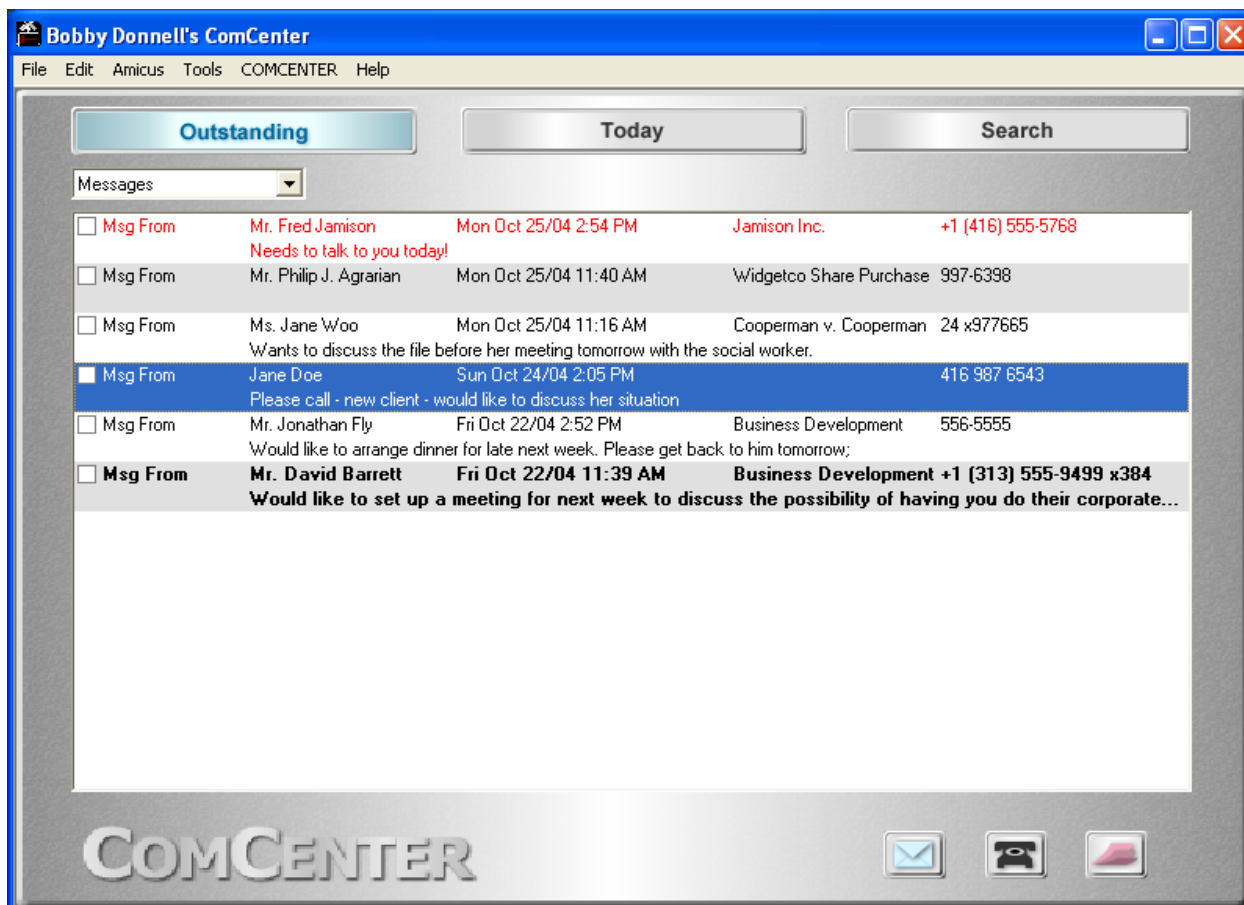
Notice the row of buttons on the top right of the screen – this is your Office Toolbar. The toolbar provides you with a quick way to access the different modules in AA. If you look closely, you should see:





Each of these icons or 'buttons' opens a different module of AA. For the moment in this task we are going to concentrate on the ComCenter button – which opens the Communication module in AA.

Now let's return to our task. Let us assume that someone in your office took a phone call message for you from Jane Doe. They would have used AA's phone message slip within the ComCenter module. The phone message then shows up on your desktop within your ComCenter module. To check for your new or unreturned phone messages, the first thing you would do in AA is to click on the COMCENTER button on the toolbar to open up the ComCenter module. You should see:



This is your Communications center within AA – allowing you to track all incoming and outgoing telephone calls and messages, emails, faxes and letters. For the moment we will concentrate on phone calls and messages only.

Since this is a telephone call you wish to return, you would want to first look at the phone message. Double-clicking your mouse while pointing anywhere

within the phone call note will open the phone call message. You should see:

**Phone Message**

To: Bobby Donnell Today 02:05 PM

From: Jane Doe 416 987 6543

File:

☐ Call was Returned ☐ Do not Purge ☐ Dealt with

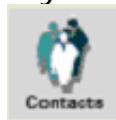
M  
E  
S  
S  
A  
G  
E  
Please call - new client - would like to discuss her situation

URGENT ☒ Please Call ☐ Returned Your Call ☐ Will Call Again ☐

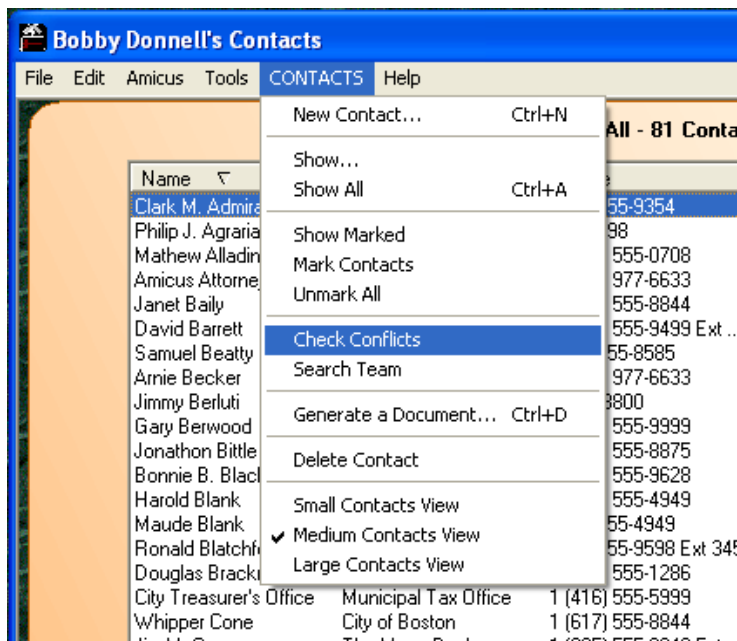
Delete Forward Make This a To Do OK Cancel

Taken by: Bobby Donnell

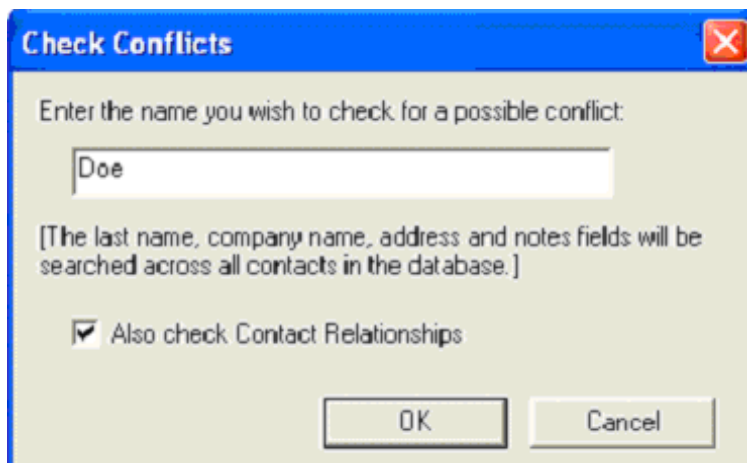
The first thing a prudent solicitor would do is check to ensure that they would not be in a conflict by talking to Jane Doe about her case. So what do you do? Check to ensure that no one in your firm has acted for Jane Doe!



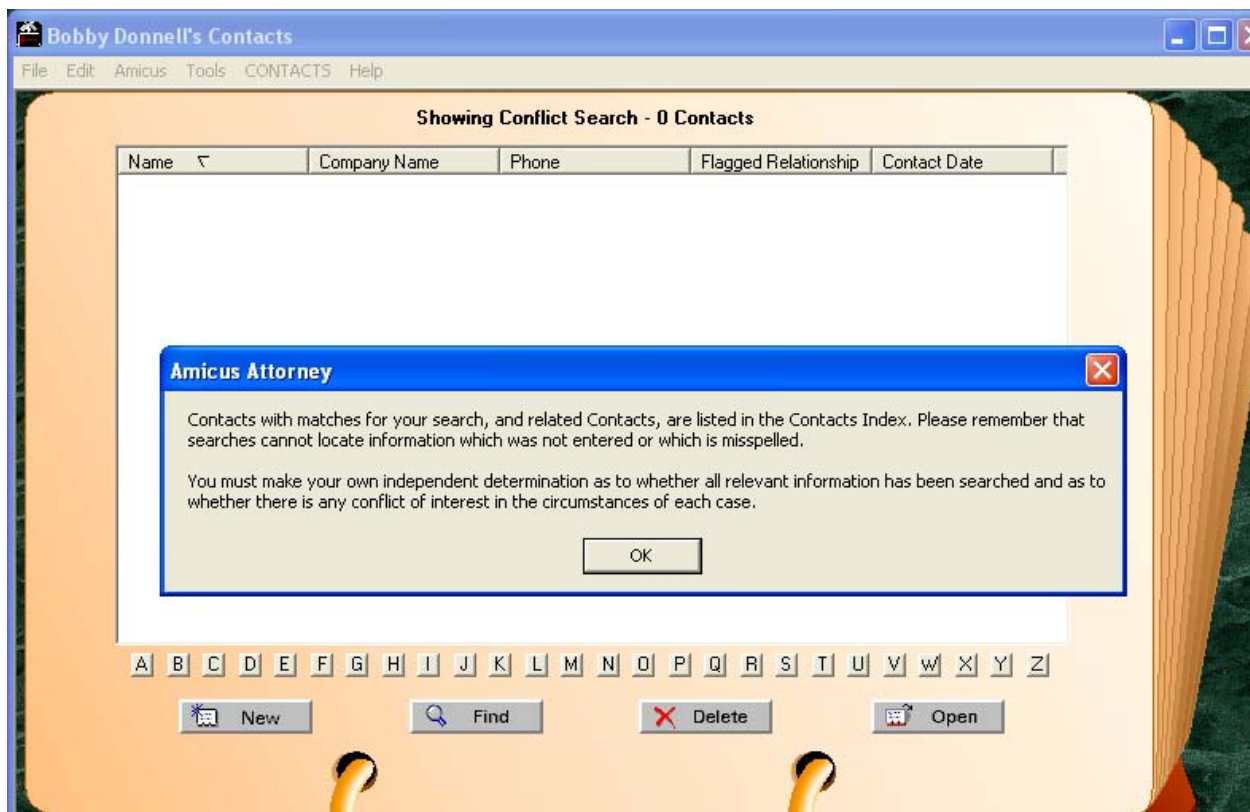
So how can you do this? Click on the icon – this will bring up the Contacts Module. Now click on Contacts and then Check Conflicts from the menu as follows:



You will notice the following dialogue box opens:



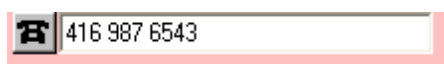
When you click on the OK button, you should see the following:



You can see that the conflict check came up negative.

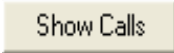
If you had located a match, you could then open Jane Doe's entry in AA to see if she is an existing client (which is just fine) or a party adverse in interest or simply someone in the firm's database that happens to have the same name. If you don't find Jane Doe, then you know that no one in your firm has dealt with anyone of that name.

Having determined that Jane Doe is someone to whom you can speak, you click on the telephone icon next to Jane Doe's telephone number.

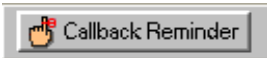


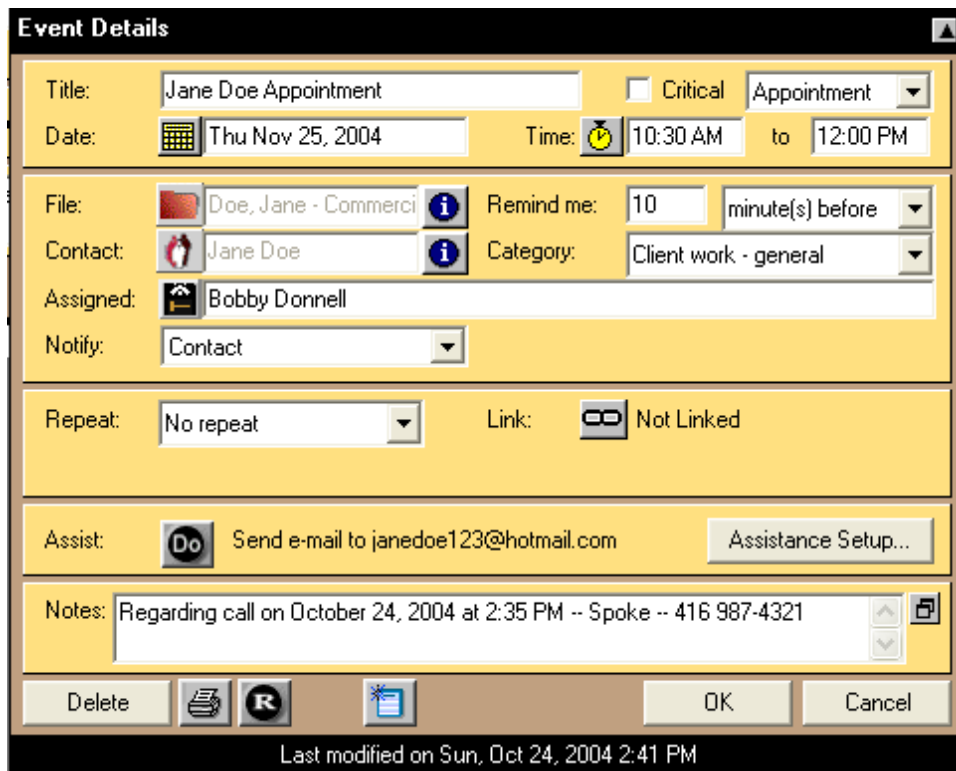
This opens the telephone message dialogue box (and if you have Amicus' Telephone Pro installed, it will dial the number for you as well). You should see:

In this box you can see the Call Summary area where you can record the notes of your telephone conversation. There are several reasons for doing this. The first and foremost is to have a permanent record of this call within

AA. This allows you to click on  to bring up the notes of all past telephone calls with Jane Doe while you are still making small talk with her on the line. This is a very useful way to quickly 'come up to speed' without having to go on a hunt for Jane's file. This allows you to always appear to be 'on top of things' whenever a client or another lawyer calls. The second reason would be that AA is most useful when as much information is stored within it as possible – such as the record of all past conversations and communications. This allows you to use the search features of AA to find all past communications (and attempts to communicate such as notes of leaving messages) with any person without having to find the paper file. I use this feature constantly in my practice at the Law Society where I must constantly give advice to lawyers (ie our clients). My AA contact database contains 6900+ people; and I NEVER have to go in search of a paper file to determine what advice I gave to any of them at any time over the last 5.5 years.

Having determined that you do not have a conflict, the next thing is to make an appointment with Jane Doe to discuss her new file.

Notice the  button and click it. This opens up an Event Details dialogue box. In the example below, I have entered the purpose of the meeting in the Title area, used the drop down menu to select "Appointment", scheduled the time for the meeting to be from 10:30 to 12:00 PM for Nov. 25, 2004 and created an email reminder for Jane Doe located the meeting at my office.

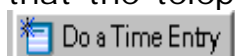


The "Event Details" dialog box contains the following fields and controls:

- Title:** Jane Doe Appointment
- Critical:** ☐
- Appointment Type:** Appointment (dropdown menu)
- Date:** Thu Nov 25, 2004
- Time:** 10:30 AM to 12:00 PM
- File:** Doe, Jane - Commerci (with info icon)
- Remind me:** 10 minute(s) before (dropdown menu)
- Contact:** Jane Doe (with info icon)
- Category:** Client work - general (dropdown menu)
- Assigned:** Bobby Donnell
- Notify:** Contact (dropdown menu)
- Repeat:** No repeat (dropdown menu)
- Link:** Not Linked (with link icon)
- Assist:** Do Send e-mail to janedoe123@hotmail.com (with Assistance Setup... button)
- Notes:** Regarding call on October 24, 2004 at 2:35 PM -- Spoke -- 416 987-4321
- Buttons:** Delete, Print, Repeat (R icon), New (plus icon), OK, Cancel
- Status:** Last modified on Sun, Oct 24, 2004 2:41 PM




On clicking "OK" this event will be scheduled in my calendar and the Event Dialogue box will disappear. A couple of things – one, we have indicated that a reminder is to be sent to the Contact (ie Jane Doe) to automatically send an email to Jane Doe the day before the appointment to remind her of the appointment with you. You could also have clicked on the "Assigned:" button to schedule this appointment with your associate to attend the meeting, if you wished.

One matter remains: making a time and billing entry for all of this. Notice that the telephone call dialogue box is still open and contains the button:






Click on this button. You will see a time entry dialogue box open as follows:




**Time Entry Details**

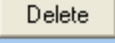


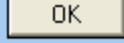
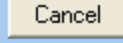
File:  Doe, Jane - Commercial lease matte   Today

Client:  
Matter:  
Client ID: Matter ID:

Category:  Billable Billing Rate:  Normal (Default Rate)

Activity code:  None

Activity Description:  
Telephone call to Jane Doe   

   0.20  

Entered at 14:56PM Oct 24

In this case I have created a new file for Jane Doe and entered this info into the Matter field. The billable time entry will be complete when you click on "OK".



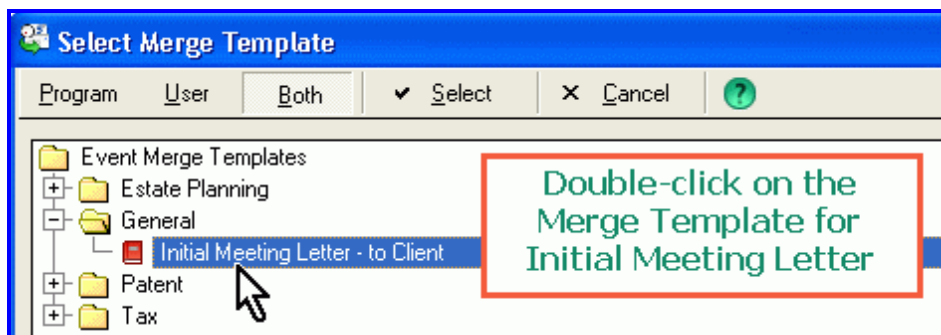
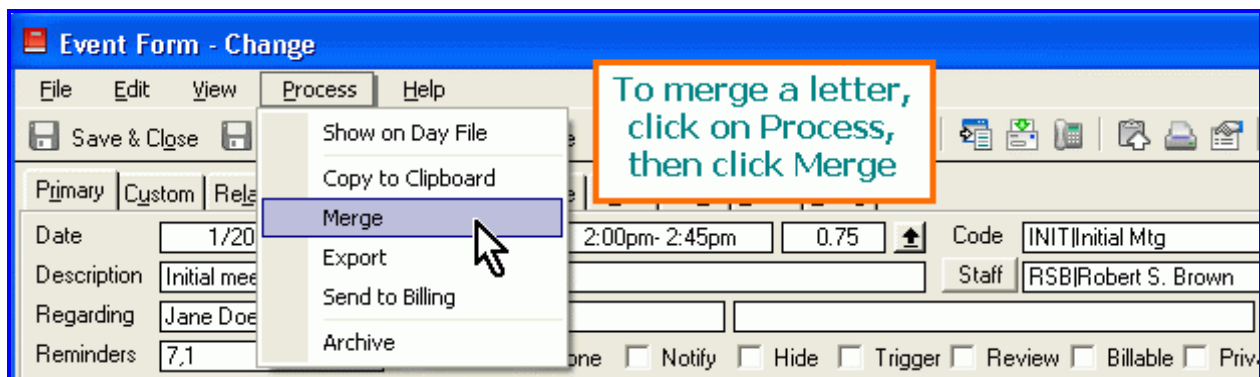
## Task 2 – Send a Letter

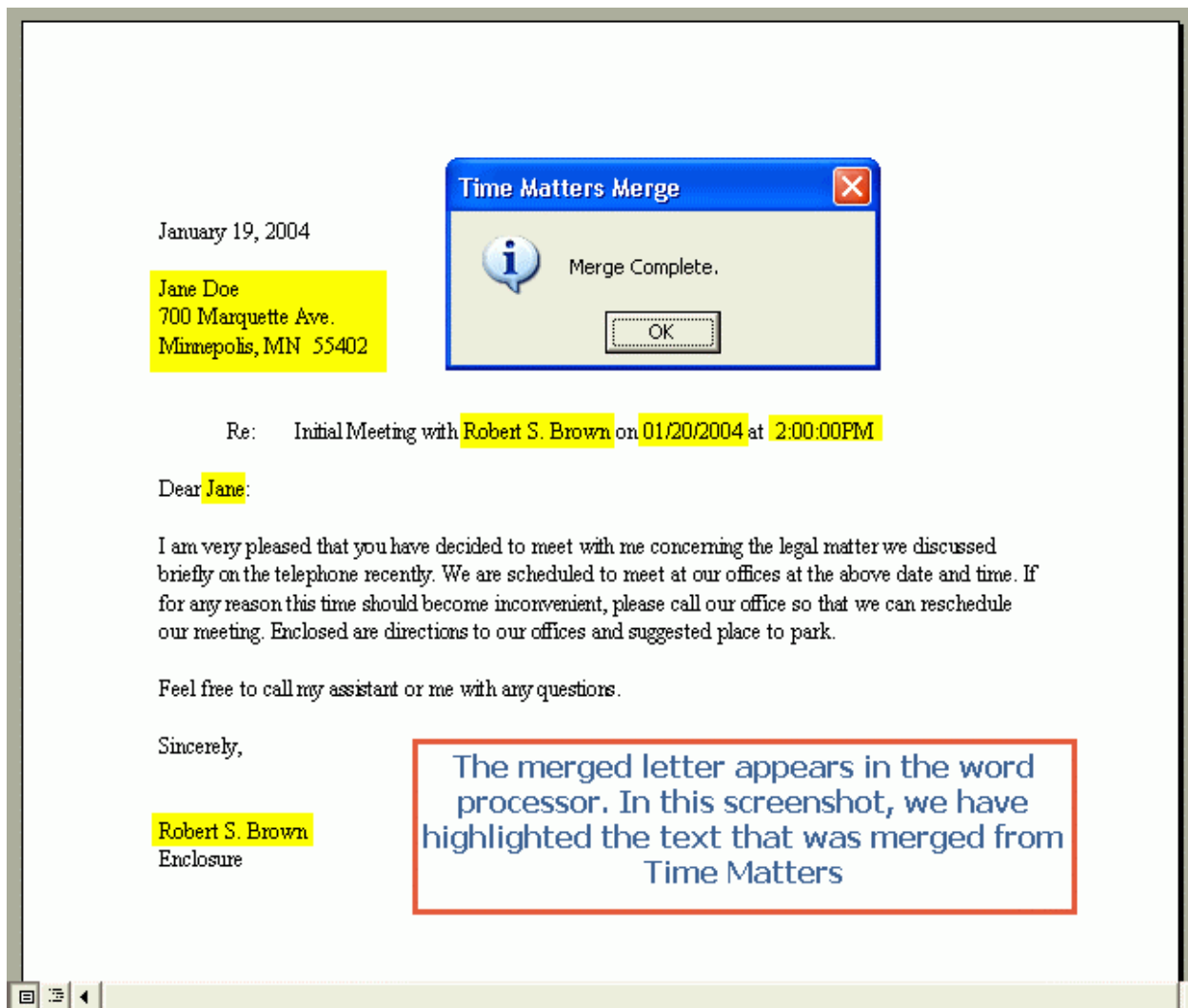
**Use document assembly to generate an initial client meeting confirmation letter to the new client and docket the time**

This is another basic function that is performed in law offices hundreds of times everyday. Lawyers and law office staff spend much of their time generating documents. Anything that will allow them to do this more efficiently should be welcomed with open arms. Most practice management software now includes advanced document assembly and automation functionality. This allows you to easily and almost instantly create generate documents from precedents that include client specific information. Don't forget to docket your time. Here is how both Amicus Attorney and Time Matters would handle this task.

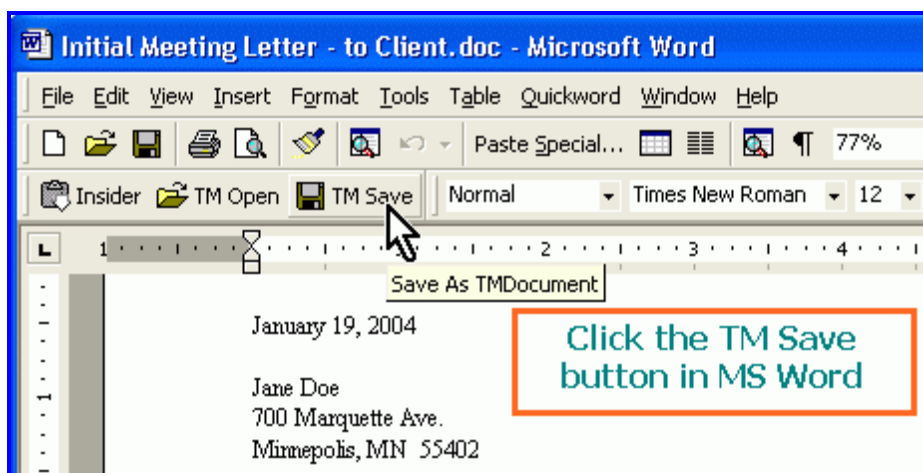
### Task 2 – Time Matters

After entering the Initial Meeting with Client in Robert Brown's calendar (described in Task 1, above), assistant Allison merges a confirmation letter. She still has the Event Form up on her screen.





In MS Word, Allison clicks the special Time Matters button, "TM Save," to save document and link it to Jane Doe in Time Matters.



In the Document Form, Allison chooses a **Code** that best describes the type of document, CORR for Correspondence. She enters the amount of time to be billed to the client for the document then types a descriptive file name that Time Matters will use when it saves the document to disk.

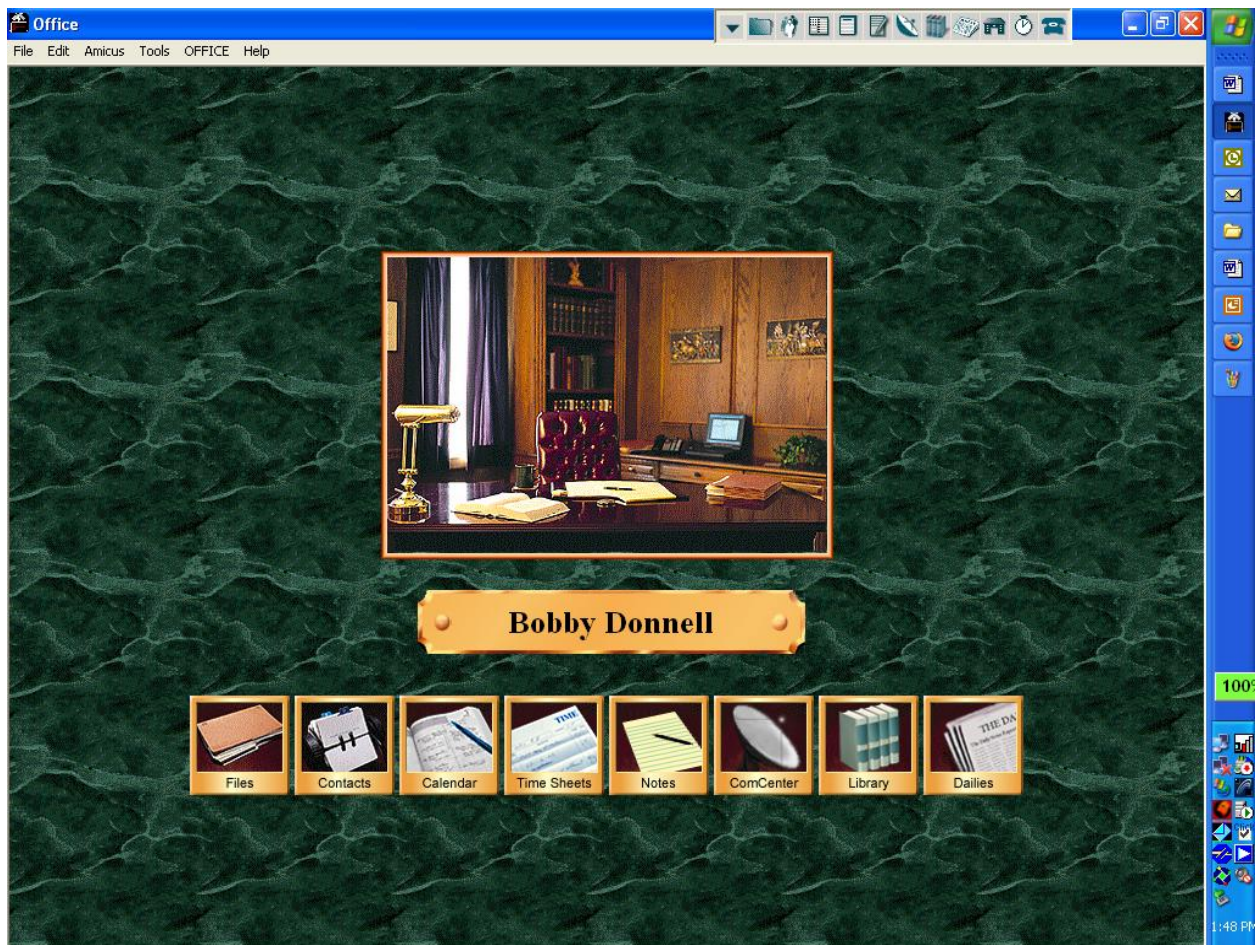
Allison records a time record for preparation of the letter to the client.

## Task 2 – Amicus Attorney

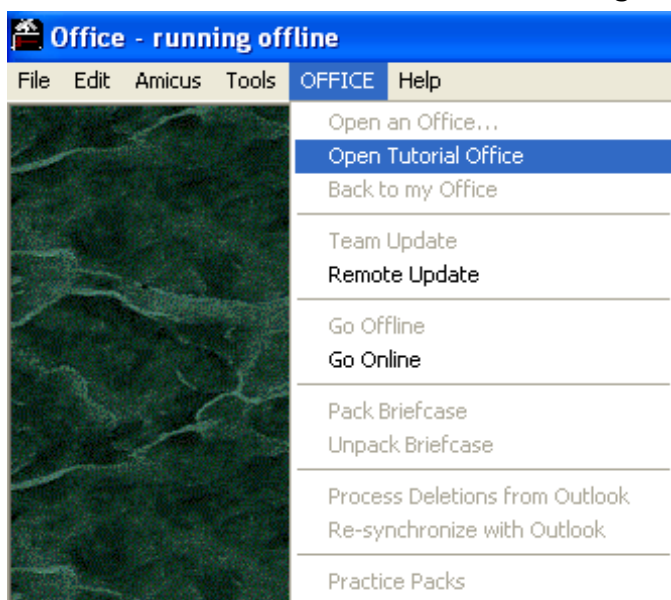
So you have had your first meeting with the new client. You need to send a confirmation letter to the client – confirming as Abe Lincoln said, that they have a lawyer and you have a client. For the rest of this paper, you can follow along on your computer in Amicus Attorney version V+ by launching



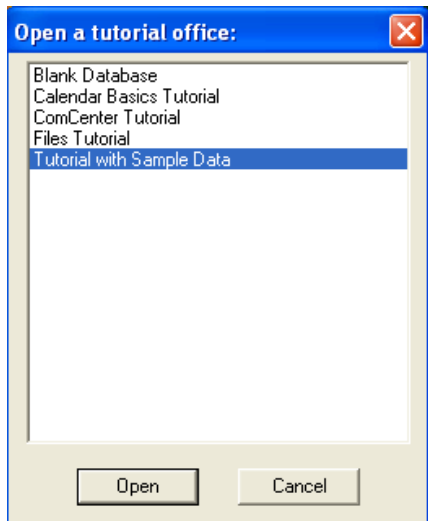
Amicus Attorney and clicking on the Office button on the toolbar. This launches the office module – you should see:



Now click on the word OFFICE in: File Edit Amicus Tools OFFICE Help at the upper left of the Office module. This will bring down a menu as follows:

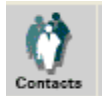


Now click on Open Tutorial Office. You will see a further pull-down menu as follows:

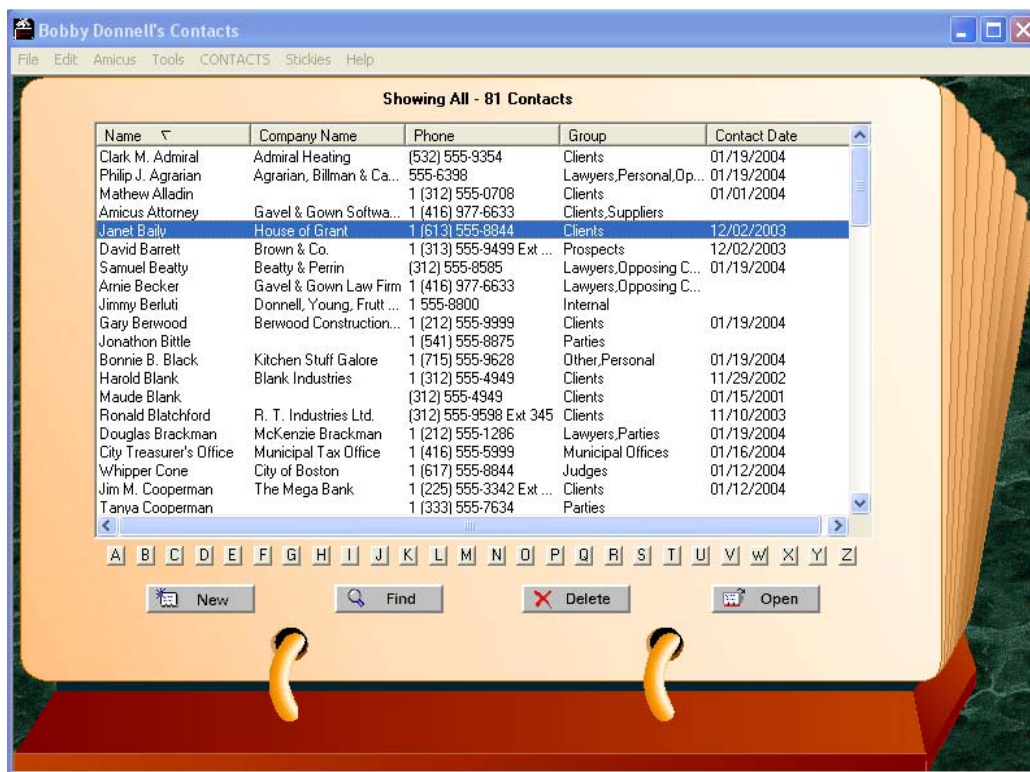


Click on "Tutorial with Sample Data" and click "Open". Now your office on the screen will match the rest of this paper and you will be able to follow this demonstration exactly on your computer.

Let's go back to our task at hand. We need to send a confirmation letter to our new client. How can you do this quickly and efficiently? First, click on the

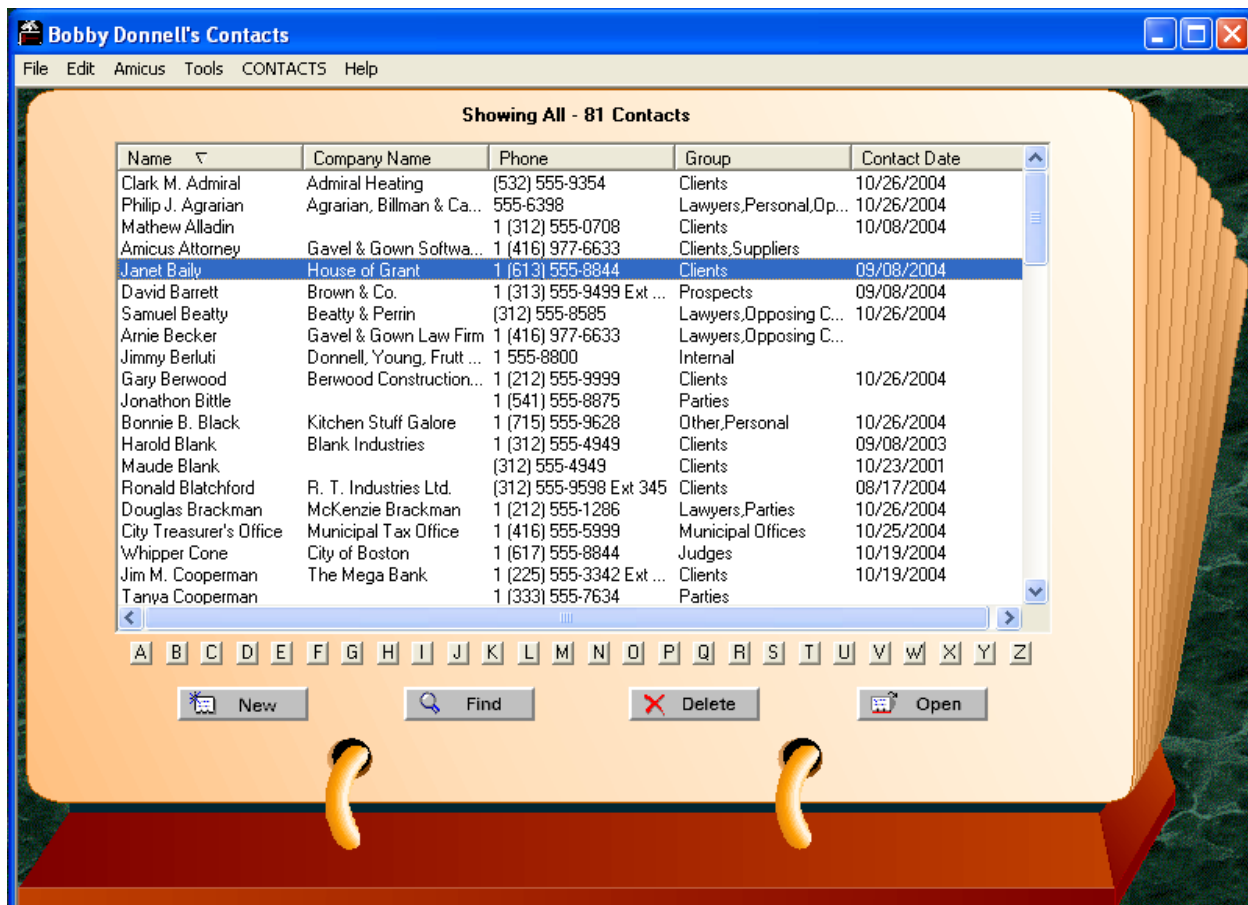


button on the toolbar. This opens your list of contacts:



For this example, double-Click on Janet Baily or highlight her and click "Open". You should see:



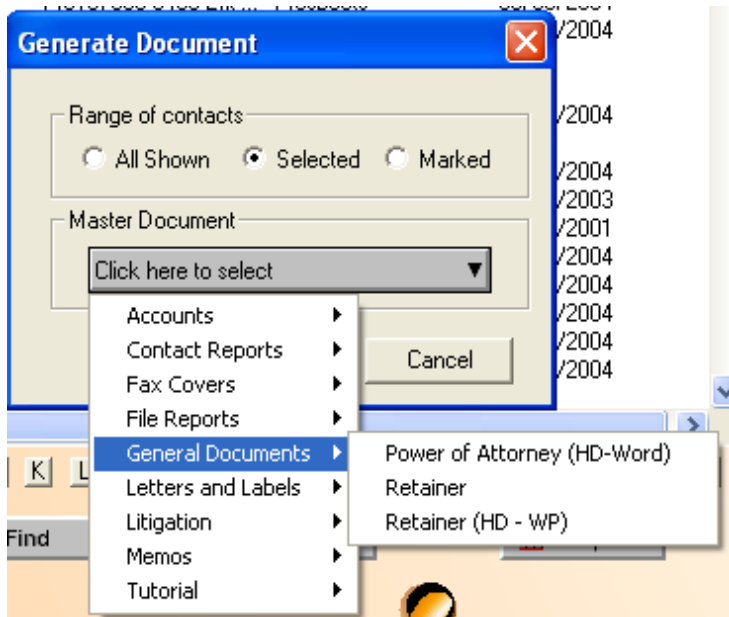


Now, click on Contacts – you should see a pull-down menu. Click on Generate a Document within that menu:

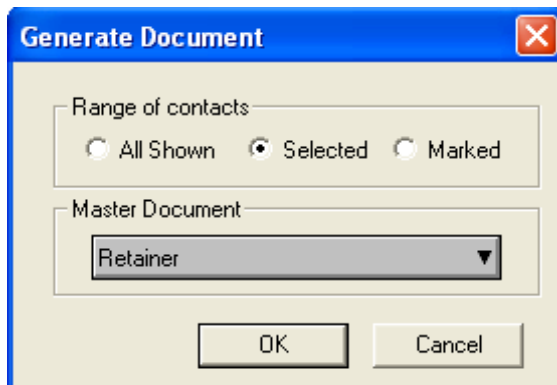




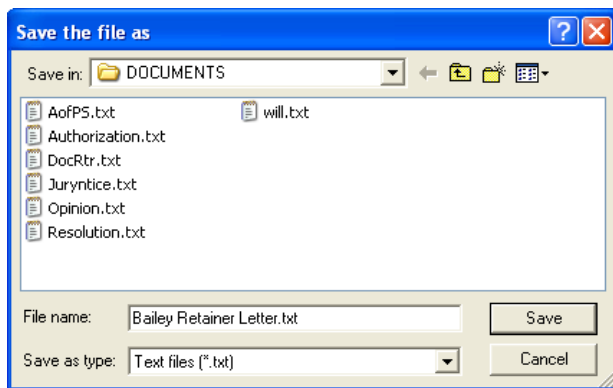
You should see a dialogue box open, asking you to select a Master Document:



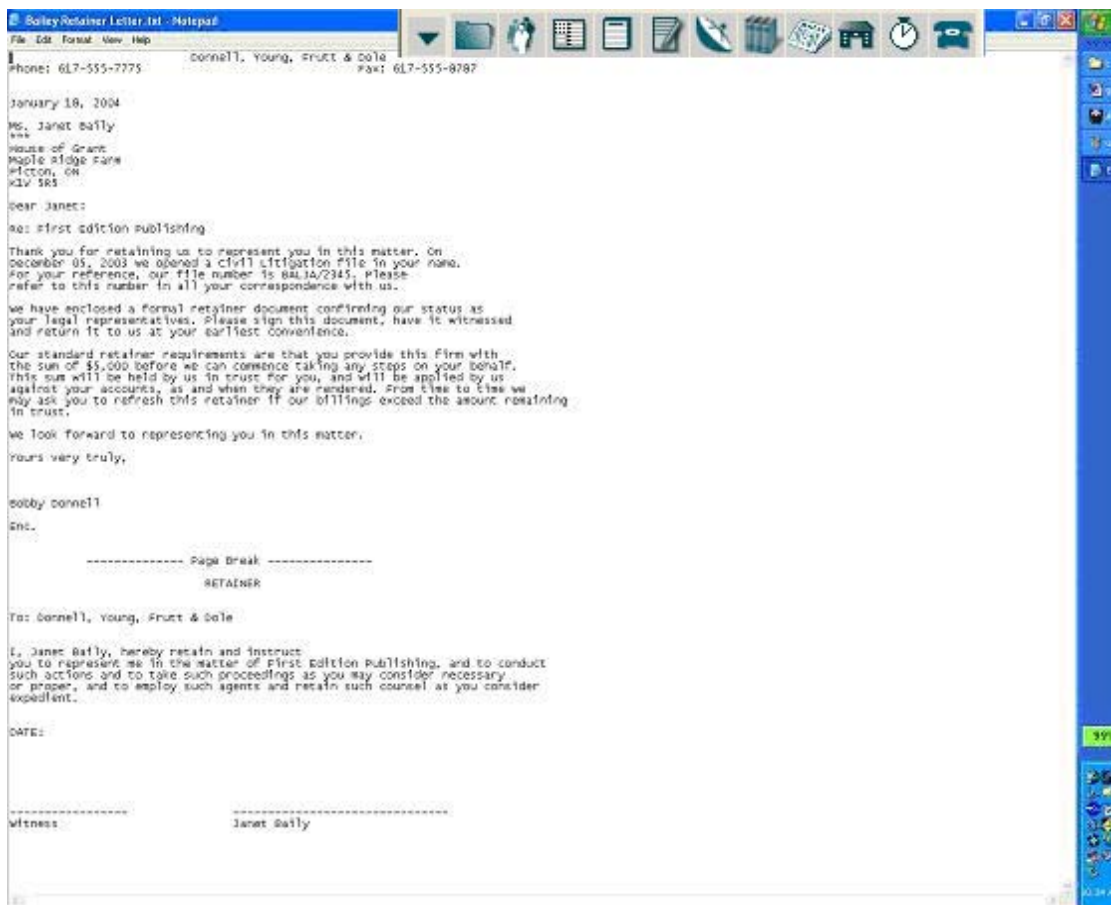
Click on the down arrow and the pull-down menu appears. Click on General Documents which produces the sub-menu. Click on Retainer, and you will see that "Retainer" is now shown as the Master Document [Retainer (HD-WP) is a retainer agreement precedent for use with Hot Docs and WordPerfect].



Click on the OK button. Now you have to tell Amicus the name under which you wish to save the retainer letter.



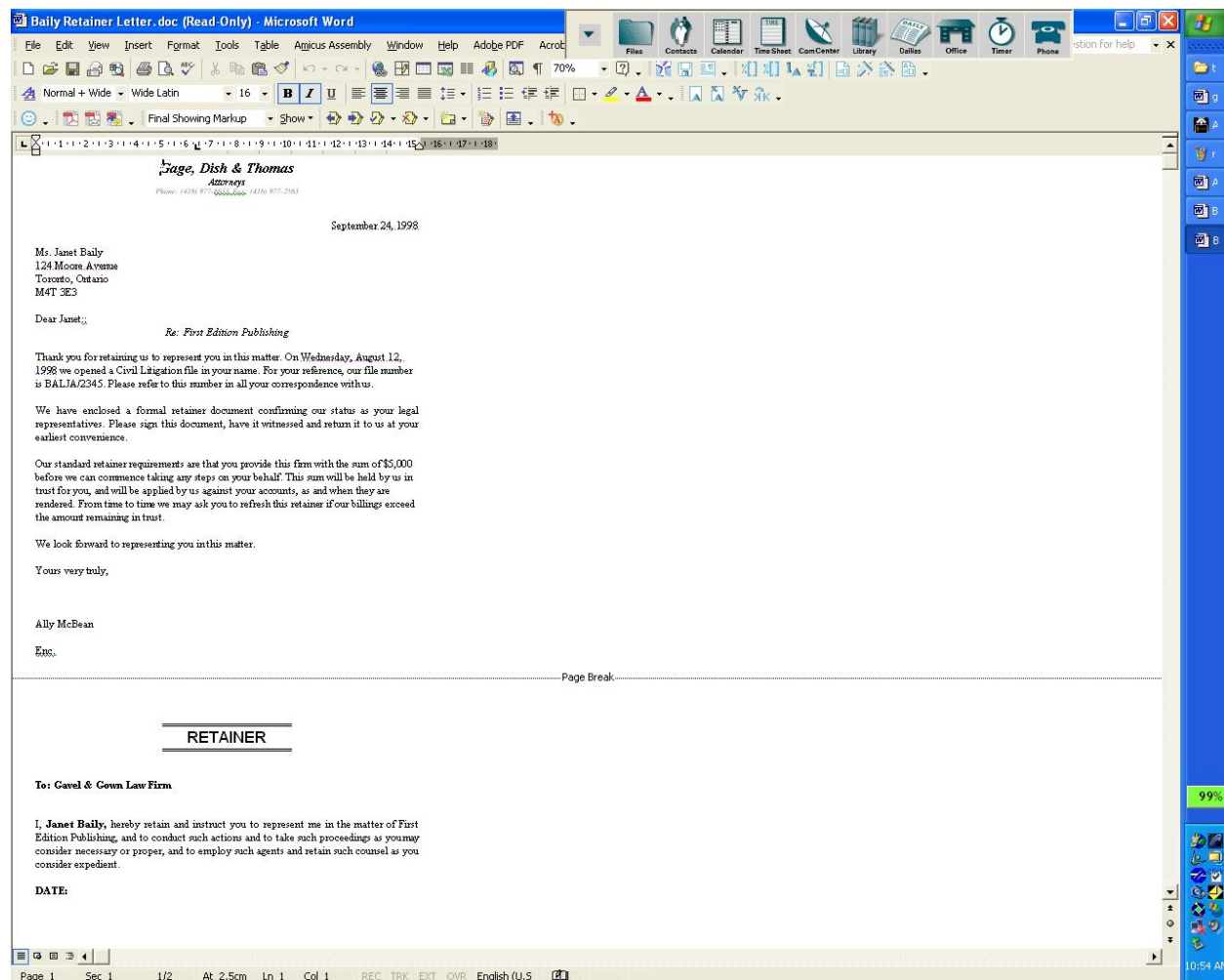
Click "Save" and the retainer letter and agreement are created (in this case in Notepad):



You can create an unlimited set of precedents that can be merged from within Amicus Attorney: using Notepad if you wish, or Word or WordPerfect merge; or Hot Docs with either Word or WordPerfect; or by using Amicus Assembly – an add-on product that is a full featured document assembly

application (Ghostfill is the document generation engine, adapted to work with Amicus Attorney).

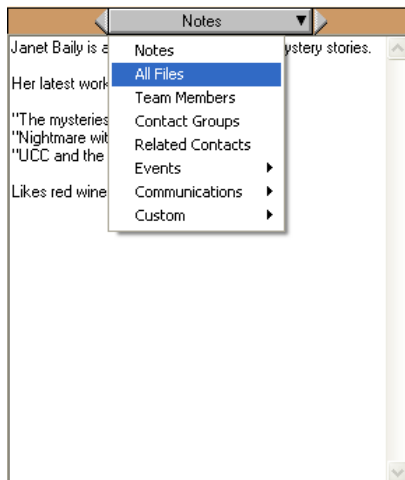
Here is the same letter and agreement if you had generated it in Word merge format:



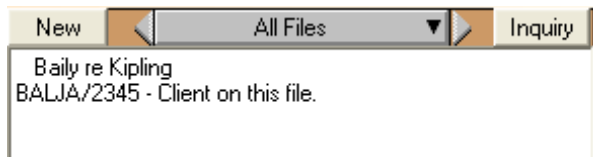
Now that we have the letter and retainer agreement, we need to docket our billable time. Go back to Janet Baily's contact listing by clicking on the



Contacts button on the toolbar. You should see her 'rolodex'-like listing – notice the grey area on the right hand side of her listing – this is the 'brad' and clicking on it brings up different sub-pages of info relevant to Janet and her files as follows:

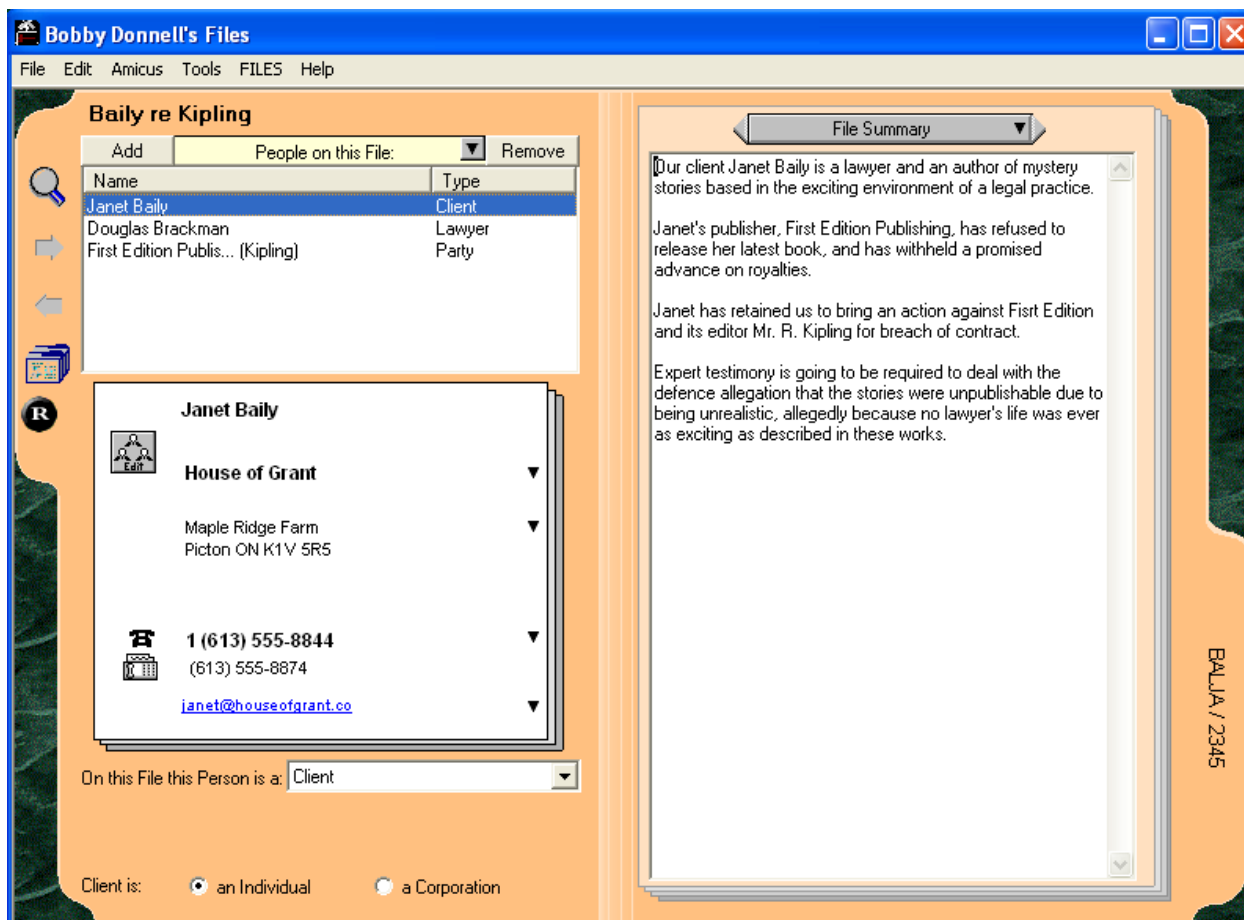


Click on “All Files” – this brings up the brad of all the files for Janet Baily:

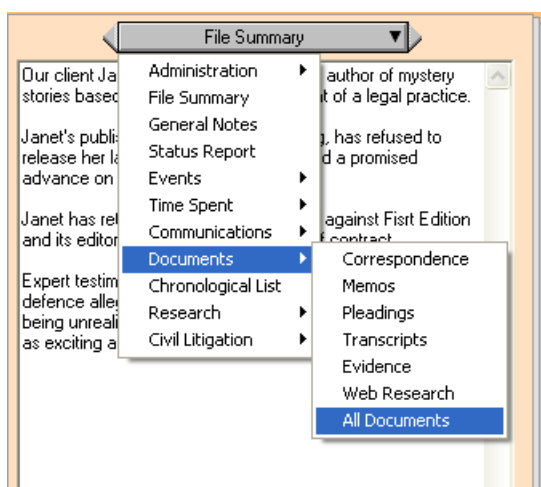


Double-click on the Baily re Kipling file – this is the file on which we have been working – this highlights how in Amicus you can start with a contact and go to any file relevant to that contact. If you wish, you could have started from the “Files” button on the toolbar and looked for the “Baily re Kipling file” – but in our case starting from the contact listing for Janet is faster since we are already working from here.

Double-clicking on the “Baily re Kipling” entry on Janet Baily’s contact brad opens this file as follows:

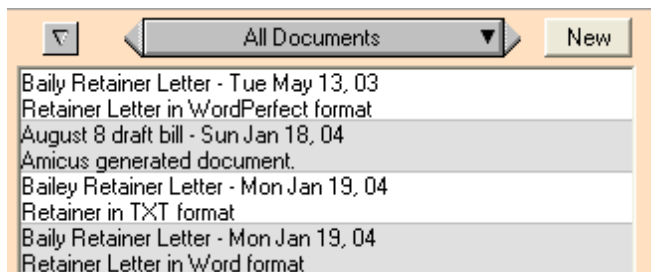


Now, click on the 'brad' for this file and you will see a drop-down menu – click on "Documents" in this menu and you will see a sub-menu appear – click on "All Documents" in the sub-menu:



This will open up the brad containing all documents associated with this file as follows:

What you should see is a listing of the document that you have just created on the file – in my case (below) you will see multiple documents since I have created the Retainer letter in Word, WordPerfect and Text-only formats:



Click on any of the entries – you will see a document profile dialogue box open as follows:



Notice the “Do a Time Entry” button on the lower right side of the dialogue box – click on it. This brings up a time-entry dialogue box as follows:

**Time Entry Details**

File: Baily re Kipling Today

Client: Janet Baily  
Matter: First Edition Publishing  
Client ID: BALJA Matter ID: 2345

Category: Billable Billing Rate: Normal (Default Rate)

Activity code: None

Activity Description:  
Met with client; discussed new claim, discussed legal basis for claim, timing of litigation and possibilities of settlement prior to trial; discussed need for retainer and amount and need to refresh from time to time as accounts are rendered; generated retainer letter and agreement; review and signature and forwarding same to client

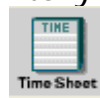
1.50

Entered at 11:19AM Jan 18

In this case I have filled in the details of the meeting and what was discussed as well as the details of the retainer and refreshment of same. I also entered the time that this took – 1.5 hours (another method to do this



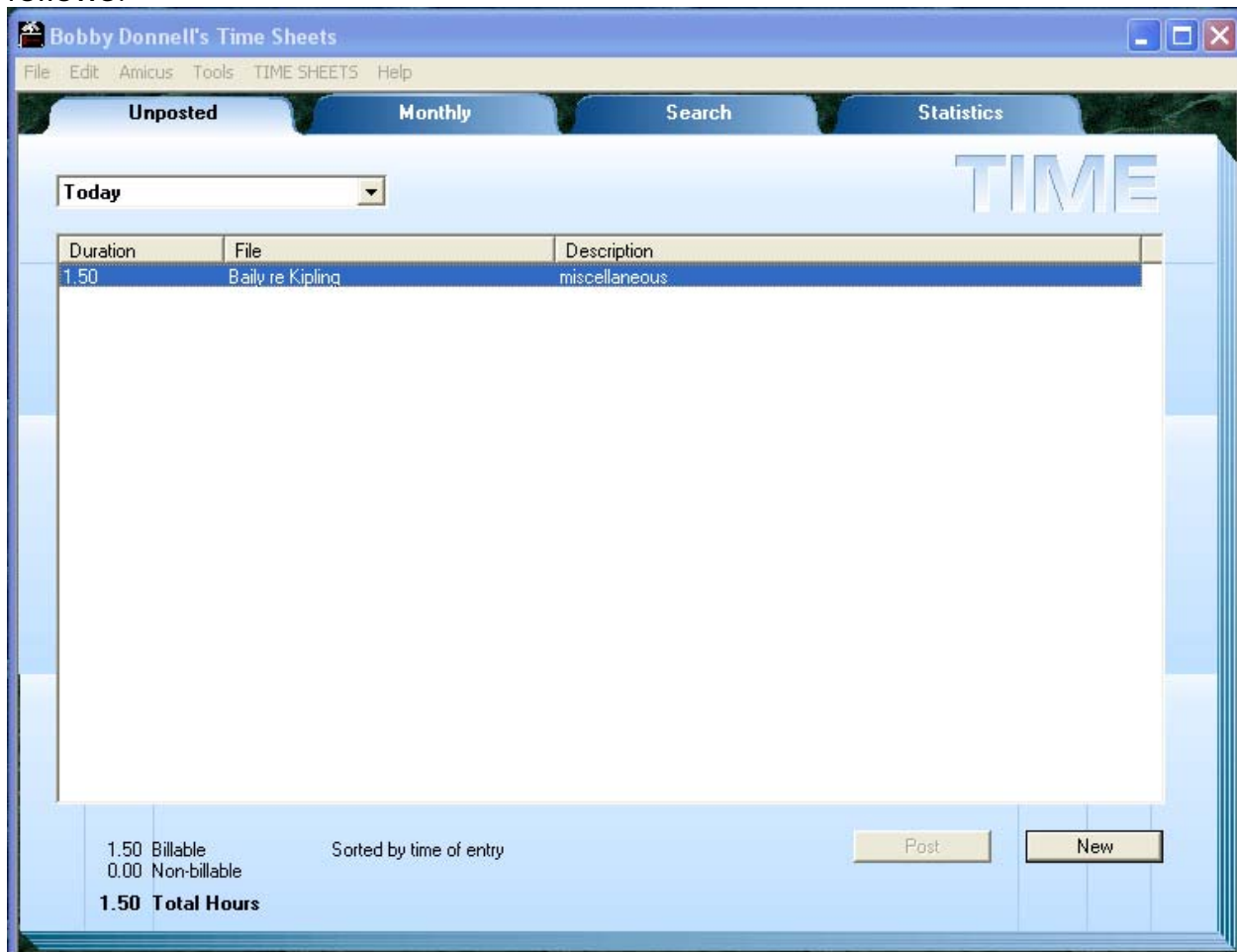
would be to start a “timer” within Amicus at the start of the meeting – and use the timer to generate a Time Entry..). Once you click “OK” the time entry is entered into your time sheet in Amicus. To confirm that this has



occurred, click on the Bailey time entry as



follows:



Notice a few things while we are here. First, your time is accumulated and tabulated as you make time entries during the day. Secondly, the time sheet keeps tab on your billable and non-billable time during the day – allowing you to have 'real time' feedback on how you are doing in terms of meeting your minimum billable time entry requirements. Bu there is more – click on the Statistics tab **Statistics** in the timesheet at the upper right-hand side. You will see a summary of how you are doing from a time-billing standpoint, that is kept up to the minute:

**Bobby Donnell's Time Sheets**

File Edit Amicus Tools TIME SHEETS Help

Unposted Monthly Search Statistics

Recalculate

☒ Include Unposted Time

**TIME**

	This Week	This Month	This Year	Last Year This Date
Actual Billable:	38.90	104.00	1547.00	0.00
Actual Non-billable:	1.90	13.60	127.60	0.00
Actual Total:	40.80	117.60	1674.60	0.00
Billable Hours Goal:	37.00	151.08	1813.00	1712.00
Hours Remaining to Reach Goal:	1.90	47.08	266.00	1712.00
Percentage Achieved To-date:	105.14%	68.84%	85.33%	0.00%
Projected Hours at Current Pace:	38.90	144.00	1850.33	1712.00
Percentage that would be of Goal:	105.14%	95.31%	102.06%	100.00%

	This Year Goals	Last Year Actuals
Billable Hours Total:	1813	1712
Non-billable Hours Total:	147	164
Average Billable Hours per Month:	151.08	142.67
Average Billable Hours per Week:	37.00	35.67
Avg Billable Hrs per Business Day:	7.40	7.13
Vacation Days:	10	12

Current average billable hours per business day:

**7.58**

Average required to achieve goal for the 40 working days remaining to you this year:

**6.65**

This sheet assists in goal-attainment and income-fulfillment! You can see that Amicus keeps tab not only on your billable time for the day, but also for this Week, this Month, This Year and compares this with last-year's data (for comparison's sake). Amicus also provides you with forward-looking data: the box in the lower-right tells you what you have to do to keep on track from a billable-time standpoint:

Current average billable hours per business day:

**7.58**

Average required to achieve goal for the 40 working days remaining to you this year:

**6.65**

In this case, Bobby Donnell is ahead of his billable hours target of 7.4 hours/day.

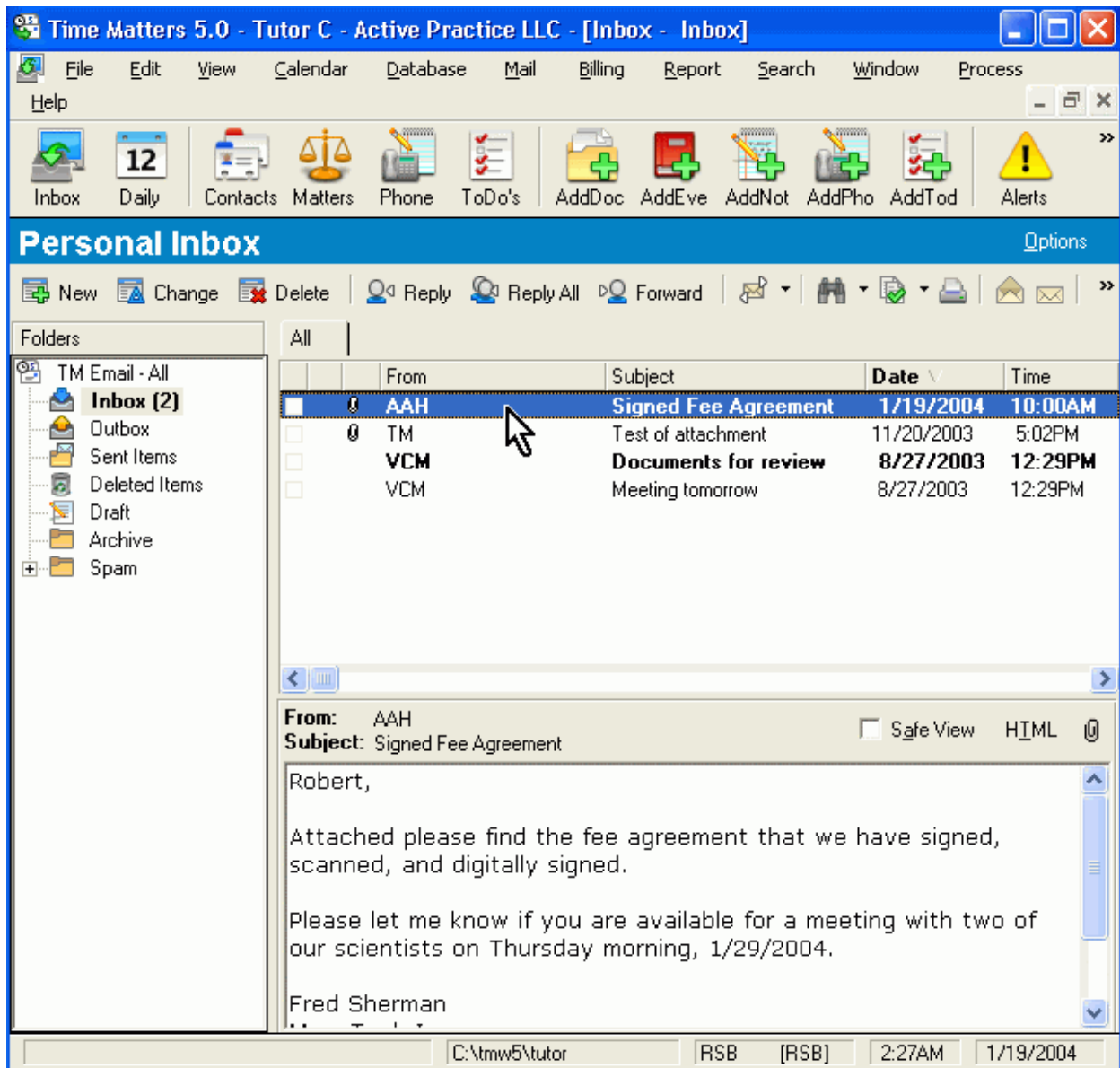
## **Task 3 – Respond to a Client Email**

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**Receive a client document via Email, file the document in the matter, check the matter status, respond to Email, and docket time**

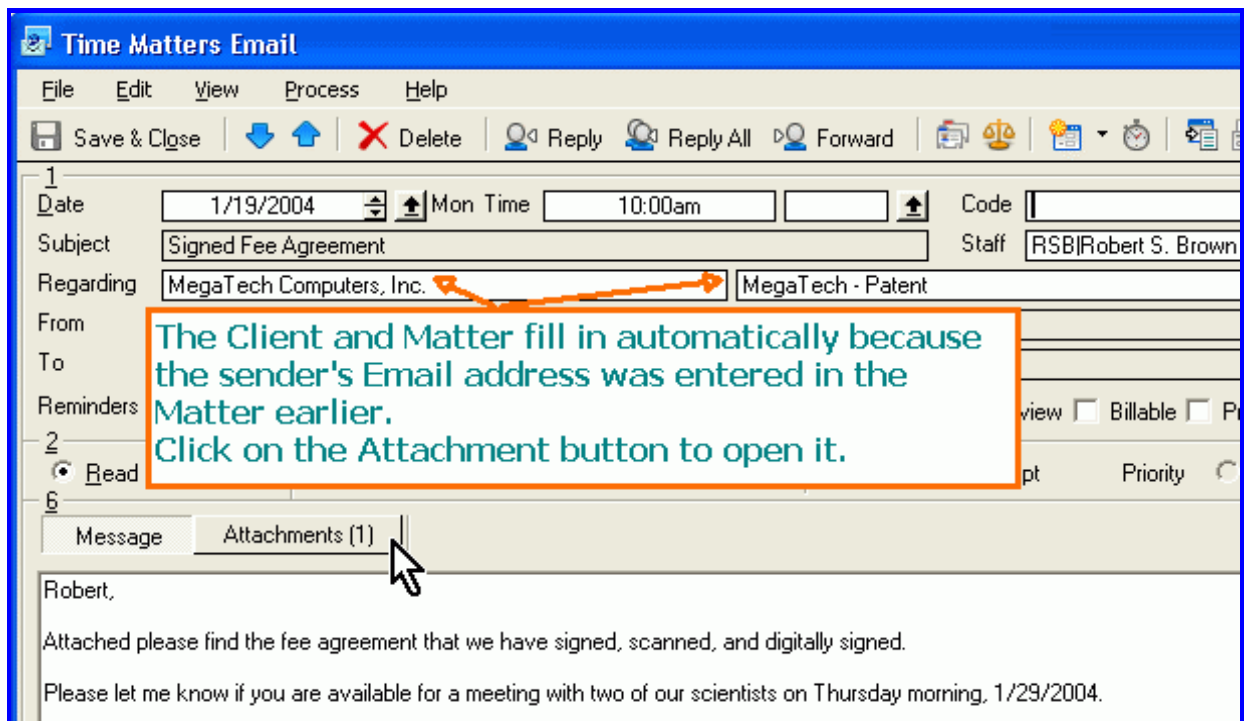
Undoubtedly lawyers and law office staff will tell you they are overwhelmed with trying to keep up with e-mail messages. Practice management software is updated immediately as it is used by everyone in the office. Armed with the current status of a matter, a task such as promptly responding to a client Email may be performed without ever looking at the paper file. Here is how both Amicus Attorney and Time Matters would handle this task.

## Task 3 – Time Matters



Alerted by an optional sound or flashing icon that he has new Email, Robert Brown opens his Personal Inbox by clicking the Inbox icon on the toolbar.

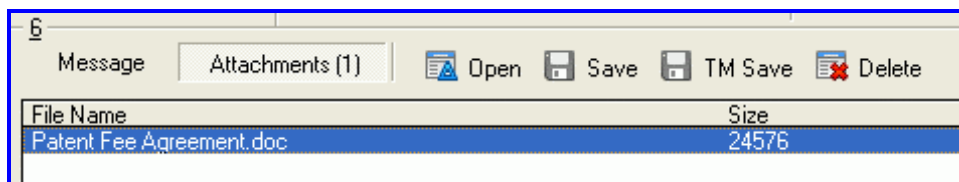
An Email has arrived with an attachment regarding a Signed Fee Agreement. Robert can scan the contents of the Email message in the Preview Pane below the list of Emails. It is important, so he double-clicks on the Email to open it.



#### Time Matters Email message

Because the sender's Email address matches the Email address entered in the MegaTech - Patent matter, the client name and matter name are filled in automatically by Time Meters.

Robert clicks on the Attachments button to bring up a list of attachments.



#### Attachment List

The Attachment list appears with options to Open, Save, TM Save or Delete. Robert clicks the TM Save button to bring up a Document Form used to link the document to a matter and to save it.

**Document Form - Add**

File Edit View Process Help

Save & Close Save [Up Arrow] [Down Arrow] [X]

1

Date 1/19/2004 Mon Time 11:00am 0.00 Code Staff

Description

Regarding MegaTech Computers, Inc. MegaTech - Patent

File Name &MegaTech Computers, Inc.\MegaTech - Patent\DOC

Document Form automatically fills in the Date, Time, Client and Matter. Document is auto-assigned to a Matter folder within a Client folder.

## Document Form

The Document Form has already filled in the Date, Time, Client and Matter Name and a filepath (the folder and subfolder where the document will be stored). When Robert fills in a descriptive name in the Description field, Time Matters will complete the File Name. Robert clicks Save & Close to save the Document Form and the document file to disk.

Returning to the client's Email message, Robert now opens the attachment and reviews it. No action is required on the agreement, so Robert deletes the attachment, knowing he already linked it to the matter and saved it.

Before replying to the request for a meeting contained in the Email, Robert opens up the MegaTech Patent matter to check its status.

**Matter Form - Change**

File Edit View Process Help

Save & Close Save [Down Arrow] [Up Arrow] Delete [Add] [Calendar] [Print] [Fax] [Cancel]

Primary Secondary Additional Custom Related Notes Documents Phone Email Mail Web Billing Timeline A/R

MatterRef MegaTech - Patent Code PATIPatent

MatterNo 02-1435.6 Court

Plaintiff MegaTech Computers, Inc.

Client MegaTech Computers, Inc.

Timeline

Clicking on the Timeline tab of a Matter shows all the dated information in the system regarding a Matter listed from oldest to newest.

Type	Date	Time	Desc	Code	Status
Custom	6/02/2003	6:36p	Corporate checklist	INCD	A
Billing	6/04/2003	12:00a	Charge for Expenses		
Phone	11/07/2003	8:02a	Need to reschedule Wed meeting	FCLI	
Note	1/12/2004	2:55p	Scientific expert opinion received from F	CMNT	
Email	1/19/2004	10:00a	Signed Fee Agreement		
Document	1/19/2004	11:00a	Fee Agreement - signed		
Note	12/20/2004	3:07p	Discussion re: prior art	CMNT	

## Timeline Tab on Matter Form

The screenshot shows the 'Time Matters Email' application window. The menu bar includes 'File', 'Edit', 'View', 'Process', and 'Help'. The toolbar contains buttons for 'Save & Close', navigation arrows, 'Delete', 'Reply', 'Reply All', and 'Forward'. The email list shows one email with the subject 'Signed Fee Agreement' and the sender 'MegaTech Computers, Inc.'. The 'Reply to Sender' button is highlighted with a red box and a mouse cursor.

Before sending the Email, Robert clicks the Send to Billing button. When Billing Matters is activated with Time Matters, a complete timekeeping and billing systems is available with the Time Matters program. The Billing Item form appears.

**Billing Item Form - Add**

File Edit View Process Help

Save & Close Save Undo Redo Delete Copy Paste Send Bill Cancel

**Billing Details**

Regarding MegaTech Computers, Inc. MegaTech - Patent 02-1435.6

Time Code CORR-CLI Correspondence to client Phase Staff RSBI/Robert S. Brown

Description Correspondence to client

Total Dur 0.30 Hours Start Time Charge Status Billable Hold Record

Bill Date 1/19/2004 Mon

Billing Item List

On Billing Item Form all the information is inherited from the record Robert was working on. All he has to complete is complete the details of the Description that will appear in the invoice.

Practice Management Software Face-Off 2005



Time Matters 5.0 - Tutor C - Active Practice LLC - [Quick Item Entry]

File View Calendar Database Mail Billing Report Search Window Help

Inbox Daily Contacts Matters Phone ToDo's AddDoc AddEve AddNot AddPho AddTod Alerts Conflict

Time Expenses Close Options

Period: All 1/01/1900 Mon to 12/31/2050 Sat Staff: RSB|Robert S. Brown

Bill Date	Desc	Matter	Billable	NonBill	Total	Status	Dur	Type	Basis
1/19/2004	Phone call with Fred re: scientific studies	MegaTech - Patent	0.20		0.20	Billable	Hours		
1/19/2004	Initial meeting letter - to Client					Billable	Hours	M	
1/15/2004	Teleconference with assistant attorney ge...	Able v. State of Florida	1.25		1.25	Billable	Hours	St	
11/19/2003	Conference with client	Goodrich Estate	0.80		0.80	Billable	Hours	St	
11/19/2003	Preparation of documents	Goodrich Estate	3.00		3.00	Billable	Hours	St	
11/19/2003	Prepare estate planning documents	Goodrich Estate	0.30		0.30	Billable	Hours	St	
11/19/2003	Meet with 3 sons to discuss will	Goodrich Estate	0.80		0.80	Billable	Hours	St	
11/18/2003	Conference regarding estate planning: pre...	Estate Plan	3.00		3.00	Billable	Hours	St	
8/25/2003	Meet with Jeremy Baird - investigator	Able v. State of Florida	1.00		1.00	Billable	Hours	St	

Billable Hours: 126.21 Non Billable Hours: 2.00 No Charge Hours: 1.50 Total Hours: 129.71  
 Billable Expenses: 0.00 Non Billable Expenses: 0.00 No Charge Expenses: 0.00 Total Expenses: 0.00

C:\mwm5\tutor RSB [RSB] 3:26AM 1/19/2004

## Quick Item View – a Spreadsheet for Time and Expense Entry

Quick Item window is available when Billing Matters is activated with Time Matters. It resembles a spreadsheet for entering time and expense records. This window supports the rapid entry of time records. For example, by starting to type the name “MegaTech,” the rest of the first matching name appears highlighted in blue after the cursor. The Quick Item view also shows total hours and expenses for items entered in the list.

Time Matters 5.0 - Tutor C - Active Practice LLC - [Timesheet]

File View Calendar Database Mail Billing Report Search Window Help

Inbox Daily Contacts Matters Phone ToDo's AddDoc AddEve AddNot AddPho AddTod Alerts Conflict Day File

Date: 4/09/2003 Staff: RSB|Robert S. Brown Close Options

Mon, 7		Tue, 8		Wed, APR 9, 2003		Thu, 10		Fri, 11	
Hrs	Desc	Hrs	Desc	Hrs	Desc	Hrs	Desc	Hrs	Desc
1.00	Settlement Conf	10.00	Prepare pleading	0.50	Meet with Staff to prepare for hearing	1.00	Meet with client	0.50	Patent infringement
2.00	Negotiation with	0.20	Begin working o		Brubaker Bankruptcy; 02-1113.1	1.50	Meeting with clie	1.50	Pre-trial Hearing
3.50	File an appeal			2.00	Meet to go over trial strategy	1.00	Staff Meeting	0.10	Call client to req
8.00	Notice of Hearin				Florida v. Sanders; 03-1231.1	1.00	Signing of Irrevoc	0.40	Notice of Hearin
3.10	Draft Notice of H			0.60	Notify all 3 sons of upcoming meeting	0.70	Send Notice of I	2.25	File Schedules a
					Goodrich Estate; 03-1593.1	2.60	Send Interrogato		
17.60		10.20		3.10		7.80		4.75	

C:\mwm5\tutor RSB [RSB] 11:09AM 1/20/2004

## Timesheet

The Timesheet is another option for entering time records using the Time Matters - Billing Matters combination. It shows five days of time records for one timekeeper together with daily totals.

### Task 3 – Amicus Attorney

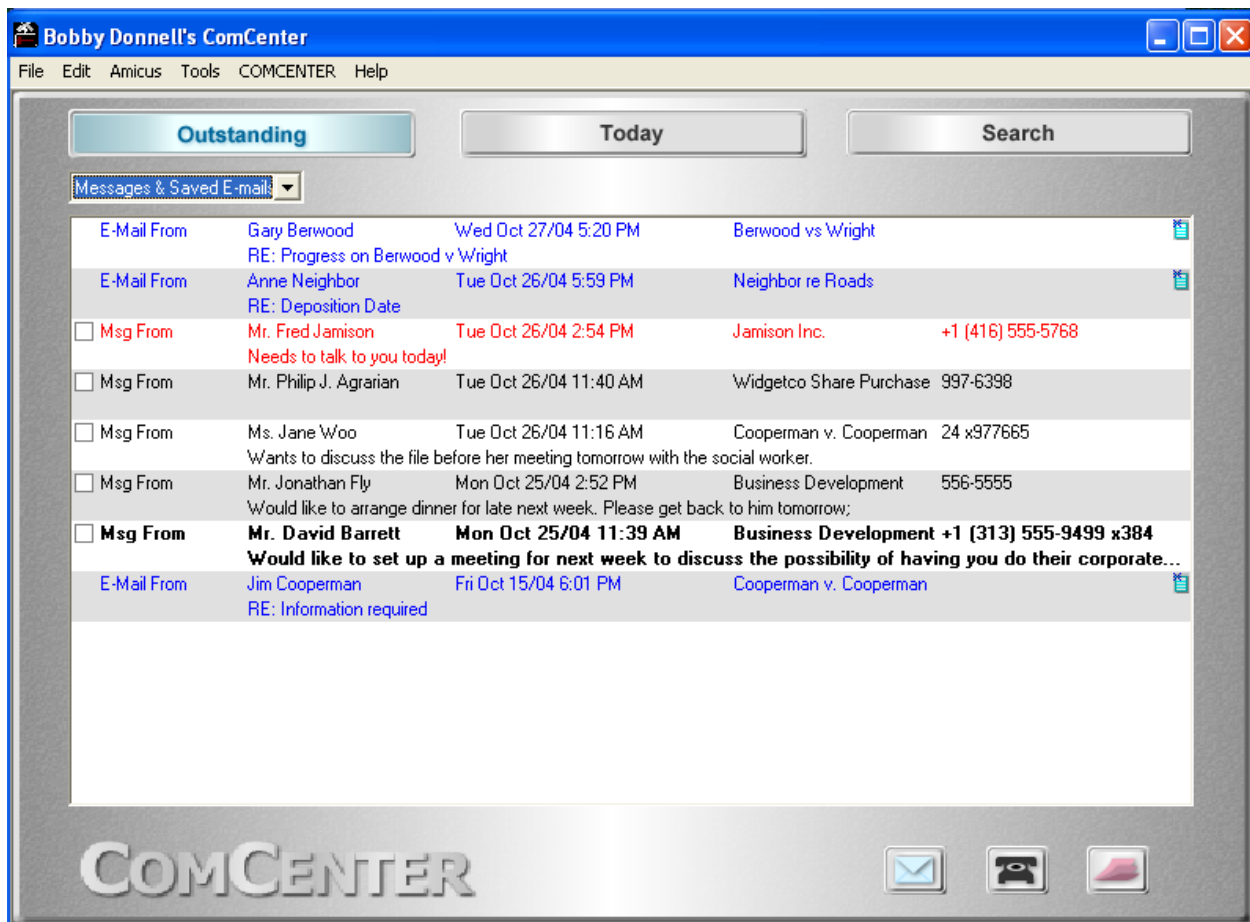
While the earlier section of this paper had us generate a letter and retainer agreement to be mailed to a client, personally I find that I am generating hardly any hard-copy documents today. My world has become increasingly electronic – and I am continually exchanging communications by email. Documents are exchanged in PDF format (Adobe Acrobat's Portable Document Format) rather than on paper or in Word or WordPerfect format – indicating that the people with whom I communicate largely have become electronic rather than paper-oriented. Indeed even the 'papers' for this conference are not printed but rather burned into a CD-ROM – which allows for the inclusion of live hypertext links or interactive spreadsheets. In our jurisdiction, we are now filing land transfer documents electronically in PDF format, and we are already filing documents in the Corporate registry electronically. The greater utility of electronic communications reflects how lawyers are operating in an increasingly digital environment – and how our systems and applications have to adapt accordingly.

So let's start with email. Amicus Attorney works well with Outlook – sharing emails, contacts, calendar appointments and to-do's bi-directionally. In our office, we use Outlook – fortunately, since Amicus 'sits' on top of Outlook, this allows everyone in the office to use Outlook while I use Amicus – allowing me to fully integrate with them (and them with me) but giving me access to all the additional features and functionality available in Amicus Attorney but not in Outlook. In a very real sense, I have *much* greater functionality than they do – due to the fact that Outlook is contact-centric but Amicus Attorney is file-centric – and lawyers work from files, not contacts.

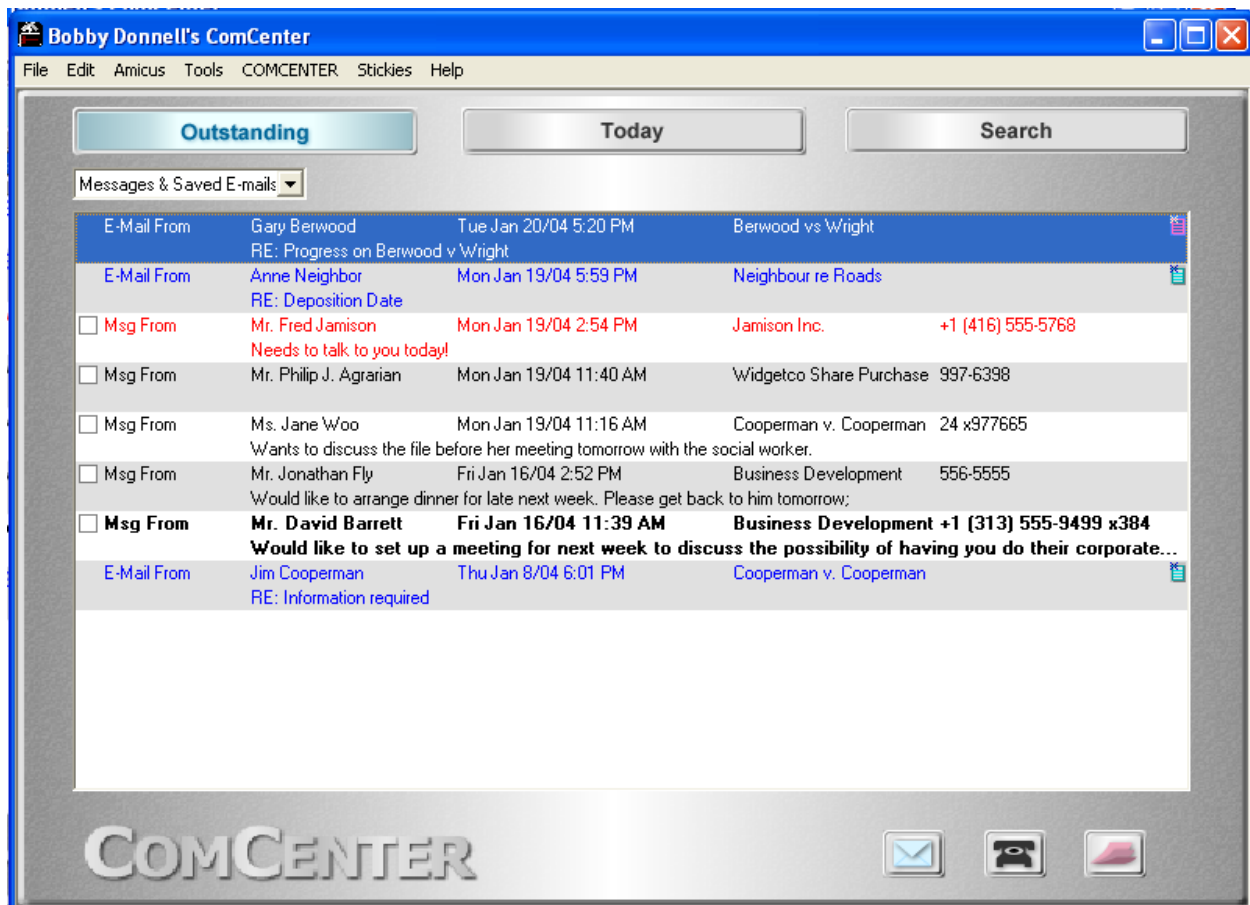
Where do emails go in Amicus? They come into the Communications

module. Let us click on the ComCenter button on the toolbar

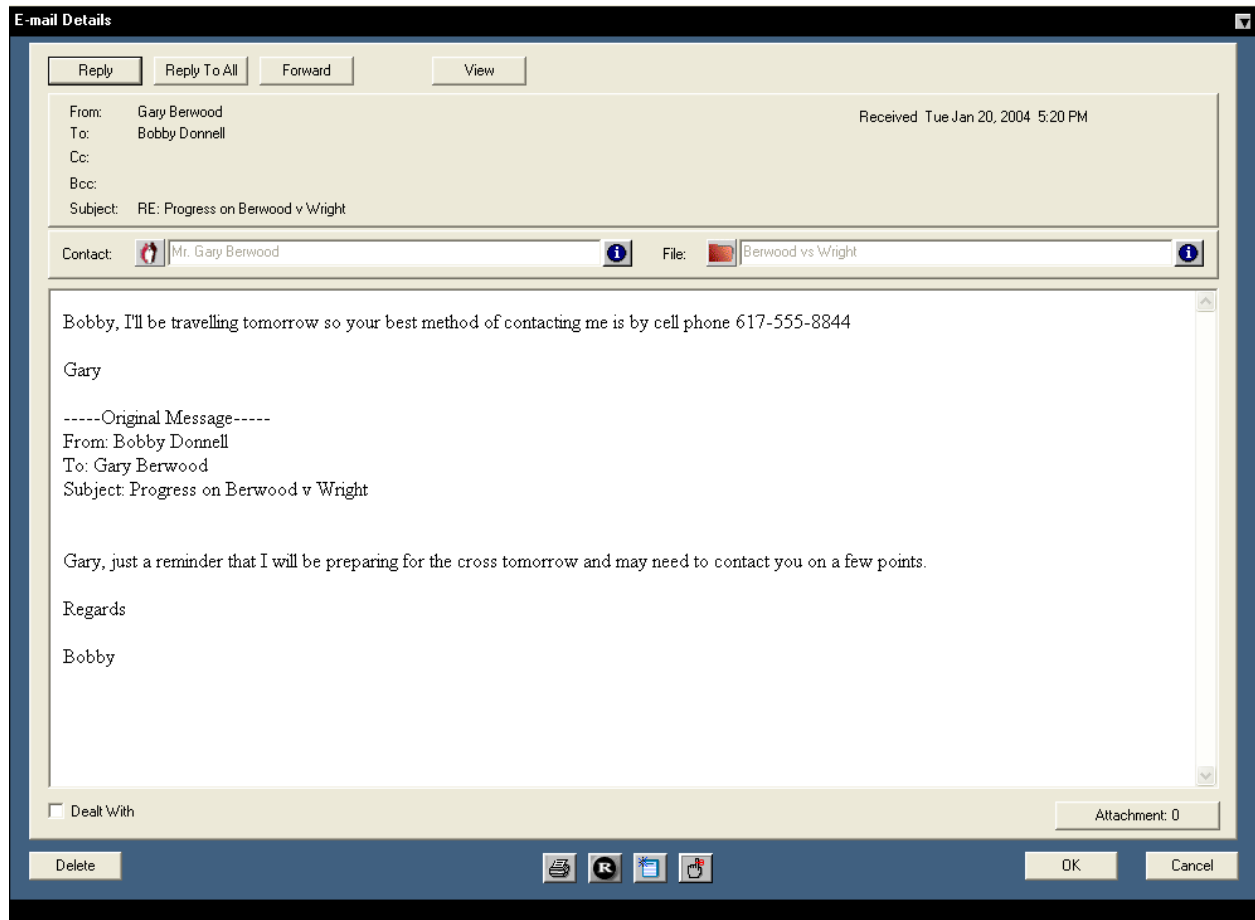






Notice the pull-down menu in the upper left hand side. By clicking on the down-arrow, you can pull up down the menu that allows you to select to see just "Messages", just "Saved E-mails" or "Messages and Saved E-Mails". For our purposes, click on "Messages and Saved E-Mails".






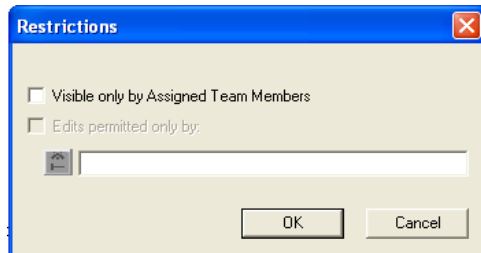
You can see how Amicus brings in telephone messages ("Msg From") and emails into one communication center (Version X extends this to include letters and faxes as well). Double-click on the first E-Mail from Gary Berwood. This opens up this email in Amicus Attorney:





Notice a few things. First, you have all the usual buttons at the top that you would expect with email – Reply, Reply To All and Forward (View opens the email in Outlook). Notice the Amicus Attorney icons – one for the link to the

Contact module  Mr. Gary Berwood showing that this email is shown from Mr. Gary Burwood - but clicking on the icon would allow you to select anyone from your contact database (for example, where the sender may not be the person with whom you wish to associate to the email). The File icon:  Berwood vs Wright shows that this email is linked to the Berwood vs Wright file – and will show up on the 'brad' in the Berwood vs Wright file. If this field was blank, clicking on the file icon would bring up the Files module – allowing you to select the file on which the email would be filed. Amicus will try to do as much work for you as possible – if the sender is in your Amicus database, then the down-arrow in the Files section of the email will bring up a short list of the files on which the sender is associated – and you can select the right one by a quick mouse click.

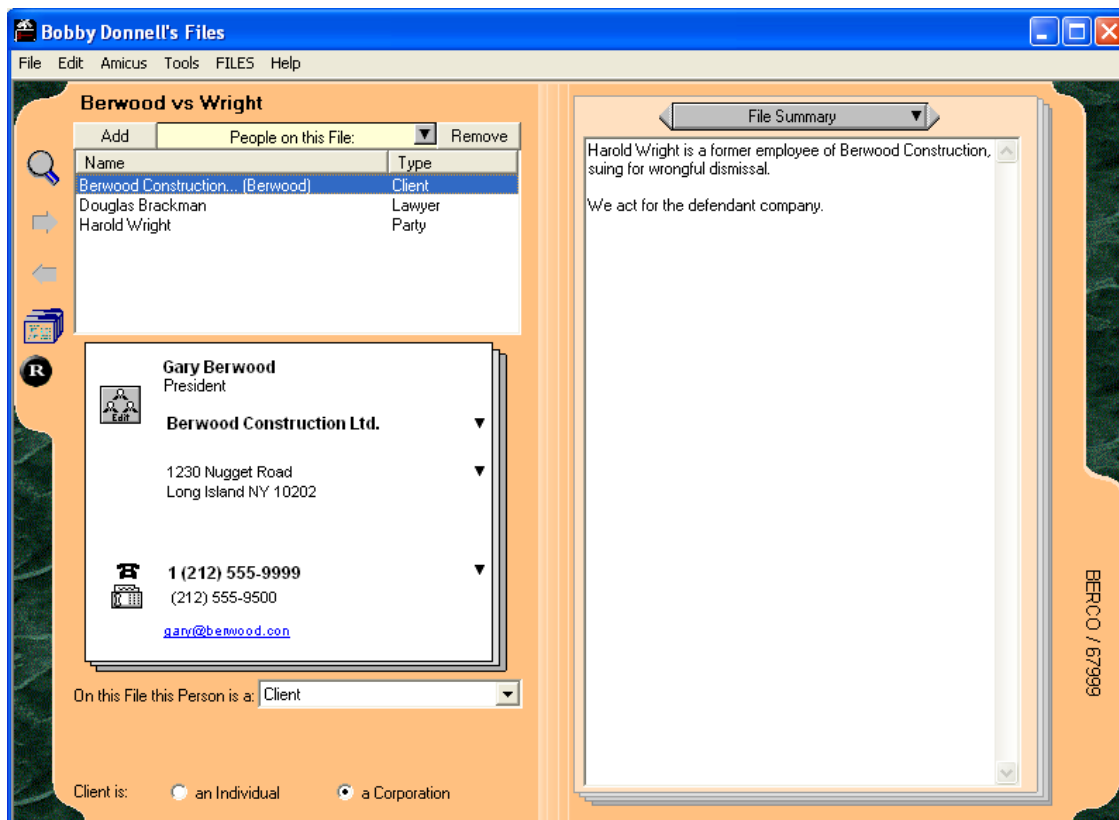
Just a few other things to note. See the  icons at the bottom of the email box. The  sends the email to the printer in case you need a hard-copy. The  allows you to toggle this email as being visible only by assigned team members (for privacy reasons).



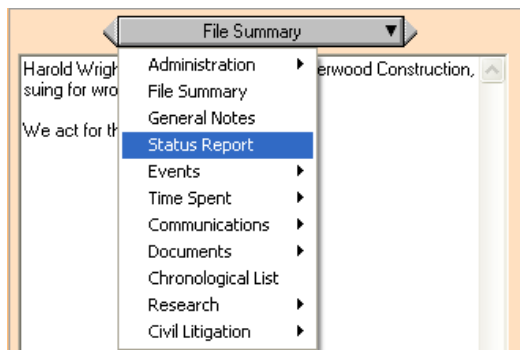
The  icon allows you to do a time and billing entry for handling this email. Lastly the  icon opens an Event dialogue box, allowing you to create a To-Do, or an appointment from this email, thereby taking the email and making it into an 'action item'.

Now we have already 'filed' the email on the Berwood vs Wright file (or rather Amicus Attorney has done this for us). Our next task is to check the status of the file, responding to the email and making a billable time entry.

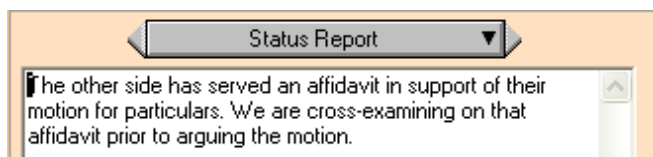
Click on the  (or information) icon within the email. This opens the Berwood vs Wright file:



Now click on the Brad – you will see the Status Report in the pull-down menu:



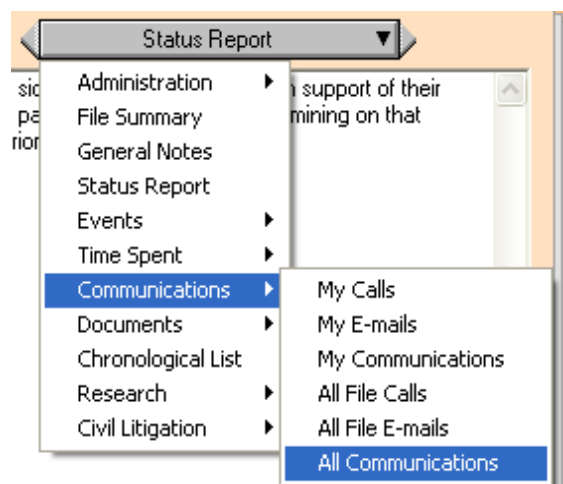
Double-click on the Status report – you will see:



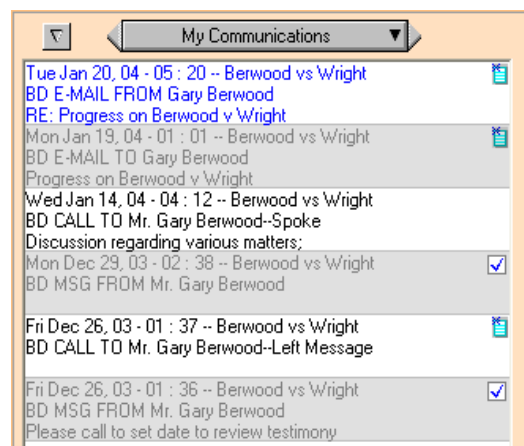


The Status Report is an area on the Brad for the file where anyone who has worked on the file can continually update the status of the file for everyone in the firm to review (\*just in case someone was confined due to SARS or was hit by the proverbial bus on the way to work\*).

There is another way to quickly come up-to-speed on the file – click on the brad and then on “Communications” then on “All Communications”:

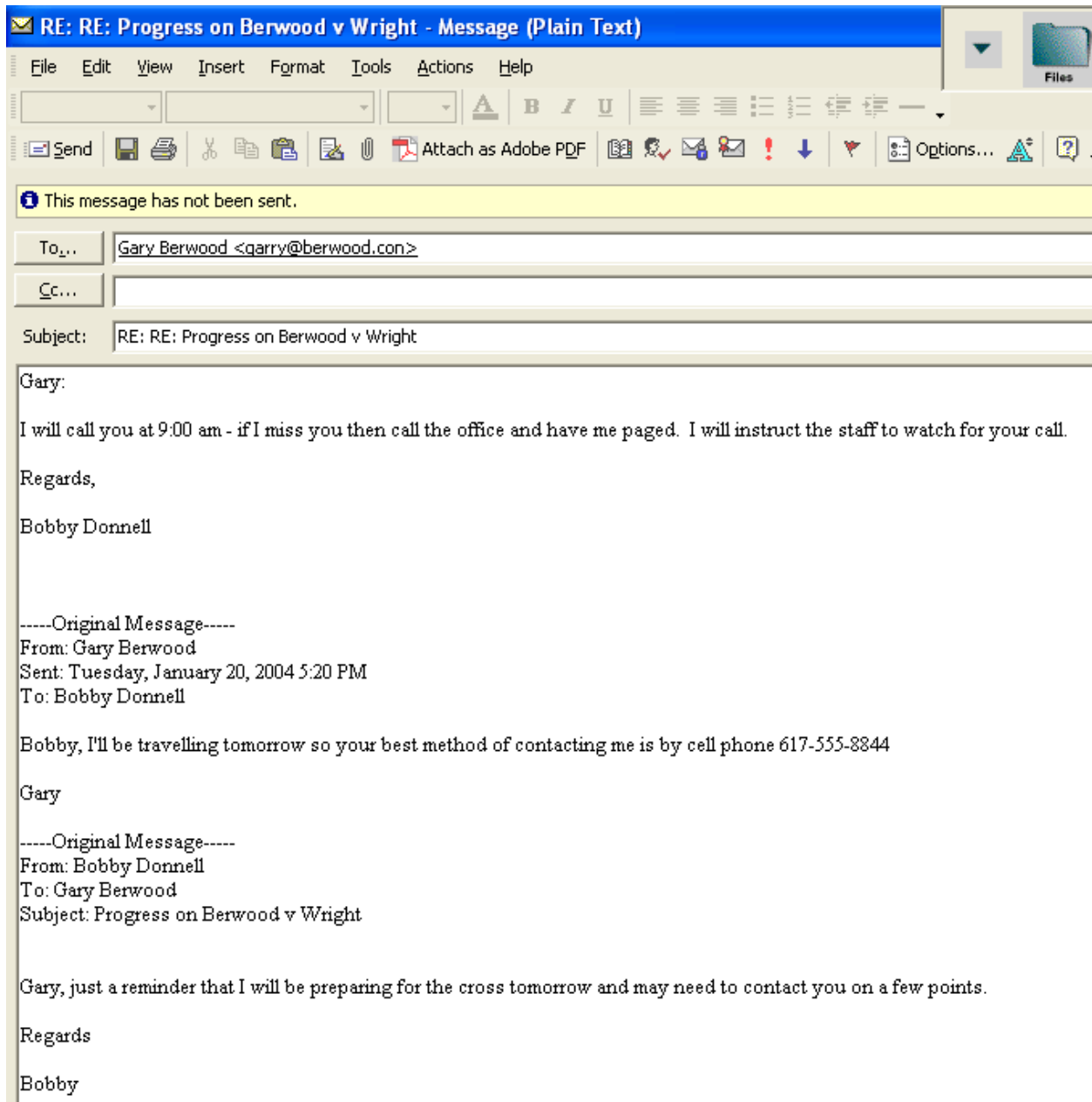


This brings up a list of summaries of all the communications logged on this file – allowing you to scan the telephone calls, messages and emails and get a sense of what is happening on the file (this is my favourite way to stay on top of a file since most lawyers usually confirm when something is to be done on a file by way of a telephone call or email). If your practice is to send these confirmations by way of letter, you would review the “Documents” on the brad instead. Here are the communications on the Berwood vs Wright file:






Clicking on any of these short entries will bring up the full communication for an in-depth review. You can read any of the information on the Brad and do a full overview of the status of the file within Amicus.

Let's return the email. Having reviewed the status of the file, click on "Reply" within the email message. This opens up a reply email within Outlook. In this example, I have typed a reply and I am ready to hit "Send":






This shows the seamless integration between Outlook and Amicus Attorney. The last part of the task is to create a billable time entry. Click on the Time Sheet icon within the email in Amicus Attorney. This opens a Time Entry dialogue box:

**Time Entry Details**



File:  Berwood vs Wright   Today

Client: Berwood Construction Ltd.  
Matter: Berwood Construction vs Harold Wright  
Client ID: BERCO Matter ID: 67999

Category:  Billing Rate:   
Billable Normal (Default Rate)

Activity code:   
None

Activity Description:  
E-mail correspondence with Gary Berwood, review of status of file, email  
reply to Gary Berwood.

Delete   0.40 OK Cancel

Entered at 20:06 Jan 18; last modified 20:08 Jan 18

In this case I have entered a description of the tasks and entered 0.4 as the billable time – you could also have used the Timer within Amicus to track this time as well by clicking it 'on' at the start of the task and allow it to collate the time on this file/task. This task is now complete when you click on "OK". All emails have been logged within Amicus Attorney for future reference, the billable time is entered on the daily billable time sheet and Outlook is used for sending and receiving all email, integrating this information with the files maintained in Amicus Attorney.

## Task 4 – Start a New Day

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### **A lawyer's routine to start the day reviewing deadlines, limitations, communications and to-do's.**

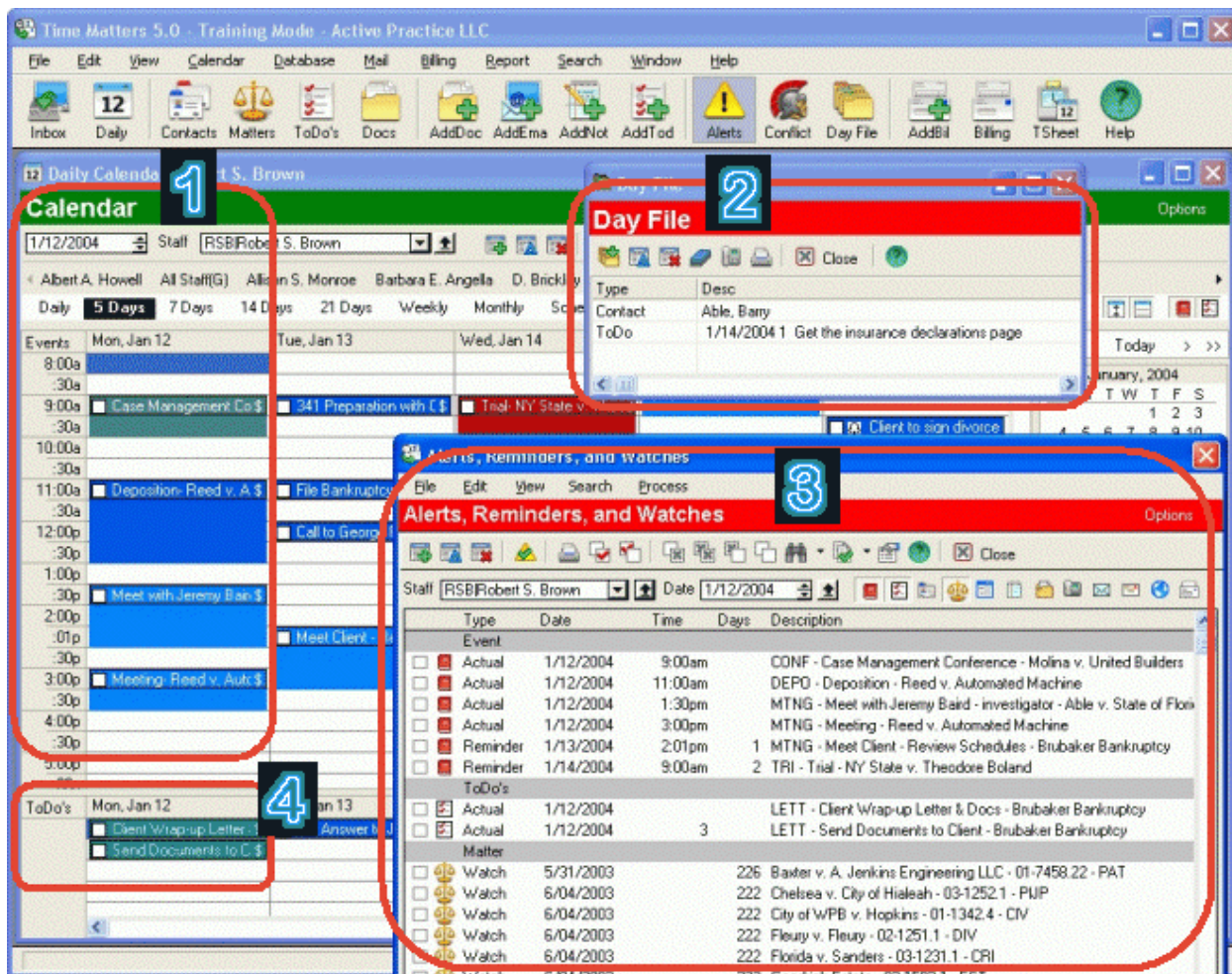
Keeping up with multiple deadlines and tasks on many different tasks can be very difficult. Practice management products excel in their ability to neatly organize and manage the tasks and deadlines that must be handled to complete all work necessary on a legal matter. Here is how both Amicus Attorney and Time Matters sort and sift through all your files and give you, all in one place, all the information you need to complete all current tasks and meet all imminent deadlines:

### **Task 4 – Time Matters**

At the start of your day, you want to know:

- What is important *now*?
- What is right around the corner?

Three views in Time Matters help you start your day. In the next few pages, we highlight these individually customizable views. Using menu-driven settings, we have tailored some of the views. All three are shown in the screenshot, below.



1. Calendar – See today's Events and look ahead to the week.
2. Day File – A personal list, like a yellow sticky
3. Alerts, Reminders, and Watches – A "fail-safe" hot list
4. To-Do's – Tasks scheduled for this date

We will look at what these Time Matters tools can do for you.

## Calendars in Time Matters

You choose your main calendar view: Today, Multiple Days, a Week, or a Month. The calendar can show just your schedule, just your workgroup's schedules, just the lawyers' schedules, or the entire staff's schedules.

The 5-day view of one lawyer's calendar may look like this:

1. Your name appears in the Staff field. You can easily check other people's calendars by choosing another name here.
2. Your appointments appear in color-coded time blocks. Double-click any one for full details. Drag-and-drop to move an appointment.
3. Each day's ToDo's appear at the bottom of the Calendar.

**Daily Calendar Robert S. Brown**

**Calendar**

1/13/2004 Staff RSB|Robert S. Brown

Albert A. Howell All Staff(G) Allison S. Monroe Barbara E. Angella D. Brickley Dan T. Miller David B. Halomar

Daily **5 Days** 7 Days 14 Days 21 Days Weekly Monthly Scheduler

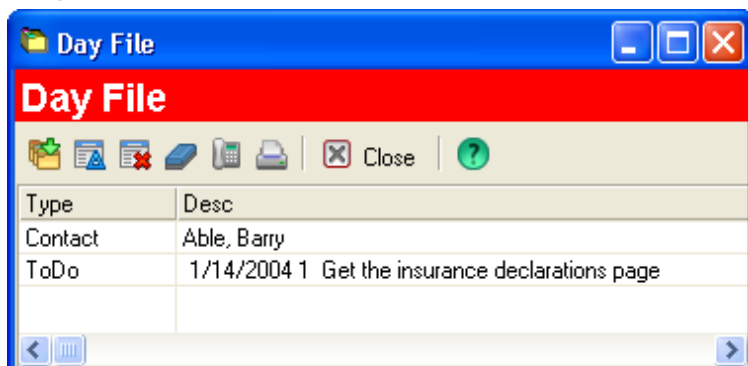
Events	Tue, Jan 13	Wed, Jan 14	Thu, Jan 15	Fri, Jan 16
8:00a				
:30a			<input type="checkbox"/> Discuss Possible Infringe	
9:00a	<input type="checkbox"/> 341 Preparation with C \$	<input type="checkbox"/> Trial- NY State v. Theod		<input type="checkbox"/> Client to sign divorce
10:00a			<input type="checkbox"/> Conference with client- C	
11:00a	<input type="checkbox"/> File Bankruptcy- Brub \$			<input type="checkbox"/> Monthly Partner Meeting
:30a				
12:00p	<input type="checkbox"/> Call to George Rand re- l			<input type="checkbox"/> Planning for Next Year- l
:30p				
1:00p			<input type="checkbox"/> Prepare and attend hear	
:30p				
2:00p				<input type="checkbox"/> Depose Witness to Assa
:01p	<input type="checkbox"/> Meet Client - Review \$ \$			
:30p				
3:00p		<input type="checkbox"/> Meet with 3 sons to di \$		
:30p				<input type="checkbox"/> Meet with Staff - Revisio
4:00p		<input type="checkbox"/> Initial Client Meeting	<input type="checkbox"/> Initial Client Meeting	
:30p				
5:00p				
:30p				
ToDo's	Tue, Jan 13	Wed, Jan 14	Thu, Jan 15	Fri, Jan 16
	<input type="checkbox"/> File Answer to Jenkins \$	<input type="checkbox"/> Discovery requests se \$	<input type="checkbox"/> Get medical records fr \$	<input type="checkbox"/> Change para 5- Able v. \$
		<input type="checkbox"/> Get the insurance dec \$	<input type="checkbox"/> File Answer to Jenkins \$	<input type="checkbox"/> Arrange for Appraisal- \$
			<input type="checkbox"/> Setting Meeting with Clie	

Part of the Multi-Day Calendar View



## The Day File – a Personal “Hot” List

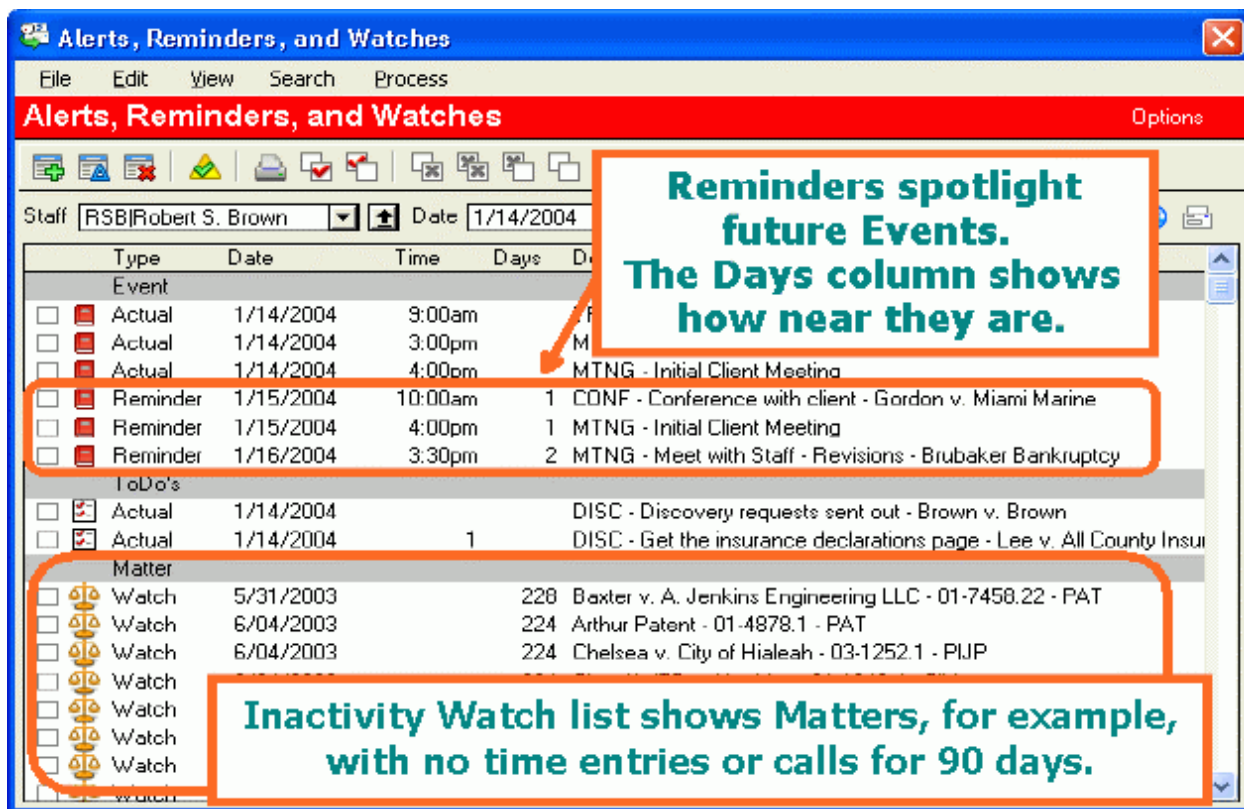
When you want to focus on several important things each day, the Day File can help you. It can be your “hot” list. The Day File can contain links to Phone Calls, ToDo's, Emails, Clients, Documents, really anything you need to respond to.



The Day File – a “Yellow Sticky” hot list

In Time Matters you can Double-click on any item to see its details. After you handle an item, you remove it from the Day File.

## Alerts, Reminders and Watches



The Alerts, Reminders and Watches window is available with one click.



It allows you to focus on today's activities as well as jog your memory about other things that may need attention. As upcoming Events are entered into your Calendar, you can have reminders set with varying lead times that depend on the type of Event.

For example, you may want to be reminded of a CLE Seminar twice: once in time to cancel and still receive a refund and again the day before. For a major client meeting requiring extensive preparation, you set multiple reminders, such as 14, 7, 3, 2 and 1 day in advance.

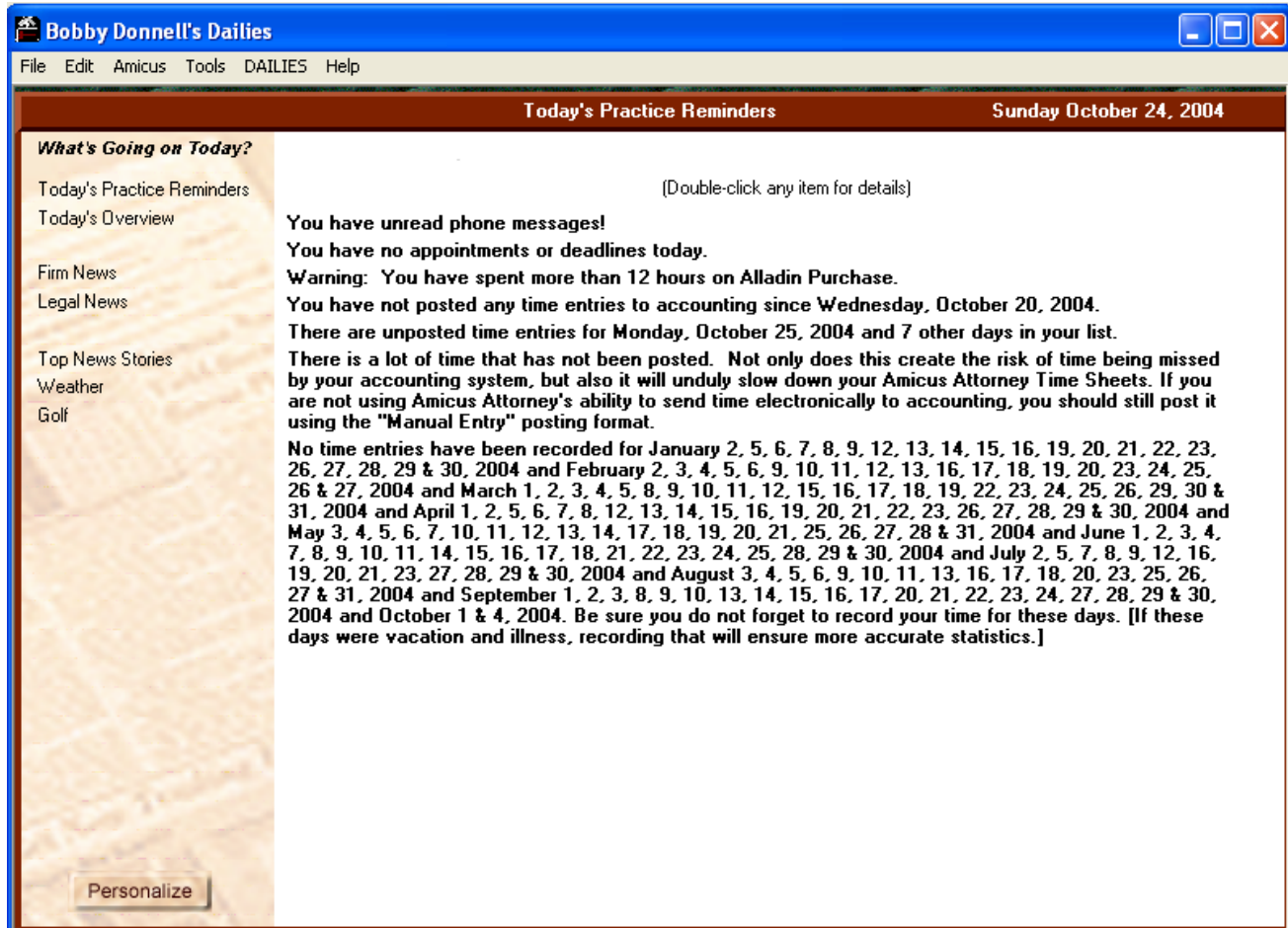
### **Keeping on Track during the Day with Time Matters**

During your workday, you may spend most of your time at the PC with Emails and documents. With Time Matters running, you can quickly switch to your Calendar, Day File, and Alerts screens to keep your important priorities in mind. You can be more relaxed when you do not feel as though you have to keep everything in your head and are not at the mercy of sticky notes and elusive paper lists.

## Task 4 – Amicus Attorney

Practice management software should give you the big picture, the 50,000 foot view, on your practice and firm. Here are Amicus Attorney's ways of doing this:

First we start with the Dailies. There are two screens to the Dailies – the first is "Today's Practice Reminders" that sums up "What's Going on Today?" Here is what it looks like:



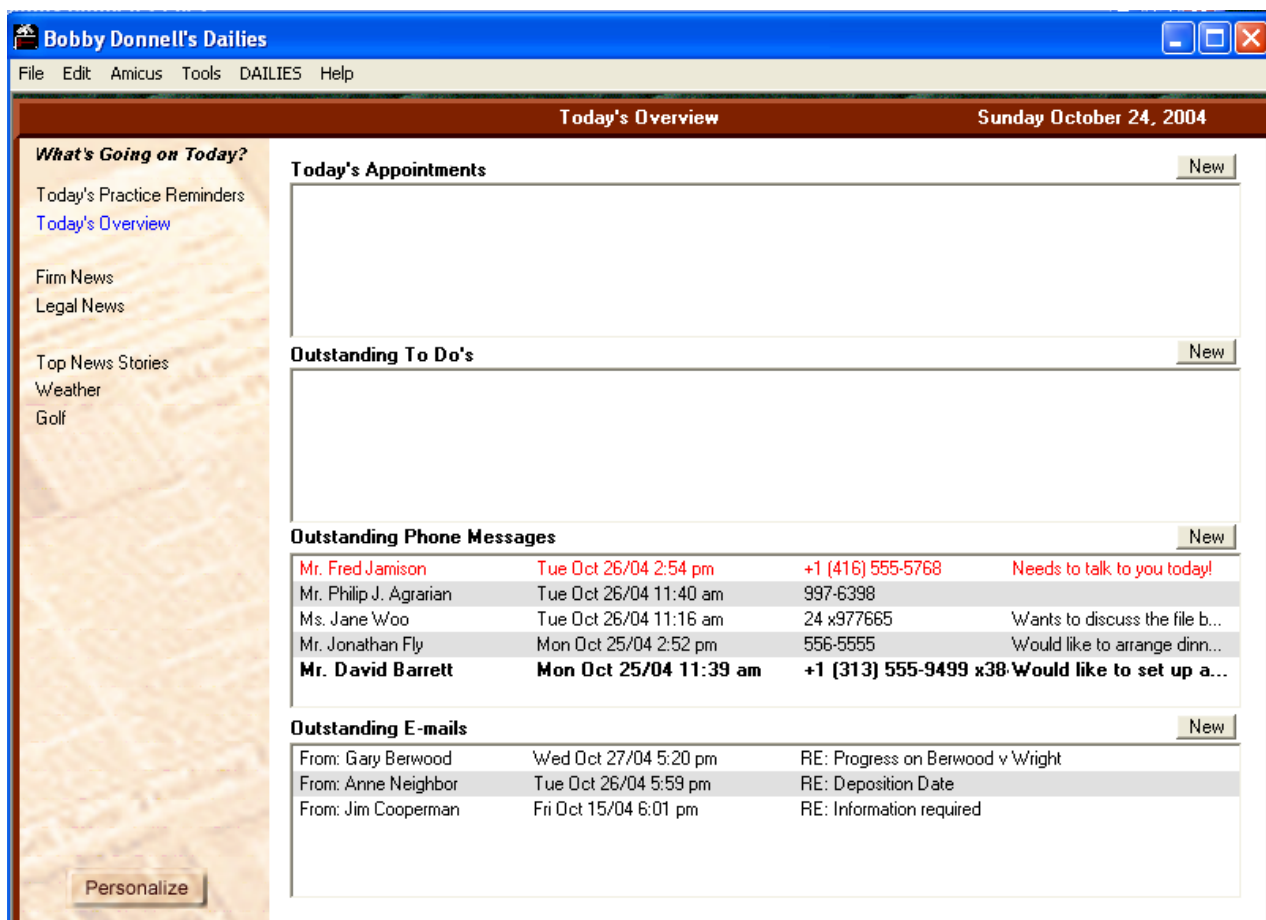
The Dailies quickly gives you a summary of your day (phone messages that you have not opened and read, upcoming appointments and deadlines from your calendar and To-Do list) and of things that need doing – such as posting unposted time to your accounting system. It also tells you when you have forgotten or neglected to make any billable time entries for any business days. It will also tell you that you have hit a billable time 'ceiling' on any files for which you designated such a limit – thereby warning you that a discussion with your client about this file is in order. Double-clicking

on any of these entries takes you to the details regarding these entries – such as opening the Alladin Purchase file.

This is the default view for the Dailies – but if you click on “Dailies” in the menu:

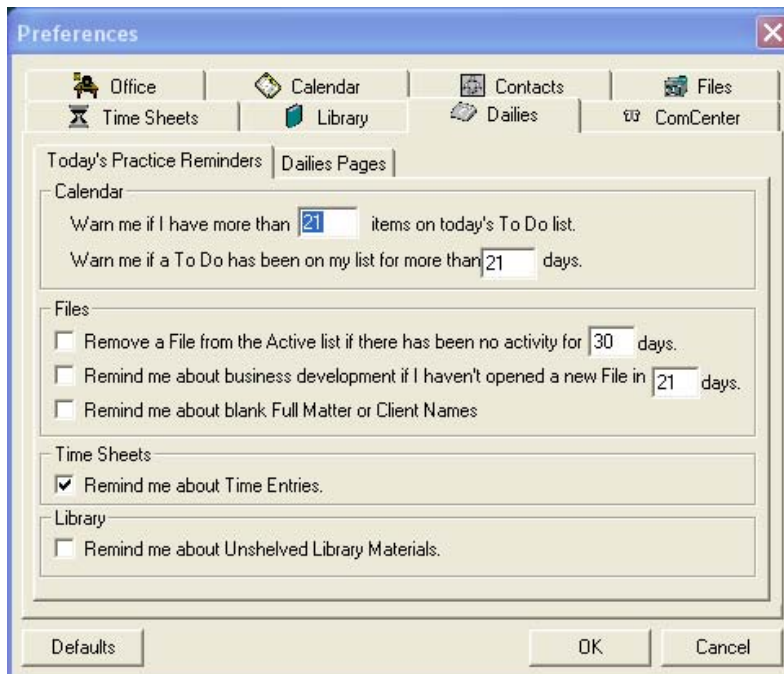


and then click on “Today’s Overview”, you can open up a different view that looks like this:



As you can see, this view provides you with a detailed overview of today's Appointments, Outstanding To Do's, Outstanding Phone Messages and E-Mails. This view allows you to start visualizing your day and how to set and attack your priorities.

These are the default views – however, “The Dailies” can be customized by clicking on the **Personalize** button on Preferences:



Here you can customize The Dailies (\*and other aspects of Amicus Attorney by using the other tabs). Let us overview what I have found are the more important items:

1. Calendar: Warn me if I have more that 21 items on today's To Do list: The “warning number” can be designed by you – the idea is to prevent your To Do list from growing to an unmanageable size. This allows you to prevent your To Do list from becoming a parking lot of good intentions...
2. Files: Check Remind me about business development if I haven't opened a new File in X (in this case, 21) days. Sometimes you can get so caught up in working on current files that you lose touch with the fact that you need to continually add new files to the hopper. This is a marketing prompt!!

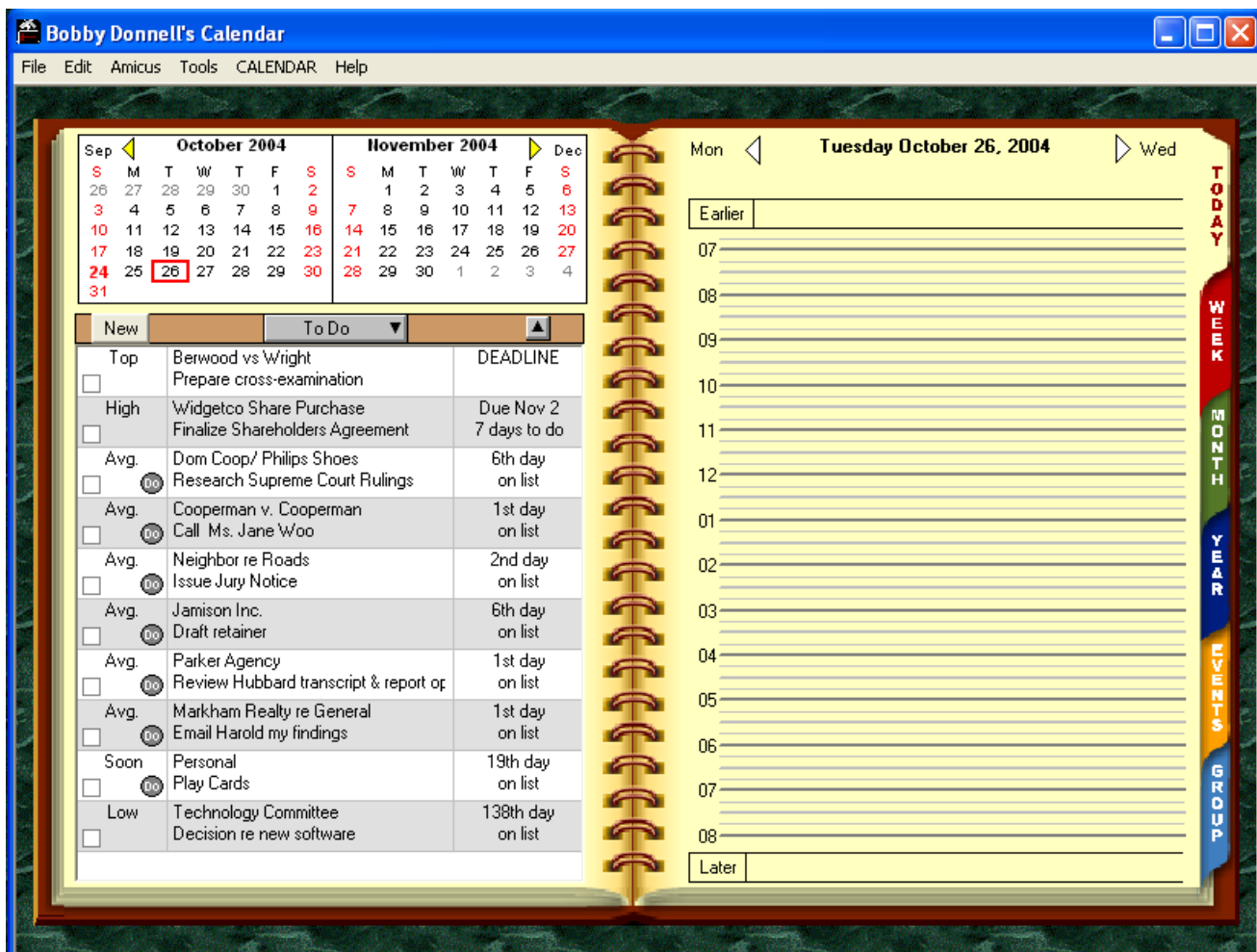
3. Time Sheets: Remind me about Time Entries. This prompts you to keep your time entries current (by not allowing business days to go by without any billable time entries) and to post your time entries into the accounting system.

You can explore the remaining tabs in this screen to customize any of the other modules of Amicus Attorney.

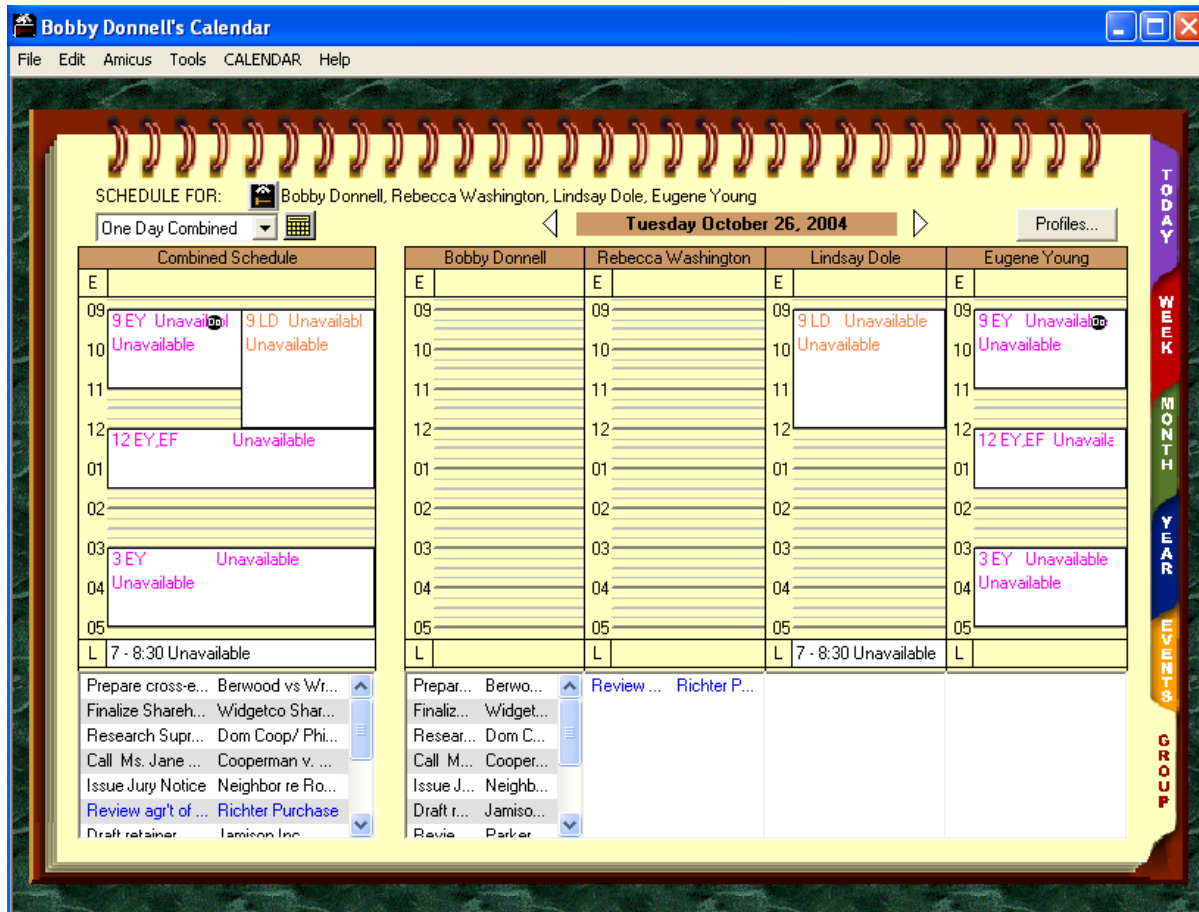
Let us return to keeping a 50,000 ft view on your practice and firm. The Dailies allows you to look at you own day – but the Group Calendar function allows you to get a quick overview into everyone else's calendar



appointments. Click on the Calendar icon in the toolbar . You will see:



Notice the "Group" tab on the lower right-hand side. Click on it.



Here you see a combined schedule on the left-hand side and everyone's individual calendar on the right. The combined schedule can be used to schedule group meetings (use your mouse to "click and drag" between 2 pm and 3 pm and you will see that you have just created an appointment that will be shown in EVERYONE's schedule that is "Assigned" to the appointment as follows:

**Event Details**

Title:  ☐ Critical Appointment

Date:  Time:  to

File:  Remind me:  minutes before

Contact:  Category:

Assigned:

Repeat:  Link:

Assist:  Assistance Setup...

Notes:

Delete

Last modified on Mon, Jan 19, 2004 11:49 AM

This is a great way to save time scheduling an office meeting! (You can even assign a client, a room, or an office administration file to the appointment, such as "Alladin Purchase" or "Staffing" or "Holidays" etc...

Let's go back to your own calendar for a moment:

**Bobby Donnell's Calendar**

File Edit Amicus Tools CALENDAR Help

Sep **October 2004** November 2004 Dec

S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
26	27	28	29	30	1	2	7	8	9	10	11	12	13	14	15	16	17	18	19	20
3	4	5	6	7	8	9	14	15	16	17	18	19	20	21	22	23	24	25	26	27
10	11	12	13	14	15	16	21	22	23	24	25	26	27	28	29	30	1	2	3	4
17	18	19	20	21	22	23	28	29	30	1	2	3	4							
24	25	26	27	28	29	30														
31																				

New To Do

Priority	Task	Due Date
Top	Berwood vs Wright Prepare cross-examination	DEADLINE
High	Widgetco Share Purchase Finalize Shareholders Agreement	Due Nov 2 7 days to do
Avg.	Dom Coop/ Philips Shoes Research Supreme Court Rulings	6th day on list
Avg.	Cooperman v. Cooperman Call Ms. Jane Woo	1st day on list
Avg.	Neighbor re Roads Issue Jury Notice	2nd day on list
Avg.	Jamison Inc. Draft retainer	6th day on list
Avg.	Parker Agency Review Hubbard transcript & report of	1st day on list
Avg.	Markham Realty re General Email Harold my findings	1st day on list
Soon	Personal Play Cards	19th day on list
Low	Technology Committee Decision re new software	138th day on list

Mon **Tuesday October 26, 2004** Wed

Earlier

07

08

09

10

11

12

01

02

03

04

05

06

07

08

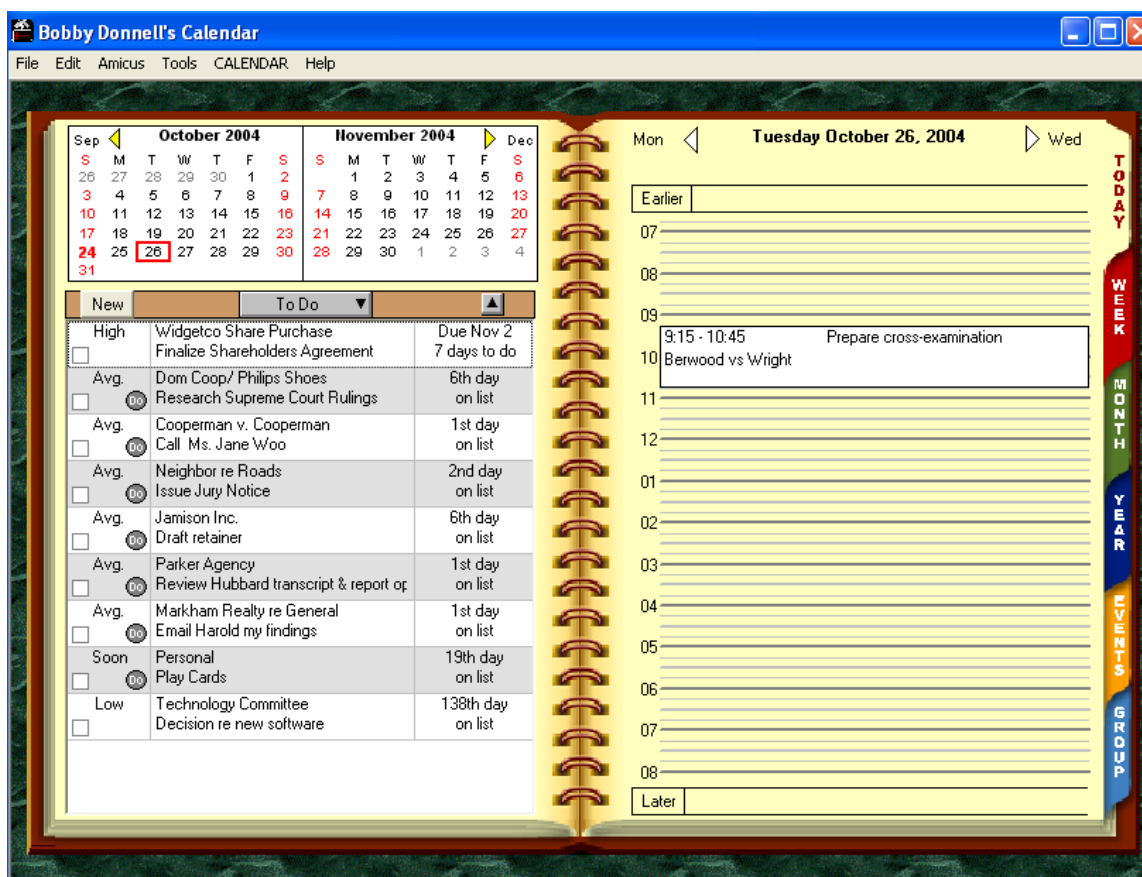
Later

TODAY WEEK MONTH YEAR DECADE



I would like to point out a few things: First the To Do's: Note that Amicus ranks the To Do's in order of whether they are Past-Due (with a count on how many days past-due), Due Today or due at some time in the future (with a count up to the due date). There are also To Do's that do not have any assigned due date, in which case Amicus counts the number of days that they are on the list (such as the Technology Committee decision on new software that has been on the list for 138 days!).

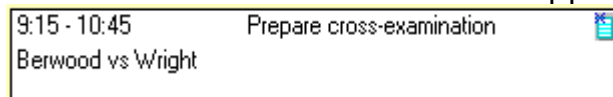
Here is a quick way to schedule your To Do's and make time to actually DO them: Highlight a To Do with your mouse (such as the Berwood vs. Wright prepare cross-examination entry) by clicking once on it with your mouse. Now Click on this highlighted To Do and "drag" it with your mouse over to your calendar and "drop it" into your calendar as follows:



Now double-click on the appointment (with yourself!) to work on the Berwood vs. Wright cross-examination – this allows you to change the default appointment time and schedule it instead from 9:15 am to 12:15 pm. Why do this? First, a good time management tip is to schedule To Do's as appointments – allowing you to manage your time by your priorities



rather than otherwise. Secondly, because this time is shown in the Group Calendar in the office, everyone can see that you have set aside this morning to work on this file – and hopefully will respect this and check the Group Calendar in Amicus Attorney before interrupting you – allowing you to work in peace! This drag and drop feature is useful to take a phone call – convert it into a To Do using the icon, then drag and drop it into an appointment and then when you have finished, click on the little blue billable time sheet icon shown in the upper right-hand side of the appointment



and that will create a billable time entry. This is a great way to use the workflow features of Amicus Attorney to save time and keystrokes!

This is a quick overview of how Amicus Attorney keeps you on top of your Day, your To Do's (including your limitation and Bring Forward reminders), your appointments and communications. Of course, for a more detailed overview of your day, you could open up the Calendar and the CommCenter, to review the details of your appointments and your outstanding telephone calls, messages and emails. I generally find that I use this method – by opening the Calendar and the CommCenter – to organize my day – by quickly looking at my To Do's, my appointments and my outstanding telephone calls – and then deciding what it is that I should be doing to make the best use of my time that day. And I do 'drag and drop' To Do's into my calendar – to reinforce that I want to use my day to attack that particular task!

## Summary of the Products:

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This section contains some basic information on the two practice management products covered in this paper.

### Time Matters Summary

#### What versions of the product are available?



#### **TimeMatters 6**

Business / Practice Management, Simplified.

The Professional Edition includes Time, Information, Billing, Document, and Communication Management features, plus networking and links to industry-leading programs for billing/expense control, document automation and management.



#### **BillingMatters 6**

Sometimes, the name says it all.

Billing Matters 6 Plus Accounting works inside Time Matters or separately. Firms needing basic billing can generate a bill and post a payment in one easy step while firms needing advanced billing can use split, flat, consolidated, and allocated fees, plus trust accounting, budgeting, productivity reporting, and more.



#### **BillingMatters 6 Plus Accounting**

The perfect marriage of the front office and back office.

Billing Matters 6 Plus Accounting adds full back office accounting to the Billing Matters standard feature set. It includes complete accounts payable and receivable, a flexible general ledger, check writing and reconciliation, and more.



#### **TimeMatters World Server 6**

Business and Practice Management for the web.

World Server 6.0 gives you access to your practice management information through the Web. It has a nearly identical interface and the same core functionality as the Time Matters desktop application, and they work together. The World Server browser version shares your practice management database in real-time with your desktop version of Time Matters.

## Key Improvements in Time Matters 6.0

Version 6.0 of Time Matters was released in the Fall of 2004. Key improvements include:

### New Outliner/Case Planner/Project Planner

Create Outlines to lay out tasks, activities, plans, logic, etc. to specify entire work flows related to cases and projects. The work flows can then be converted in to Time Matters records (Events, ToDos, Email, Documents, etc) to execute on the Outline as part of day-to-day activities. Outlines can be exported to Word.

### Integration with LexisNexis CourtLink Docket Search

Seamlessly integrate information from LexisNexis' database of over 200 million court records (CourtLink services required) into Time Matters.

### TM Connect

Integration between Outlook and Time Matters providing high level functions of practice management directly from your Outlook email screen. Now TM Save, TM Open, and the TM Insider work directly from your Outlook email screen.

### Integration with LexisNexis Martindale-Hubbell Lawyer Locator

Perform a Martindale-Hubbell Lawyer Locator search directly from a Time Matters name field. Instantly get background information on other lawyers.

### Time Matters Synchronization for BlackBerry

Synchronize, via Cable and "Over The Air," Time Matters data to BlackBerry Wireless Handheld devices.

### Send to Excel

With one click, you can send Time Matters List information to Excel for further processing or analysis.

### Check for Duplicate Contacts & Combine Duplicate Contacts

Eliminate duplicate records and easily combine two or more contact records into one Contact Record, including sub-records and attachments.

### Security Setup Exceptions

Even more security control... now create Security exceptions on a Client/Contact and Matter/Project basis.

### Security Groups & Profiles

Maintain security by group and by profile, greatly simplifying security setup where there are larger numbers of users.

### Entry Form Tabs

Create and customize Entry Form tabs on all record types. Previously tabs on the Entry Forms were limited to the 4 Main record types; now Form tabs are available on the Supporting record types.

### **Enhanced Specified Relations of All Record Types**

The Time Matters Related Records feature now works for both Main and Supporting record types, not just the 4 Main record types as in previous versions. Now in addition to seeing all the Related Records for a Client/Contact and/or Matter/Project, you can see all the Related Records to a Document, Note, Email, Phone Call, etc. There is even a new drag and drop capability for Specified Relations.

### **Messenger Enhancements**

Instant Messenger now has PowerViews, User Groups, Tag and Process, Archiving, Send Deleted Messages to the Time Matters Recycle Bin, and can be Synchronized to remote Time Matters databases.

### **TM Save**

One of Time Matters most popular features, TM Save, with its ability to save a document directly to Time Matters Document Management from Word and WordPerfect, is now also available within Excel XP/2003, and Adobe Acrobat 5.0/6.0.

### **Exchange Server Real-Time Synchronization**

Automatically, in background, synchronize Calendars, Tasks, and Contacts between Microsoft Exchange Servers (i.e., networked Outlook) and Time Matters.

### **TM Save of Email Attachment Results in a Specific Relation Type Related Record**

Specified Relations between the email record and the attachment are now just a click away.

### **Improved Spell Check Engine**

Now Time Matters includes a Legal dictionary and more options for automated spell checks.

### **Selectable Multiple Toolbars**

Create multiple customized Main Toolbars to help maximize efficiency. Simply right-click on the Toolbar to select another set of Toolbar buttons. This allows each user a high degree of customization and helps navigate now that Time Matters includes both front office and back office functionality.

### **Quick Tab Enhancements**

The color and shape of Quick Tabs can now be customized. For example, urgent items can have a red Quick Tab, items to be billed can be green, etc. Quick Tabs are now available on Entry Form sub-lists.

### **Staff Selector Colors for Calendars**

Users can easily identify to whom calendar appointments apply now that the Staff Selector buttons can be set to match the same color as the Staff Events and ToDos on the calendars.

### **Email Enhancements**

Email now supports additional HTML features, MIME embedded graphics, additional spell check options, and new User Groups and Distribution lists.

## Time Matters 6.0 Professional Edition

This Edition includes Time, Information, Billing, Document, and Communication Management features, plus bulletproof networking and the best links to industry-leading programs for billing/expense control, document automation and management.

## Time Matters 6.0 Enterprise Edition

The Enterprise Edition of Time Matters running advanced client server technology for large networks, or small networks with large databases. Enterprise Edition is the same as the Professional Edition except that it uses the Microsoft MSDE database or Microsoft SQL Server Version 7 or 2000 Database Engine.

## Billing Matters 6.0 plus Accounting

Billing Matters™ 6.0 Plus Accounting adds full back office accounting to the award-winning Billing Matters standard feature set. Get complete accounts payable and receivable, a flexible general ledger, world-class check writing and reconciliation, and more.

## Time Matters World Server 6.0

World Server 6.0 gives you access to your practice management information through the Web. It has a nearly identical interface and the same core functionality as the Time Matters desktop application, and they work together. The World Server browser version shares your practice management database in real-time with your desktop version of Time Matters.

## What does Time Matters cost?

New Customers Version 6.0		
Product	First User	Add'l. User(s) Ea.
<a href="#">Time Matters</a>		
Professional	\$350	\$200
Enterprise (SQL)	\$700	\$400
<a href="#">Billing Matters</a>		
Professional	\$350	\$200

Enterprise (SQL)	\$700	\$400
Time Matters/Billing Matters Bundle		
Professional	\$525	\$300
Enterprise (SQL)	\$1050	\$600
<u>World Server</u>		
<b>Level 1 Server</b> (1-50 Users) Non-Distributed Database / Non-Distributed World Server	\$1,500	\$400
<b>Level 2 Server</b> (1-150 Users) Distributed Database / Non-Distributed World Server	\$4,500	\$400
<b>Level 3 Server</b> (1-500 Users) Distributed Database / Distributed World Server	\$9,500	\$400
<b>Level 4 Server</b> (1-2000 Users) Distributed Database / Distributed World Server / Fault-Tolerant Cluster	\$19,500	\$400

See the Time Matters website, [www.timematters.com/sales](http://www.timematters.com/sales) for details and the latest information.

mation.

### What types of practice is the product suited to?

Time Matters is suited to law firms and departments of all sizes:

- **Small Firms** – Time Matters handles a variety of practice specialties in one application to serve each practitioner in the firm. No separate database software needs to be purchased and updated: Time Matters Professional runs on a shared network hard drive on Microsoft and other networks or peer-to-peer on an available PC.
- **Solo Practitioners** – A solo can take the law practice along anywhere in a laptop. Over the Internet or back at the office, the attorney can synchronize everything for the purpose of sharing with assistants and backup.
- **Multiple-Office Firms** – Time Matters can synchronize multiple locations, including lawyers' home offices, using one of several approaches. For larger firms, SQL databases can update each other regularly. For smaller firms, Time Matters synchronization keeps far-flung offices and laptops up to date.
- **Very Large Firms** – Running on Microsoft SQL Server, Time Matters handles hundreds of users in one or multiple locations. With World Server, the firm can host the main Time Matters database on its own

premises and also make it available, subject to strong security, over the Web.

**Practice Areas** – Time Matters includes customizations for the following:

- Bankruptcy
- Construction Law
- Corporate
- Elder Law
- Employment
- Estate Planning
- Insurance Defense
- Intellectual Property
- Personal Injury
- Real Estate
- Tax Law
- Transactional
- Workers Compensation

Many other practice areas may be served using the customization features that require no programming.

### Links to Other Products

Time Matters serves as your computer's center of operations. It links to a long list of software programs regularly used by lawyers and staff.

Version 6 puts useful new icons on the toolbars in Adobe Acrobat (full version), MS Excel, MS PowerPoint, and MS Internet Explorer.

<b>HotDocs</b>	32-bit version of HotDocs versions 4.0a, 4.1, 5.0, 5.1, 6.0.
<b>Juris</b>	version 1.40.0.068 or 2.x
<b>LexisNexis</b>	LexisNexis Research requires a valid LexisNexisw account. Setup for LEXLink is on the application CD and is activated in time Matters at Program Level Setup.
<b>Outlook</b>	Microsoft Outlook 2000 or later.
<b>Pocket Outlook</b>	Microsoft Pocket Outlook running on the CE 2.01 operations system, or later. The link was tested on Pocket PCs (HP Jornada, Casio Cassiopeia, Compaq iPAQ, and the Toshiba e740).
<b>PaperPort</b>	32-bit version of PaperPort Deluxe or Visual Explorer.
<b>Palm Handheld</b>	Any device using the Palm Operating System (for example, Palm III, Palm V, Handspring Visor) and the HotSync Manager (ships with Palm devices). No additional software is required, for example IntelliSync.
<b>BlackBerry Desktop</b>	BlackBerry Desktop Manager 3.6
<b>BlackBerry Handheld</b>	The BlackBerry Link requires Java Enabled BlackBerry Wireless Handheld such as the Color BlackBerry Wireless Handheld - 7200 Series, 7510, 7730, 7750, and 7780, or the Monochrome BlackBerry Wireless Handheld - 5810, 6200 Series, 6510, 6710, 6750.

<b>PCLaw</b>	PCLaw 32-bit version, release 3.20 or later, must be installed on each workstation where you will link to Time Matters 6.0 Professional Edition or Enterprise 6.0. PCLaw Data Link version 4.17 or later must be installed to see PCLaw Balances. PCLaw Data Link version 4.17 or later must be installed to see PCLaw Balances and PCLaw Totals on the Billing tab of a Time Matters Contact or Matter form. PCLaw must be installed and fully operational on each Workstation where you want to link to Time Matters.
<b>QuickBooks</b>	The real-time link requires QuickBooks 2002 or later, Pro, Premier, or Enterprise. QuickBooks Server (an optional part of the Time Matters application and offered at no additional charge) may be used for workstations without QuickBooks installed or by organizations requiring more than five users accessing the QuickBooks Company File.
<b>TM Save</b>	Microsoft Word 97, 2000, XP, 2003, Excel XP and 2003, PowerPoint XP and 2003, Adobe Acrobat 5.0/6.0, or WordPerfect 7, 8, 9, 10, 11, 12 required.
<b>Scanning</b>	Direct TWAIN scanning is supported, and requires a TWAIN compatible driver only - no additional software is required. Third-party software such as PaperPort is also supported.
<b>Tabs3</b>	To use the link with Tabs3 version 8 or earlier, you must purchase the Fixed Length ASCII Converter from STI. To use the enhanced Time Matters features for Tabs3 version 9 or later, you must purchase the Windows ASCII Converter from STI.
<b>TM Insider</b>	Microsoft Word 97, 2000, XP, 2003, Excel XP, PowerPoint XP, 2003, Adobe Acrobat 5.0/6.0, or Word-Perfect 7, 8, 9, 10, 11, or required.
<b>Timeslips</b>	Timeslips versions 6 (MR-7 and later), 7, 8, 9, 10, and 11. Timeslips version 9 or later is required to link Timeslips Custom Client fields to Time Matters and to view totals (as reported by Timeslips) on the Billing tab of a Time Matters Contact or Matter form. Timeslips must be installed and fully operational on each workstation where you want to link to Time Matters.
<b>WinFax PRO</b>	Time Matters Professional Edition 6.0 and Time Matters Enterprise 6.0 can send faxes via WinFax PRO version 9.0 or 10.0
<b>Word &amp; WordPerfect</b>	Word 6, 7, 97, 2000, XP, and 2003, and WordPerfect 5.0, 5.1, 6.0, 6.1, 7, 8, 9, 10, 11, or 12. The Time Matters Formattable Clipboard and merge templates are not compatible with any DOS version of WordPerfect.
<b>TM Connect</b>	Outlook 2000, XP, and 2003
<b>TM Open</b>	Excel XP and 2003, PowerPoint XP and 2003, Internet Explorer 5.0 or higher, and Adobe Acrobat Professional 5 and 6.
<b>Exchange Server Sync</b>	Exchange Server 2000 or greater
<b>Send To Excel</b>	Excel 2000 or greater.
<b>Send to Word</b>	Word 2000 or greater.
<b>WORLDDOX</b>	Requires WORLDDOX 8 (2000 Edition) or later, purchased separately. WORLDDOX must be installed and fully operational on each Workstation where you want to link to Time Matters.

## Implementation issues - can you install it yourself?

### Installing Time Matters Professional

Yes. Installing Time Matters is easy. The program is very useful right out of the box and most users do not hire consultants to do the installation. A new, empty Time Matters database, along with a separate Tutor Database populated with sample data, takes about five minutes to create.

As a part of a standard installation, Time Matters is ready to send information into Microsoft Word and Corel WordPerfect. It can print calendars, contacts lists, matter lists, invoices and other documents.



Ordinary users can learn the basics of customizing fields and other features in Time Matters without spending too much time. The product includes a large selection of narrated videos and a 582-page User Manual both as a printed book and an Adobe Acrobat PDF file.

But a word of caution: If you do not invest the time necessary to understand what you are doing when customizing software, you are likely to:

1. Miss out on many opportunities to save time and make more money; and
2. Make mistakes that may take an unfortunate amount of your time or a consultant's time to fix.

In most situations, law practices ranging from a solo practice to a very large firm will benefit from hiring a knowledgeable consultant if only to provide guidance and get the project off to a good start.

### **Installing Time Matters Enterprise**

In the right circumstances, you can install the Enterprise Version yourself. It comes bundled with Microsoft SQL Server 2000 Desktop Engine (MSDE), a free version of Microsoft's main database product. Following the step-by-step Installation Instructions, you can install Time Matters Enterprise and MSDE from the installation CD. Because of the requirements for the Enterprise version, the process can be more complex depending on the setup of the firm's existing network server. MSDE needs to be install on a Windows machine. If you have more than 10 users, you will need one of the versions of MS Windows Server on the network server and enough Client Access Licenses for all your users.

For more than 25 users on a Microsoft network, you need to have MS Windows Small Business Server or MS SQL Server installed. At this point it makes sense to have a relationship with a networking specialist or company for setup of the server software.

Time Matters Enterprise is also available for Linux. Expect to use the services of a person familiar with Linux to get up and running.

Support is available at reasonable rates from Time Matters for all versions of the program.

### **Importing Existing Information**

Bringing existing information into Time Matters is not technically "installation," but it is a crucial step for most offices. Converting data from and old system can require significant effort, not due to limitations in Time Matters, but rather due to the usually less-than-perfect condition of a firm's existing data. Often the information has been entered into the old system in different ways. People have saved information in odd places in the old program because of its limitations. These factors can complicate the conversion process.

Time Matters has pre-programmed import routines for 21 different software products including various versions of Amicus Attorney, Act, Goldmine, Outlook, PCLaw, Timeslips, QuickBooks, Juris and TABS. You can save a great deal of time and effort by importing your list of clients, matters and other information using one of these imports. In addition, Time Matters has a Custom Import feature for working with information that can be exported from other software products.

You can save time and get better results by hiring an experienced Time Matters consultant to assist you with importing information and customizing Time Matters to the needs of your particular practice. Sure, you can take the time to work through the manual and videos to master the tools for customizing the product. The vendor also offers live training classes and training over the Web. But if you do it yourself, you miss out on efficiencies that a consultant can bring to your practice based on years of experience in working with firms like yours.

### **How long does it take for people to get up to speed on it?**

In our experience, most people get over their initial resistance to changing to new computer software, including Time Matters, in less than two weeks. By the end of that time, with a few exceptions, the users are glad to have the new software and wonder how they ever got along without it. The results depend to a great extent on these critical factors:

1. Did the users spend at least 6 hours learning the basics of Time Matters?
2. When everyone started using Time Matters, did it contain all the essential information that was in the old system?
3. Was at least some customization done to address the firm's practice area or areas?
4. Was someone available to answer questions and make necessary changes while users were getting used to Time Matters?
5. Was everyone required to switch from the old system to the new system?

The best way to minimize the amount of time for people to get up to speed is to carefully prepare for the transition from the old ways of doing things to the new ones.

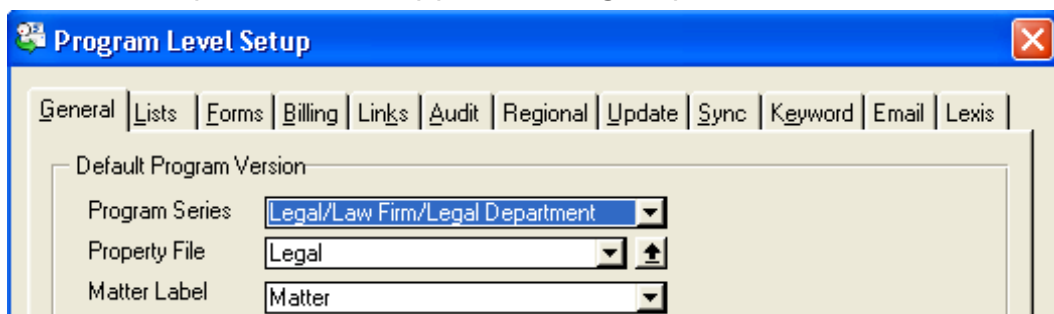
### **How customizable is the product?**

Time Matters is highly customizable without programming. Its power can be magnified through the use of both simple and complex techniques for adapting it to specialized uses.

**Property Files** – Time Matters lets you choose from among the 13 different practice areas listed above. (Click [here](#) to see the list.) When installing Time Matters, you choose the appropriate property file from the list.

**Feature Packages** – Some Time Matters consulting companies offer pre-packaged bundles of features tailored to the needs of particular legal specialties. These features can be imported into Time Matters, for example, to change fields, set up options, merge information into form documents, categorize contacts and matters, produce docket systems. See the Time Matters Store under Categories / Feature Packages for available products ([www.timematters.com/store](http://www.timematters.com/store)).

**Program Level and User Level Setup** - Time Matters allows you a wide range of choices that may be applied to the entire system or individually for specific users. Because different groups of users handle different kinds of work within Time Matters, it is important to set up button bars, lists, reports and other options that support each group of users.



Program Level Setup

**Lists and Quick Tabs** – Record lists in Time Matters can be reconfigured to show the information you need to see. Different lists may be designed for different purposes and users, showing only records that meet given criteria.

Contacts			
Filter		All Records	View Summary View
All	Clients	Courts	Experts Potential Vendors RSB
Last	First	Firm	Main
<input checked="" type="checkbox"/> Redmond	Carl	State of Florida	305-555-5257
<input type="checkbox"/> Reed	Leonard	Reed Electronics	305-555-9926
<input type="checkbox"/> Sanders	Gloria		919-555-6565
<input type="checkbox"/> Sawyer	Laurie		305-555-0792
<input type="checkbox"/> Shah	Rudy	Shah Unlimited	305-555-4541
<input type="checkbox"/> Sharp	Tommy	General Properties Development...	305-555-6333
<input type="checkbox"/> Shearer	Elizabeth	MegaTech Computers, Inc.	305-555-4548
<input type="checkbox"/> Shelby	Luke	Medical Case Management, Inc.	612-555-1289
<input type="checkbox"/> Sherman	Frederick	MegaTech Computers	305-555-4344

Quick Tabs on the Contact List

**Templates** – The appearance and content of different types of records – Contacts, Matters, Events, To-Do's, Documents, Emails, Notes, Phone Messages, Custom Forms and Websites – can be adapted for each practice area and for special purposes. Clipboard templates can be created for pasting information from Time Matters into documents and Emails. Merge templates can be designed to create documents and envelopes automatically. AutoEntry Forms may be designed to accelerate the partial completion of frequently created records, such as time entries and phone messages.

**Security** – A comprehensive set of security options can prohibit access to sensitive information based on a wide range of criteria. Security can be applied based on features, users, clients, matters, types of records, time of day and more.

**Coding and Color Coding** – Four-letter abbreviations with understandable labels are used throughout the program to classify information. You have complete control over the addition, modification and deletion of these codes. They may be used to color-code records by Staff or by type of record.

**Integration with Other Applications** – Time Matters includes links to a variety of industry-leading third-party applications, including MS Word, Corel WordPerfect, LexisNexis Research, MS Internet Explorer, MS Outlook, Palm OS, Pocket PC, HotDocs, WORLDOX, iManage, Tabs3, PCLaw, Timeslips, QuickBooks and Juris.

### **What kind of ongoing support do you need?**

The amount of support you need varies with who you are, but everyone benefits from devoting some uninterrupted learning time at the beginning. A variety of resources are available to facilitate learning and allow users to answer their own questions.

Time Matters is designed for users to install and learn the program themselves and that is what most users do. In order to achieve the efficiencies that are possible with Time Matters and reduce the amount of non-billable time getting started with it, users can take advantage of a network of Time Matters Authorized Independent Consultants (AICs). A directory of AICs is available on the Time Matters website ([www.timematters.com/consultants/](http://www.timematters.com/consultants/)). A number of these consultants work with firms throughout North America and the world using Internet remote control technology to share the user's screen, keyboard and mouse. By working remotely, AICs can work with attorneys and staff to configure Time Matters for their needs and to teach them the skills most important and relevant to them and their office.

Most software programs need to be updated. With Time Matters, you can apply an update to one computer on your network and all other computers will be updated rapidly as users open the program. The Time Matters Service

Releases are not just bug fixes; each one adds new features in response user requests and is available for download at no charge.

A variety of support resources for customizing and learning Time Matters are available:

- The HelpCam CD videos introduce users to the program and show how to customize it.
- Context sensitive Help is available throughout the program for basic information about various functions and quick answers.
- The User Manual, included both printed and PDF formats, serves as an extensive reference. It includes Frequently Asked Questions.
- On the Time Matters website, the Service Center has white papers covering selected topics in depth and a searchable, indexed Knowledge Base organized by topic and subtopic. ([www.timematters.com/support/servicecenter/](http://www.timematters.com/support/servicecenter/))
- The AIC Solutions Forum is a place for Time Matters, Billing Matters and World Server users and consultants to share knowledge about these applications, tailor these applications to individual needs, and develop specialized solutions. It is available to registered users via Email, Newsreader and the Web and is accessible from the [Service Center](#).
- New purchasers receive 10 free support incidents to be used within 90 day of purchase. Additional incidents may be purchased. The Time Matters support staff have earned a great reputation for quality and responsiveness.

### What are the 3 main weaknesses of the product?

1. Although some are available through the [Time Matters Store](#), a wider selection of **third-party guides and feature packages** targeted at particular practice areas and advanced features would allow users to gain greater efficiency from advanced Time Matters features without investing as much time. Excellent additions arrived after last year's ABA TECHSHOW from Out of the Box Developers and from Basha Systems. They are available through the Time Matters Store:

<http://www.timematters.com/store/category/?cid=102>

2. Last year we said Time Matters could benefit from **more attractive cosmetics** despite the makeover in Version 5. The new Version 6 came through with a complete redesign of the icons and new options for the style of tabs used throughout the program.



### Time Matters Backgrounds

Although all the standard Time Matters data entry screens are customizable, we would like to see the power of Power Views extended to data entry screens.

3. Time Matters – and practice management applications generally – suffer from an **image problem** among lawyers. Less than 50% of lawyers are regular users of practice management software. Other professions and businesses have fully embraced technology as a vital key to their success. Many lawyers still view computers and software almost as necessary evils. Though DATA.TXT, the maker of Time Matters, and other companies are trying hard, we would like to see even more effective communication about the differences that practice management software can make to the practice of law. Lawyers and staff are not the only beneficiaries of increased effectiveness and productivity; legal clients benefit from faster and more economical service.

### What are the 3 main strengths of the product?

#### Time Matters Advantage 1: Choice

Choice has become almost a mantra with Time Matters. The answer to the question, "Can it do this?" is almost always, "Yes. Which of these three or four or five different approaches works best for you?" Need to track more information? There are scores of customizable user fields on Contacts, Matters, and other records. A record layout looks too busy? Change the layout and hide unneeded fields. Want to access your information from another office, your laptop, Palm organizer, or any Internet-connected PC in the world? You can.

One firm may simply want to share a calendar to coordinate their appointments, a list of clients, and a list of matters with basic information about each one. They can get up and running very quickly and, for example, not touch the power of Time Matters to create and organize documents automatically. Another firm may decide to systemize the way they handle all communications to and from their clients, becoming more responsive and generating new business through the helpful information they supply. Both choices are equally workable with Time Matters. The Time Matters product line offers a broad range of choices.

#### Time Matters Advantage 2: Stability

Each new release of Time Matters goes through extensive testing in-house and throughout the network of Authorized Independent Consultants. Over the years the company has focused on quality under the hood. The Professional Edition comes with its own stable database technology that runs on all popular networks; the Enterprise Edition runs on industry standard Microsoft SQL server. Given the tremendous variety of available computer hardware and software and the occasional susceptibility of MS Windows, it is possible to experience a problem while using Time Matters. But it is extremely rare for the cause to be traced to an issue within the Time Matters program. When a problem does arise, it is extremely rare for any loss of data to occur. Time Matters sets high standards for quality, reliability and stability.

### **Time Matters Advantage 3: Community**

Because of its popularity and large market share, Time Matters users benefit from an extensive and varied community of people. The company actively solicits new ideas from users (Email yours to [ideas@timematters.com](mailto:ideas@timematters.com)) and incorporates them into new releases. As a result, all of the users benefit from the ideas of their peers. The same process occurs on active forums where questions and answers are posted. The AIC Support Forum, (available through the Time Matters [Service Center](#)), the [TechnoLawyer Community](#), and the Time Matters Elder-Law Listserver are constant sources of information about how to make better use of the program and how to adapt it to particular legal tasks and specialties.

An active network of consultants assists firms with planning, installation, data conversion, training and follow-up support. They produce learning materials and feature packages available through Time Matters and they volunteer answers regularly in the forums. Some have organized local user meetings with presentations and open discussions among Time Matters enthusiasts.

Knowledgeable users, consultants, and experts at DATA.TXT contribute to the resources in the Time Matters Service Center. It offers white papers and a Knowledge Base that cover narrow topics in depth.

Perhaps the best aspect of the community is the way that Time Matters people share and help each other. If you are new to Time Matters and have the opportunity to visit another firm that has the product, be prepared for an enthusiastic tour. If you call Tech Support, expect a call back within two hours from someone who really knows how to help you. If you ask a question in a forum, expect multiple answers without waiting long. The company has experienced increasing sales every year right through the technology recession, so expect the community to continue its strong growth, too.



## Amicus Attorney Summary

By Dave Bilinsky

A brief note for this part of the paper: I have *no* affiliation with Amicus Attorney or Gavel & Gown software – other than as a user and sometimes author of papers regarding their software (such as this paper, for which I receive no remuneration from Gavel & Gown or anyone else for that matter). I neither sell the product nor do I consult on the product. Accordingly, this part of the paper reflects *my opinions* on the product – I have included information from Amicus Attorney's web site only because this is the most efficient and effective way to gather and present this information.

With no further ado, here is a brief overview of different Q&A's regarding the product:

### What versions of the product are available?

Currently Amicus Attorney V+ has three versions (Organizer edition, for the single user, Advanced and Client-Server). As well, Amicus Attorney version X is now available. Amicus Attorney X is a web-based version of the product that is platform-independent (it will run on any computer running Internet Explorer) with advanced features (see summary on the new version just a little later in this paper).

A detailed feature comparison between the three V+ versions (Organizer, Advanced and Client-Server) and Version X is as follows:



Edition Matrix					
	Amicus Attorney V+			Amicus Attorney X	
	Organizer Edition	Advanced Edition	Client/Server Edition	Standard Edition	Premium Edition
# of users	1	1 - 15	1-100	2 - 15	2 - 2,000
Networking		File-share	Client/Server	Client/Server (not recommended for installation on a single computer or peer-to-peer network)	Client/Server (not recommended for installation on a single computer or peer-to-peer network)
Database	FairCom (Included)	FairCom (Included)	FairCom Client/Server (Included)	MSDE (Included)	MSDE (Included) or Microsoft SQL (licensed separately)
Workstation software	Thick client	Thick client	Thick client	Browser - IE	Browser - IE
Palm Synchronization		✓	✓	✓	✓
Outlook Synchronization			✓		✓

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PDA synch via Outlook			✓		✓
Security: Access Profiles & Record Restrictions			✓		✓
Custom Fields (per file type)	50	50	50	50	Unlimited
Custom Fields for Contact/ People	20	20	20	20	Unlimited
Custom Records					Unlimited
Custom Layouts				✓	✓
Shared Resources for scheduling		5	25	5	25
Notes module	✓	✓	✓	✓	✓
Search module				✓	✓
Team info on contacts			✓	✓	✓
ODBC Support			✓	✓	✓
Many to many relationships				✓	✓
Firm Directory				✓	✓
Addresses per contact	3	3	3	Unlimited	Unlimited
Time Zone Support				✓	✓
Document Management	Basic	Basic	Basic	Indexed	Indexed
Auto-updating				✓	✓
Getting Started Guide	✓	✓	✓	✓	✓
User Guide	electronic only	✓	✓	✓	✓
Administrator Guide				✓	✓
Free Warranty Period: 90 days after shipment, or 5 service incidents, whichever comes first. (3 incidents if only one user is licensed)	No warranty period. Technical Support contracts available.	✓	✓	✓	✓



## What does Amicus Attorney cost?

Amicus Attorney Software	1st License	Each Add'l License
<b>Amicus Attorney V+</b>		
Advanced Edition	\$399	\$299
Client/Server Edition	\$599	\$499
Organizer Edition - Shipped	\$219	N/A
Organizer Edition - Downloaded	\$199	N/A
<b>Amicus Attorney X</b>		
Standard Edition*	\$399	\$299
Premium Edition*	\$599	\$499
Add SQL to Premium Edition	\$100	\$100
*Minimum of 10 user licenses		
<b>Amicus Assembly</b>		
Amicus Assembly End User Edition**	N/A	\$199
Amicus Assembly Developer Edition	\$199	\$499
**First License of Amicus Assembly must be Developer Edition		

<b>Amicus Attorney Upgrades</b>	<b>1st License</b>	<b>Each Add'l License</b>
<b>From Amicus Attorney X</b>		
Standard Edition to Premium Edition	\$199	\$199
<b>From Amicus Attorney V or V+</b>		
Advanced Edition to Amicus X Standard Edition	\$199	\$149
Advanced Edition to Amicus X Premium Edition	\$349	\$299
Client/Server Edition to Amicus X Premium Edition	\$249	\$199
Advanced Edition to Amicus V Client/Server Edition	\$299	\$199
Update Advanced or Client/Server Edition V to V+	\$149	\$149
<b>From Amicus Attorney Version 4 or earlier</b>		
Advanced Edition to Amicus X Standard Edition	\$249	\$199
Advanced Edition to Amicus X Premium Edition	\$399	\$349
Client/Server Edition to Amicus X Premium Edition	\$299	\$249
Version 4 Advanced Edition to Amicus V Advanced Edition	\$199	\$149
Version 4 Advanced Edition to Amicus V Client/Server Edition	\$399	\$299
Version 4 Client/Server Edition to Amicus V Client/Server Edition	\$299	\$199
Any Version 3 or earlier to Amicus V Advanced Edition	\$249	\$179
Any Version 3 or earlier to Amicus V Client/Server Edition	\$429	\$329
**Please contact the Sales Department for information on upgrading from any Organizer Edition.		

## **New Developments:**

There is one big development with regard to Amicus Attorney. Amicus Attorney Version X has been released.

Here is an overview of what is new in Version X:

- (1) If your server is connected to the Internet, you can run from any machine that is connected to the Internet – anywhere, anytime. Nothing is installed on the local machine.
- (2) All existing functionality is preserved and in fact, enhanced.

- (3) Amicus Attorney is now built on Microsoft's SQL platform, building on this strong database foundation.
- (4) Now one phone call or appointment or email can be filed as being relevant to multiple files (such as when you talk to a client about all their files and not just one).
- (5) There is a new "Notes" module in Version X – that is free-form – allowing you to jot down something and then go back and convert it to a To Do, an appointment, a time entry etc...This will replace all the sticky notes that you have on your monitor!!!
- (6) You can design custom pages (unlimited in the Platinum edition) as well as having increasing customization with the addition of many new custom fields in existing parts of Amicus Attorney.
- (7) There are custom records in Amicus Attorney for information that you need collated (and totaled, if numbers are important, such as \$\$ spend on medical-legal reports).
- (8) Searching within Amicus Attorney has been enhanced.
- (9) Scheduling within the Calendar module has been enhanced – such as having Amicus Attorney automatically remind a client by email the day before an appointment.
- (10) Document management features have been enhanced by the addition of Microsoft's Indexing Service and the CommCenter now includes letters and faxes with your emails and telephone calls and messages.
- (11) The Contacts Module is now the People Module – and you can include all your staff as 'people' on the file with associated roles and responsibilities. You can attach a photograph to everyone in your People Module – allowing you to associate a face with a name.
- (12) The Time Tracking and Accounting Links have been enhanced - easing the creation of links with accounting systems using the new 'wizard' and the tracking of expenses on files.
- (13) Client collaboration features have been added that grant client select access to their files and information (but only such access as you choose). You can collaborate with a client on the drafting of a document, for example, via Amicus Attorney.
- (14) Support for Hot Docs version 6.

Check the Amicus Attorney web site for full details on this new version:

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




## What types of practice is the product suited to?

Amicus Attorney Organzier edition is well-suited to solo practitioners. The Advanced version is for firms with up to 15 users. The Client-Server edition is suitable for firms up to 500 users.

In terms of the types of practices that use Amicus Attorney, I have used Amicus Attorney in my practice as a PI lawyer and seen successful implementations in family law practices, in general litigation practices, in corporate and commercial firms – in other words, in many, many small to mid-size firms.

Amicus Attorney is most useful when it is paired with a legal accounting system. In my experience, this is particularly true where Amicus Attorney is paired with PCLaw as their accounting system, as I have seen that PCLaw and Amicus Attorney work well together. However, Amicus Attorney is designed to work with many accounting systems, in a dynamic mode, an enhanced mode or otherwise as follows:

### Dynamic Accounting Links

<b>PCLaw</b>	
	The Dynamic Accounting Link with <a href="#">PCLaw®</a> allows you to automatically share your Client/File and Matter information between the two programs, and allows you to post your Amicus Attorney Time Entries directly to your Matters in PCLaw. The links with PCLaw also features the Account Inquiry option to access accounting information from a particular Client or File in Amicus Attorney. <a href="#">Click here</a> for more information and a demonstration of the link.
<b>Timeslips</b>	
	The Dynamic Accounting Link with <a href="#">Timeslips®</a> also allows you to automatically share your Client and File information between the two programs, and allows you to post your Amicus Attorney Time Entries directly to your Clients in Timeslips. <a href="#">Click here</a> for more information and a demonstration of the link.
<b>QuickBooks</b>	
	The data sharing feature with <a href="#">QuickBooks®</a> 2002 products allow users to automatically share information between the two programs, minimizing the amount of data entry. Client/Files in Amicus Attorney exchange with Customer:Jobs in QuickBooks, Vendors are exchanged between the two, and Time Entries are posted directly to QuickBooks. <a href="#">Click here</a> to see a demonstration of the link.

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## Enhanced Accounting Links

### Juris



The integration with [Juris®](#) allows time entries to be passed to Juris and it allows both systems to share client and matter details. The link also features the Account Inquiry feature to display accounting information on a particular Amicus Attorney Client or File. [Click here](#) to learn more about the link with Juris.

### TABS III



The integration with [TABS III®](#) allows time entries to be passed to TABS III and it allows both systems to share client and matter details.

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## Other Accounting System Options

Along with the Dynamic and Enhanced Links, Amicus Attorney also works with the following accounting programs: Brief Accounting®, Cognito®, Dexco®, Elite®, ESI Law®, Laserform Legal Accounts®, LegalPRO/SoloPRO®, Lagalmaster®, Legal Vision®, Canterbury Lighthouse®, Manac®, Quicken®, Quill®, Solace Accounting®, Solace Millennium®, SOS Practice Manager®, and Verdict®.

If you don't see your accounting system in the list, you can still have it work with Amicus Attorney. If your accounting system has the ability to import, then you can create a template in Amicus Attorney that will allow you to post your time entries to your accounting system.

## Implementation issues - can you install it yourself?

In every case but one, I have installed Amicus Attorney myself (advanced, and client-server. In most of these cases, I have taken advantage of Amicus Attorney telephone and email support – why not? – it is free to you with every new purchase and upgrade. However, I believe that lawyer time should be spend on what lawyers do best – lawyering – and we should leave the technology and implementation issues to those who do this work best. The time that you invest in installing a software package – Amicus Attorney or any other system, can be better put to lawyering. Furthermore, if you were to run into a technical glitch (after all, computer hardware and software can be finicky) the time you spend can be many more times the cost if a knowledgably person was used. I happen to be fortunate – there is a certified Amicus Attorney consultant in my area who is rumoured to walk on water – at least that is what everyone says after they use her (you can find an Amicus Certified consultant in your area by going to:



<http://www.amicusattorney.com/consultants/index.asp>.) She also has her credentials with PCLaw, which may also explain why I have so many lawyers in my area who are happy with the combination of Amicus Attorney and PCLaw.

Accordingly, I recommend that you use an Amicus Attorney certified consultant to set up any third-party software links and any customization for you.

In terms of links with third-party applications, Amicus Attorney will work with the following products:

### Court Docketing



Automatically schedule your court dockets according to State and Federal court rules. By licensing [CompuLaw's](#) court engine for use with Amicus Attorney, you can schedule hundreds of related dates in just seconds. All the appropriate deadlines are instantly entered on your calendar and in your client's file. Order your copy of CompuLaw from Gavel & Gown.

### Handheld Organizers



HotSync your [Palm™](#) OS Organizer with a single button. Amicus Attorney provides a direct real-time bi-directional synchronization with Palm™ OS organizers. It transfers your calendar appointments and to-do's with Client File references as well as your complete contact list.

Client/Server Edition users can synchronize with other handheld devices through Microsoft® Outlook® by enabling Outlook Synchronization in Amicus Attorney.

### E-mail Integration



E-mail messages can be attached to your Files and Contacts, so the history of e-mail communications is at your fingertips when and where you need it. Save e-mails individually, or have Amicus Attorney do it for you automatically. E-mail can be sent, received and managed from the new *ComCenter* module. Amicus Attorney helps you follow up on your e-mails as well. Attach documents to files. Convert e-mails into To Dos. Get reminders in your Daily Report. And of course generate automatic time entries for your e-mail correspondence. Amicus Attorney's e-mail integration works with both [Microsoft® Outlook®](#) and [Novell® GroupWise®](#).

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## Scanned Documents



A convenient link with [PaperPort](#)® automates the process of attaching scanned documents to your Client Files in Amicus Attorney

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## Document Management



The popular [WORLDQX](#)® document management system integrates with Amicus Attorney.

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## Medical Record Retrieval



Online integration with [RapidRetrieve](#)™ by MediConnect.net™ allows for easy online medical record retrieval. [Click here](#) to learn more about the integration.

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## Writs of Execution and Property Searches

Online integration with [BAR-eX](#)™ Search services for users in Ontario Canada



- BAR-eX Property Search using POLARIS™
- WritSearch™ by name or by number
- OWL™ (Ontario Writs Locator)

[Click here](#) to learn more about the integration.

## How long does it take for people to get up to speed on it?

Amicus Attorney's graphical interface and ease of use results in a very flat learning curve. A few hours is all that it would take to grasp the core functionality of Amicus Attorney – that being the Calendar, the Time Sheet, the CommCenter and and the File modules. Customization work – such as implementing your letterhead format for merge features with Amicus Attorney and your Word Processor will take some understanding of how the program works – I would not recommend jumping into this until you have worked with Amicus a little while. However, this is not difficult – I am just not recommending that you try to do everything at once. After all, it is easier to swallow an elephant if you do it a little bit at a time.

## How customizable is the product?

I have tried to outline how you can customize the program through the Office module – by going into Setup and into Preferences. You can set up Amicus to track custom fields in the file opening process. You can set up linked events – for example to generate reminders for a upcoming trial – that will generate all reminders for the production of expert reports, for reminding your client to bring in a retainer prior to trial etc - that can be designated a precedent and reused over and over again on different files. However, to be fair, I have done little customization – finding that the program suits my needs without much ‘tweaking’- and that is after using it for 8+ years! Others may find that they want to highly customize the program, and in this respect, I acknowledge that Time Matters has the edge over AA version V. But version X of Amicus Attorney is *very customizable* – and it maintains Amicus Attorney’s famous ease of use. You may in fact find that you can get your cake and eat it too...

Wells has mentioned TM’s Feature Packages – Amicus has an equivalent called Practice Packs.

In fact, if you are interested in how to customize Amicus Attorney in your particular instance (and I recognize the inherent difficulty in writing a generic paragraph on how to customize a program for a particular user), I recommend that you call Amicus Attorney directly and speak to them. I have found that they are more than willing to discuss their product and whether the product is suitable for use in a particular instance – after all, they don’t want unsatisfied purchasers out there.

## What kind of ongoing support do you need?

Amicus Attorney comes with a free support period (90 days or 5 incidents after shipping, 3 with the organizer edition) and you can elect to take out an Annual Service Plan. I have such a plan and find that it is invaluable. I have found that I have needed support – usually 1-2 times/year, either to assist in migrating the system between computers or when the product undergoes an upgrade, or unfortunately when the database gets corrupted (usually due to an premature shutdown of the Windows operating system for reasons not attributable to Amicus Attorney – hopefully with Windows XP being more stable than prior Windows versions, this will not occur at all..).

When Windows did crash taking my database with it, Amicus Support took in my database by FTP, fixed it and FTP’d it back to me so that I was back up and operating with as little down time as possible. I have found that Amicus

Attorney's Support has always been very helpful and sympathetic – a nice touch when you really need it – but no matter how fast the turnaround time is, it is always too long when you are waiting for a problem to be solved...

### What are the 3 main weaknesses of the product?

While Amicus Attorney links dynamically with many accounting systems such as PCLaw, Timeslips or Quickbooks, in a perfect world, I would like to see Amicus Attorney have a fully integrated Accounting Module providing general and trust accounting functions all within one database.

Secondly, I would like to see the ability to resize the screens and dialogue boxes within Amicus.

Thirdly, I always want systems to be more integrated than they are – and this applies to Amicus Attorney as much as to all other software. I would want the links with other products to be as simple and straightforward as possible.

### What are the 3 main strengths of the product?

Undoubtedly, the first and foremost major strength of Amicus Attorney is its **Ease of Use**. The program has been designed by a lawyer to work the way that lawyers need a practice management program to work. The modules and screens have been designed to be instantly understandable to lawyers. The program mirrors how lawyers work – starting from the Files orientation of the program, and continuing through the Calendar, the Time Sheet and the CommCenter. Each of these has been given careful thought to ensure that they work 'as they ought to'. And they work seamlessly together as an integrated whole.

The second major strength would be **Workflow** - how Amicus Attorney allows you to be efficient and effective by taking a telephone call message and converting that to a telephone call record – and converting that to a To Do – and converting that to a Calendar Appointment and converting that to a Billable time entry that is in turn, sent to your accounting system. This integration ability that saves keystrokes and allows you to keep progressing with a file by working with the product is a major advantage over paper systems or indeed, over systems such as Outlook. This workflow ability has allowed me to take my practice virtually paperless – since I work with emails and electronic documents rather than generate paper. All this electronic information is stored within Amicus Attorney or linked to it (such as the Outlook email integration)– allowing me to use Amicus Attorney as the center of my practice.

A third major strength is that Amicus Attorney's **Systems Approach**. Amicus Attorney maintains all of the systems (conflict checking, bring forwards, ticklers and the like) that lawyers need to practice ethically and competently - right to their desktop. There is no need to maintain separate time wasting paper systems.

## Selecting and Implementing Practice Management Software

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The best way to see the features of the practice management products is to take an on-line demo or download trial versions. See the Amicus demo at [www.amicusattorney.com](http://www.amicusattorney.com). On the Time Matters Website there are dozens of multimedia files that demonstrate its features. ([www.timematters.com/](http://www.timematters.com/))

Other popular practice management products include:

- Prolaw or Prolaw Ready (for smaller firms) ([www.prolaw.com/](http://www.prolaw.com/))
- PracticeMaster ([www.practicemaster.com/](http://www.practicemaster.com/)) from the makers of Tabs3
- Client Profiles ([www.clientprofiles.com](http://www.clientprofiles.com)) an integrated legal accounting and practice management system.
- Computer Law Systems, Inc. ([www.clssummit.com](http://www.clssummit.com))
- Corprasoft ([www.corprasoft.com](http://www.corprasoft.com)) – Corporate Law Departments
- LawStream ([www.lawstream.com](http://www.lawstream.com)) – an integrated legal accounting and practice management system.
- LAWTRAC ([www.lawtrac.com](http://www.lawtrac.com)) – Corporate Law Departments
- Legal Easy, Inc. Attorney's Assistant ([www.legaleasy.com](http://www.legaleasy.com)) – Family Law Office Suite
- Legal Files ([www.legalfiles.com/](http://www.legalfiles.com/))
- Lextranet ([www.lextranet.com](http://www.lextranet.com)) – Web-based litigation support and case management
- Needles ([www.needleslaw.com](http://www.needleslaw.com))
- PCLaw ([www.pclaw.com](http://www.pclaw.com)) – this is a legal accounting system that has added practice management features in their latest version 7.
- Perfect Law ([www.perfectlaw.com](http://www.perfectlaw.com))
- RealLegal Practice Manager ([www.reallegal.com](http://www.reallegal.com))

Ideally, you should also spend some time with a legal technology consultant who can demonstrate the features of the software you are looking at, and who can listen to your questions and provide one-on-one answers and feedback. Talk to existing users of the products you are considering, and

ideally look for attorneys in the same area of law. The services of a good legal technology consultant can also help you sort out which product is best for you. Law Office Computing Magazine ([www.lawofficecomputing.com](http://www.lawofficecomputing.com)) is an excellent source of information, as are the TechnoLawyer ([www.technolawyer.com](http://www.technolawyer.com)) and ABA LawTech ([www.abanet.org](http://www.abanet.org)) Email lists.

When you are reviewing different products, make sure you consider whether they are flexible enough to work the way you do. Can they be customized? Do like the standard billing format and/or can accounts be customized. How do they integrate with your existing software and what data sharing or importing will be required (this can be time consuming and expensive)? Ultimately, it should be about the product helping your practice, not about making your practice adapt to fit the product. Although, in some cases, you will have to change or adapt the way in which you do certain tasks or processes. This may include how you handle information, who enters it in the computer, how file materials are collected and stored etc. This will require some thought on your part, and the input, participation and co-operation of your staff. It is critical to get their input and have them participate in the selection and implementation process.

The basic cost of practice management software products varies from a several hundred to a few thousand dollars per user. Stand-alone versions tend to be at the lower end of this range, versions that allow seamless 24-7 access over the Web tend to be at the upper end of this range. However, the actual cost of the software will be a small part of your overall costs, which will include implementation and training costs. To implement it, you will likely need to hire the product vendor or a consultant, especially if you have to convert data from an older system. All practice management products are complex. Everyone in your office will require training. Training is essential - if you don't properly train your lawyers and staff, they won't use the product to its full advantage.

## Summary

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Technology has become an essential part of what is reasonably necessary to practice law in a competent manner. Ideally, practice management software should be in place as the central nervous system in every law office or legal department. The ability of these products to share and manage the critical information that lawyers and law office staff need is nothing short of amazing. They can make an individual practice, and indeed an entire firm, far more efficient and profitable, with the added benefit that they can help implement basic practice management processes that can help prevent the common types of errors that lead to errors or malpractice claims. While Outlook can assist lawyers in managing much of the information they need, and many of the tasks that must be completed, it is not a true substitute for one of the law-office specific case management products.

The level of integration that many of the law office specific case management products have with other law office specific products, be it timekeeping and billing, document management, issue management and document assembly, along with their being tailored to how a lawyer works and the systems that need to be kept and the tasks that must be done, simply makes them unbeatable. These practice management tools can become the 'central nervous system' for your practice – they can save time, they can save money and they can save worry – by ensuring that all the different systems of your practice are being maintained in a manner that allows you to carry on the practice of law in conjunction with the application and supported by it.

Ultimately, despite the leapfrogging that takes place between Amicus Attorney and Time Matters in terms of "Who is Rated #1 or #2", (Time Matter was ranked #1 and Amicus Attorney #2 by a Law Office Computing survey released in 2003, while Legal Assistant Today reversed these rankings in their survey released in 2003), the best tool is ultimately the one that is actually used. Accordingly, you are the final arbiter: Look at the functionality that *is most important to you* and see which application meets those needs best *in terms of how you work*. Then implement it – and join the thousands of lawyers who now say that when it comes to Practice Management Software, they simply could not imagine practising without it.

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