Keep On Tracking….
Office Tracker Software Review
By
Jeffrey Allen

All attorneys have calendaring needs and requirements. Those requirements vary from office to office, ranging from simple to highly complex. No matter what the size of our office or the complexity of our calendar needs, we all want pretty much the same bottom line: software that works easily and reliably and records the required information in a readily accessible manner. Generally, larger offices have more complicated calendaring problems. Keeping track of one lawyer's schedule can be difficult enough. Think about trying to keep track of 50 or 100 attorneys' calendars at the same time. In addition to the problem of identifying a time when several attorneys can attend a meeting, larger firms also may have issues relating to the use of popular resources such as conference rooms, projectors, etc.

Milum's Office Tracker program (www.milum.com) allows users to have a separate calendar for each person in the firm; it allows the sharing of calendars and, it allows all calendars to be concurrently searched for available times for a meeting. By setting up a resource, such as a conference room, as a user and scheduling its use, you can also track and verify its availability for any required purpose at any given time. The literature supporting the program says it will handle more than 1000 individuals and resources.

Some firms with litigation practices may also want a program with rules-based calendaring (calendaring programs that automatically calculate and set due dates for compliance with applicable court rules respecting the pending litigation matter.

Office Tracker does not provide this facility. It was not designed exclusively for use in a law office. It does not provide a rules-based structure. If you need a rules-based calendaring system, you should keep on looking.

Office Tracker consists of a two separately installed pieces. The first piece, a server, is the heart of the system. This installation functions as the master database file, storing information input by all connected users and accessible

by all connected users. You can use a dedicated server if you wish, but the program does not require it. If you will only run it on a single computer, you run the server installer on that computer and it sets up a server on the computer and then you use it as though it were a stand-alone. The program, however, was designed to work on a network and works most efficiently in a network environment as that allows each user to have access to their calendaring information and also allows the search of information respecting other calendars for the purposes of setting a meeting date. You can use most desktop or laptop computers as a server.

The program opens in and operates through your web browser. Although that may give you the impression that the data is stored off of your premises, it is not. The data remains under your control and in your Office Tracker Server. The good news there is that it remains secure; the bad news is that you better remember to back it up, as there is no included remote back up.

Installation.   Installation of the server piece proved simple and straightforward. Select the installation file, open it and wait for the wizard to finish.
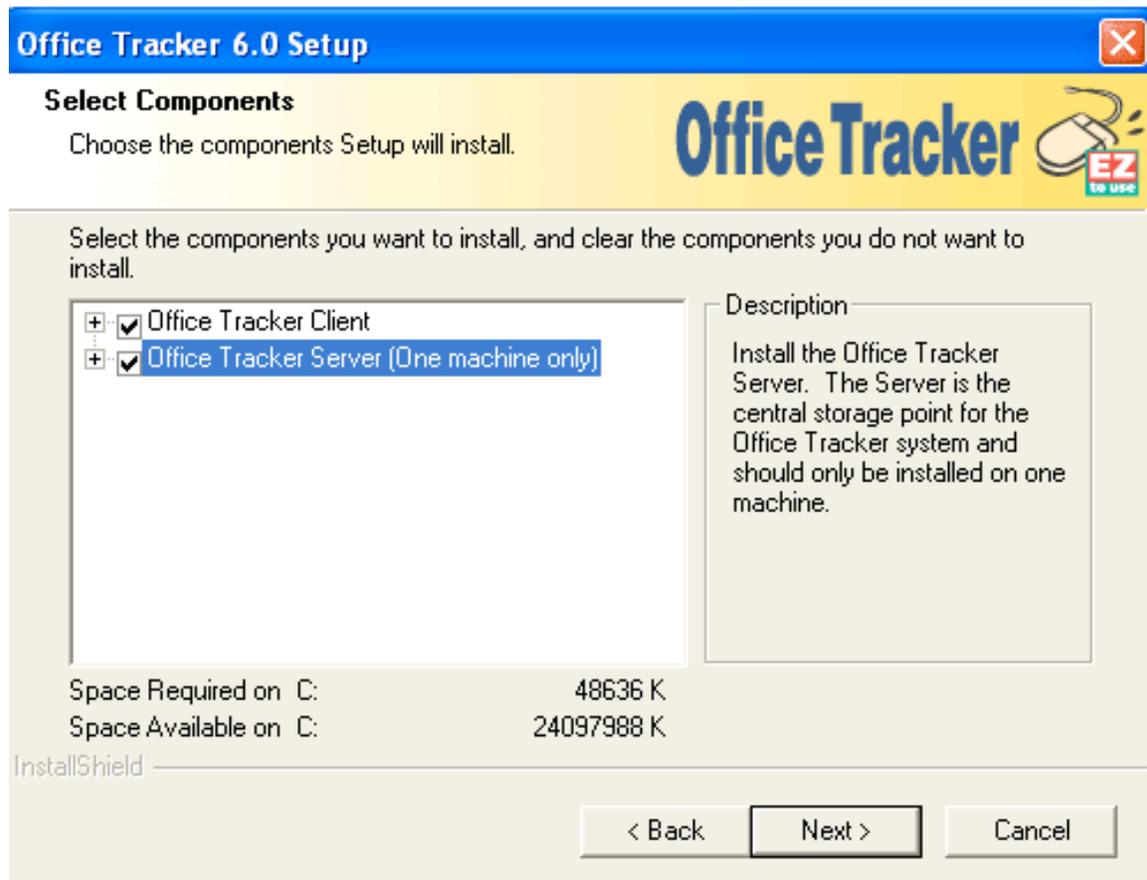
The second piece, the "client" connects to the server and allows individual users to enter data and view the collective information stored on the server. Installation of the client file proved no more difficult than the server file. It is almost completely automated. As the installation completes, it looks for the server. When it locates what it believes to the server, you have to confirm. Then the installation finishes.

Office Tracker runs on Windows 98, NT, 2000, Windows XP, and via the optional web based calendar it can be used on other platforms such as Macintosh or Unix. You can also use your schedules on your Palm OS PDA.

The Server. The server is the repository of all the firm's calendar data, without regard to which connected client enters it. You install the Office Tracker Server on one (and only one) machine on your network. The server can be either a dedicated server-based machine or a desktop machine. The machine you choose depends on the size of your workgroup and your particular needs. It is best if you can choose a server machine that runs Windows NT, 2000 or XP as these are operating systems more geared for server use.

After installing the server, you access the "Admin" pages in your web browser (such as Internet Explorer). In the server, you create a list of all the names you will be scheduling such as the people in your office, rooms, facilities and other resources such as equipment or vehicles. Once you add your names to the list, you will be ready to "connect" using the installed Office Tracker client software. Through the use of the client software, you can create individual and group schedules with any of the names on the Names List. .

The Client. Scheduling and data entry occur through the Office Tracker "client" software. You install the client software on each machine that you want to share in the scheduling process. When installed, users will see the Office Tracker client application shortcut on their computer desktop. After installing the Office Tracker client software, you "connect" to the server by pressing the "Connect to Server" button. You will enter the Office Tracker Server's IP address or Machine Name (which you can find on the Server's Admin page).

Client users have the choice of viewing schedules in many formats including the popular side-by-side daily view. I found the options reasonable, readable

and easily understandable. A few examples follow:

Operation. The program is intuitive and easy to learn. The interface should look familiar to anyone who has used a calendaring program. The screens for input and calendar display are easily understood and readable. I had no problems with the actual operation of the program. Office Tracker did what it was supposed to do; and it did it well. While it can work as a calendar program for one attorney, it's design makes it better suited for groups rather than sole practitioners. In fact, the larger the firm, the better it is in terms of functionality.

When setting up a meeting involving two or more of the people or resources you are tracking with the program, you add them to the meeting. When you add them the program checks for schedule conflicts and reports any to you so that you can adjust.
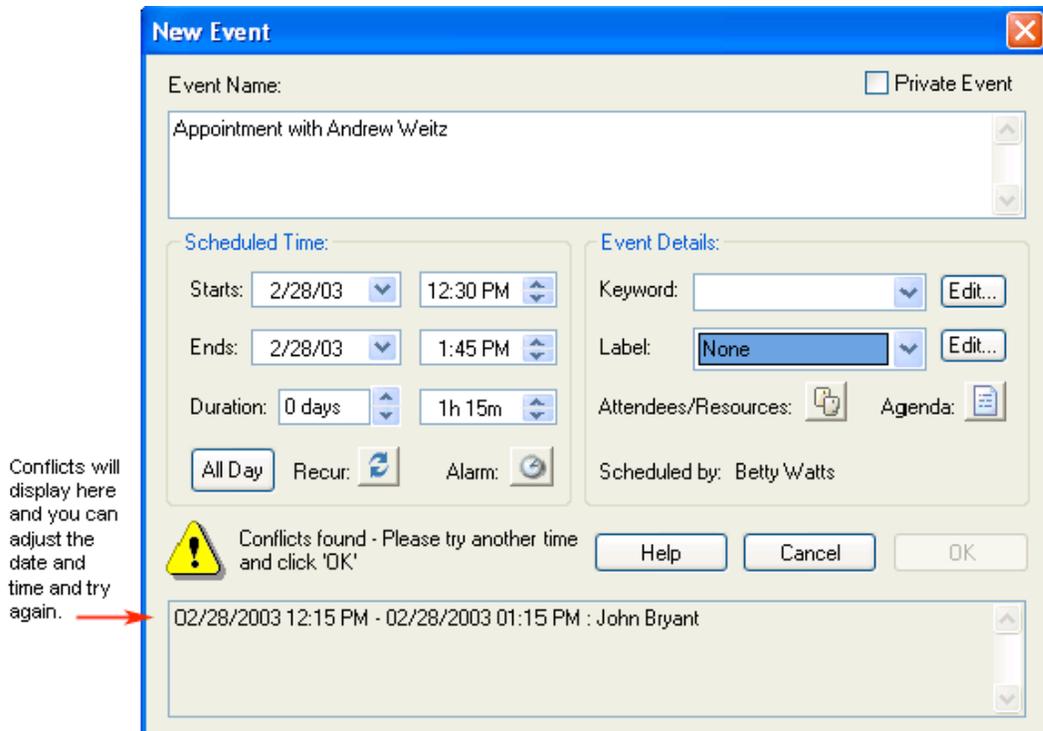
Most contemporary calendaring programs allow you to add notes to the event entries. Some provide better usability than others. Office Tracker's system allows a sufficiently well sized entry that you can create a meeting agenda and attach it to the meeting entry on the calendar.

Office Tracker also has a contact manager that allows you to keep track of your contacts and to connect them to meetings when appropriate.
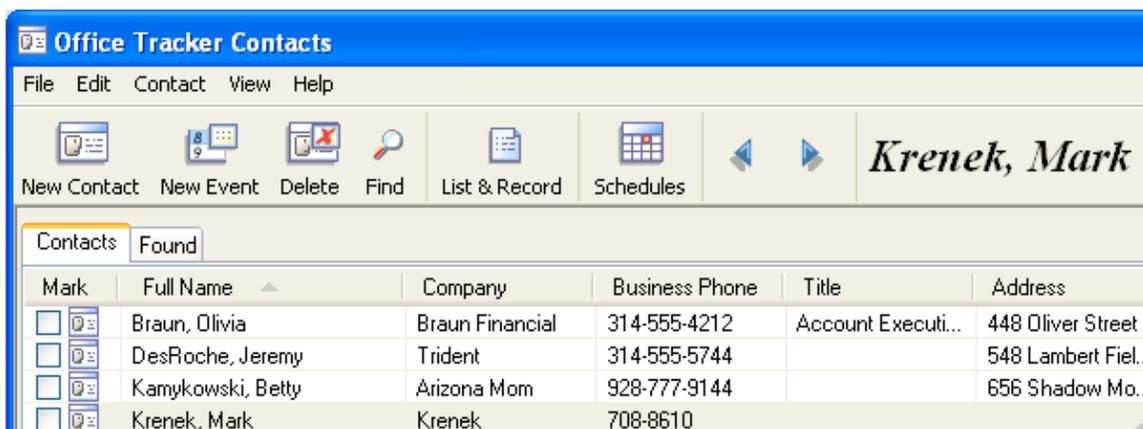
Cost. As if to emphasize the point that the program works best with larger numbers, the company sells the program with substantial discounts for larger numbers of users. A single user version of the program lets one user keep

track of and have access to everyone's calendars. It costs $495. A five-user version (allows five users to share schedules of unlimited individuals and resources) costs $995. A ten-user version costs $1295; a twenty-user version costs $1995; a twenty-five-user version costs $2395; a thirty-user version costs $2895; a 40-user version costs $3795; and a fifty-user pack costs $4495. For over fifty you can call and get special pricing. Support costs $395 per year.

Optional Ad-Ons. Milum has developed optional add-on software that it sells separately. Options include a Palm conduit and a web viewer. Both come at an additional cost for purchases of less than twenty-users and free with twenty or more user packages. The Web Viewer allows an unlimited number of people to view schedules over the Internet without being "users" of the program.

The Manual. Wait for the movie! If you look through it carefully, you can generally find what you need; but it could and should have been written better.

The Verdict. If you have a large organization and the need to identify times available for meetings involving two or more of your scheduled personnel, Office Tracker is an excellent choice in terms of performance and a reasonable value. A sole practitioner or small firm will likely find the program too pricey and overkill. Whatever size your firm, if you need to have rules-based calendaring, however, look elsewhere.