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From the Oct. 2008 Review of
Practice Management Systems

CaseWare Time/Today, a practice management application from CaseWare, provides intuitive time and billing processes, organized document management, and performance
management for small and mid-sized firms. This product has many features to support an international client base, as well.

Ease of Use/Flexibility – 5 Stars
The developers for CaseWare Time/Today have made a strong, user-friendly package. Installation requires little effort, and the setup screens do an excellent job of guiding the user through the setup tabs, defining required entries and providing multiple input methods. Many of the fields for clients, addresses, the firm and employees can be customized or renamed to clarify differences in terminology, and optional and user-defined fields are available, as well. Definitions to terms and fields are made clear in the interface to reduce frustration in the field-mapping process. Knowing the intent of fields, their dependencies, and their requirements is a great benefit to correctly setting up a new practice management system the first time.

Get Special Insight into CaseWare International:
Listen to Executive Editor Greg LaFollette as he and Lynda Ward, CaseWare Time product manager, discuss practice management, best practices and some of CaseWare Time's features (both new and

planned) –

rather than a SQL database instance.

Productivity Tools/Features – 5 Stars
Time/Today is oriented around firms with engagements or projects and has features for firms with multiple departments. Employees can be assigned to units, projects can have sub-projects, and numerous work and task codes can be set up. Specific to employees, up to 20 work codes with unique billing rates can be entered. Rule-based overtime tracking and billing is an option, and basic employee time budgeting is built in.

The interface is highly intuitive, with quick access to customizable filters for the current user profile. Filters can be created for documents, clients, staff, projects and dates that will be viewed in reports. A workflow guide is provided, which can ease the billing and month-end processes for a firm. Reports are available within the document manager. Report templates are available for immediate use or firms can generate new ones. From within the application, the document manager can be used to create new Word and Excel documents as well as new CaseView documents. This can be beneficial to firm administration for the generation and tracking of client notices, letters and planning information.

Setting up the application for a firm will require the collection of information from the previous practice management/time & billing application. Useful to have are well-understood (documented) practices. Several methods are available for importing opening balances. More importantly, diagnostic reports show what's missing from the critical setup components (employees, company profile, etc.).

Multiple billing types from WIP are supported, with guides and explanations to each type. A review process can be utilized for tracking invoices before sending to clients. Scheduled and proposed billing is supported, as are non-WIP based invoices (called Miscellaneous Invoices). Timers can be set for phone calls or meetings to automatically record billable time. Time entry is self

The document manager handles reporting. Provided initially are reports for Partners that give summaries of firm performance in time, WIP, expense and billing. Specific reports are offered for accounting, projects, analysis, budgets and month-end. Also a nice touch are the provided sample letter documents, client labels and staff labels. This may save your administrative staff some time for mail-outs. CaseView documents can be customized based on fields provided. Print options are built into some documents. To support paperless office initiatives, Time can be used to export documents to PDF. Batch e-mails to clients are supported, allowing for multiple documents to be selected, filtered, exported and sent to multiple clients. Settings for batches can be saved for future or recurring use.

Support/Help/Updates – 4.5 Stars
Through a network of representatives, CaseWare extends support globally. Support remains strong, with continued efforts to accommodate user requests in its most current product release. Extensive documentation in print is available, in addition to Help files and online support. Registered website users have access to software update downloads and e-mail services. Online and classroom instruction for the vendor's products are available, though no training sessions for Time or Today were scheduled at the time of this review. Updates are released annually.

Integration – 5 Stars
The Today component is installed as an add-in to Microsoft Outlook. While it added a nice dashboard feature in Outlook 2003, the interface did not change to match new tools for Office 2007 or the new layout for Outlook. If your firm requires fast access to reports and is heavily dependent on Outlook, this is a worthwhile module to investigate. Support for synchronization is at the user's choice of contact, time and appointment migration from Outlook into the Time application, or from Time into Outlook. Support is offered for exporting data

to CaseWare IDEA for detailed data analysis and reporting. CaseView for Time

handling. Licenses renew annually for half of the current license price and include technical support and updates.

2008 Overall Rating: 4.5 Stars