

## Techniques for Effectively Evaluating Matter Management Customization Features

By Penny J. Simpson

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As part of selecting a Matter Management system, you should understand in detail the key functions to evaluate so that you can make an informed decision that is not fraught with future hidden costs. One such function is the ability of the user – you and your law department – to customize the system. To provide a level of detail that will be helpful in your evaluation, this article focuses solely on some of the considerations you should bear in mind when evaluating your ability to customize today's Matter Management products. This does not mean modifying the underlying program and its code; it means making changes in the screens and reports of the program.

In the last five years, developers of Matter Management systems have made great strides in end-user customization. No longer are law departments required to purchase costly programming time from vendors if some change in the business creates a need for modifying the program. All of the major products – there being nearly a dozen packages designed for law departments – have some level of end user customization available. The trick, however, is to ask the right questions and understand, before licensing the system, the extent to which it allows customization, how simple it makes customization and, more importantly, how much it even requires customization.

First, and generally, make sure your evaluation includes all screens. Just because you can make sweeping changes to the matter screen do not assume that the same capability will extend to the matter related screens such as time tracking, calendar/events and financial screens.

Second, determine the capabilities of each Matter Management system you are evaluating with regard to modifying fields. Can you only change the name of a field on a screen or can you change the

field type as well? As to the name itself, if you make a change to the field name, what is the maximum length of characters allowable? If you can only change the name of the field, you may find out later that the field you needed in that location was a dollar field instead of a text field.

Can you remove a field from the screen or is the field just masked? Some programs allow you to mask or turn off the field so that it does not appear on the screen. This limits you, because that portion of the screen cannot be used for another field. More powerful are the Matter Management programs that allow the user to remove a field and rearrange the remaining fields.

As to field types, they include text, numbers, dates, lookups, multi-selects and others. On each of the major screens you need to find out what field types can be added or modified. In some programs this varies greatly from screen to screen. Optimally, you should be able to add all types including text (usually limited to 250 alphanumeric characters), number, lookup fields, multi-level lookups (e.g., selection of an item takes you to another list of sub-items), dollar, and memo (long text) fields.

Find out if the memo (long text) fields can be searched. Some previous technologies have made this a difficulty and in some instances require the purchase of additional tools. Remember once again to ask this question of memo and long text fields on all screens.

Third, when adding new fields or modifying fields, find out the effect on reporting. When the end-user changes a field name as it appears on the screen, is this change also proliferated on lists of fields used in searching and reporting? If it is not, you will find that it is quite difficult for the end user to make the leap from "user defined date field number 1" to "date received".

Fourth, a careful evaluation must consider the end user's ability to make use of so-called user-defined screens. It was a happy day in Matter Management technology when the products began offering the ability to attach user-defined screens. This is extremely helpful if user-defined screens are linked to existing standard screens and, where appropriate, specific matter types. An example would be if your company is involved in environmental matters and needs to track Superfund sites. For most "environmental matters" users would just fill out the basic environmental screen, but on Superfund matters they would complete an additional user-defined screen that would include site or RFI information.

Finally, another often overlooked area is the link of specific fields on a screen to other aspects of the program, such as searching and reporting. Find out for each screen if a change is made to a field, what impact it may have on standard reports, or automated updating in the rule-based or financial areas of the program. You may assume that you can modify a field for one purpose and then find out later that the change has limited the functionality in another text area of the program.

These days, when law departments license a Matter Management system, they usually obtain a full array of changes that they can make in the program, so that it better meets their needs. We have seen, however, that the ability to customize the program – from the standpoint of the end user – is rife with subtle tricks and concerns. Avoiding these pitfalls will lead to a better product selection, more return for the investment, and a better managed law department.

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