



# Putting PIMs to Work

by Craig Savage

In the field, information management tools are where you find them — a pencil and a scrap of drywall usually get the job done. But if you make your money at a desk, electronic information managers begin to make sense.

Today, a variety of electronic Personal Information Managers — or PIMs — are available for computerized contractors. The simplest PIMs are on-screen “rolodexes” that let you store and retrieve phone numbers and addresses with a few mouse clicks or keystrokes. By adding room to take notes, PIMs improve on the rolodex, giving you a historical “audit trail” of past conversations for each name in the database.

More sophisticated PIMs add some form of calendar or daily planner, and a to-do list. High-octane varieties also include free-form databases, group scheduling, alarms, time billing, E-mail, letter writing, address labeling, and contact management.

## Do You Need a PIM?

All of this stuff sounds great, and in fact, construction managers need to do most of the things PIMs do. But whether or not you should use a PIM depends on how your workday is organized.

For me, the state of the art is still a legal pad. Why? Because it is fast, handy, and cheap. And it only involves a single step — write down the task and check it off when finished (okay, two steps). I tried a laptop computer, thinking it would let me use a PIM wherever I was. But my lap disappears whenever I stand up, and so does my ability to type. If you work in the field, forego PIMs for now. (Personal Digital Assistants — PDAs — like Apple’s *Newton* and Sharp’s *MessagePad*, may make pen-based, on-site computing feasible in the near future, but not yet.)

But PIMs have some appealing features if you do most of your work at a desk. For example, automatic phone dialing — including storing and retrieving phone numbers — can save you real

time. Another handy function of some PIMs is the ability to paste addresses into letters and faxes. To-do lists are also useful, especially when tied to a calendar.

All of the other PIM features are window dressing to these main functions. Alarms that beep and display pop-up messages at predetermined times are useful only if you have a lot of meetings and are near your computer most of the day. Similarly, a full-blown contact manager with calling history and form letters will be worthwhile only if you make lots of sales calls.

Lately, my own business life takes place between a job shack and two offices. I stay organized using a Mac Powerbook and three additional tools. You’ve already met the legal pad. The second tool I use is a flat file contacts database I created in Microsoft Works. I like the Works database because it merges addresses with custom forms, and especially, because it searches on any — and I stress any — word I can remember. Even if I can only remember three letters in the middle of a client’s name, I can find it by searching for those three letters. Few contact databases can make that claim, which is why I’ve stayed so long with Works.

## In Control

The third tool I use is *In Control*, a to-do list manager with a built-in calendar that’s as close as I’ve come so far to a PIM. The program is based on a hierarchical outlining concept that is perfect for project managers whose to-do lists fluctuate daily between hundreds of items before noon and almost none at quitting time.

Outlining is a powerful way to attack the problem of a prioritized task list. In my own case, I set up three major divisions — construction, writing, and personal — to reflect the

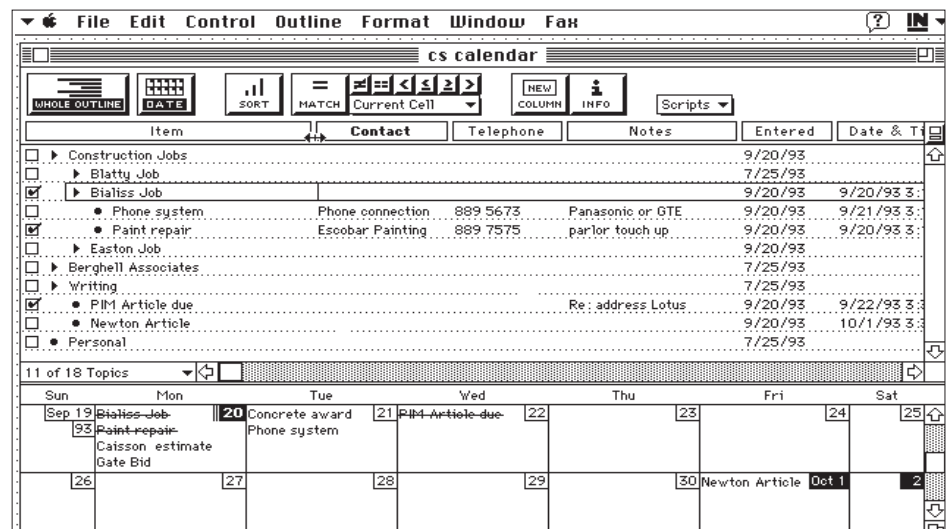


**In Control** (\$89.95) requires Macplus or higher on any current Mac, System 7.0 or higher (also works with System 6.0.5 or higher), and a minimum 600k of memory. For more information, contact Attain Corp.

(50 Grove St., Somerville, MA 02144; 800/925-5615).

different activities I routinely perform, then outline to-do items for each one. Under “construction,” for example, I list the jobs I have under way, and within each job I list the individual to-do items for that job.

*In Control* also lets you set up custom fields to fit your needs. I created the fields Item, Contact, Telephone, Notes, Entered, Date & Time, and Priority (Figure 1). You can add fields as you need them, sort on any field, and collapse any part or all of the outline.



**Figure 1.** The outline format of *In Control* makes it easy to arrange and prioritize a to-do list. With the calendar view toggled on (bottom of screen), you can move items by dragging them with the mouse and dropping them into a new date box.

The calendar view, which you can toggle on and off, lets you see the big picture at a glance. It also makes it easy to move information around. All it takes to change the placement of a task is to drag and drop the text into the calendar box representing the new day and time.

## Lotus Organizer

This system works well for me, but PIMs are changing and so are my work habits. The most recent crop of PIMs has made me rethink the computer tools I use. I'm convinced that it won't be long before I switch to a single package that provides all of the functions I've just described.

One candidate is made by Lotus, and is one of the most popular Windows PIMs. Called *Lotus Organizer*, the program is set up like a paper notebook. The compliment of functions include an appointment calendar, to-do list, address book, yearly planner, notepad, and a tickler file for remembering recurring dates like birthdays, maintenance schedules, and so on.

To record appointments and to-do items in the notebook, click the mouse on the day and time of the appointment and type in the data (Figure 2). You can reschedule appointments by dragging and dropping the text into a new time or date slot. You can also set built-in alarms to remind you when tasks are due, and to run an application, like a word processor or spreadsheet, at appointed times.

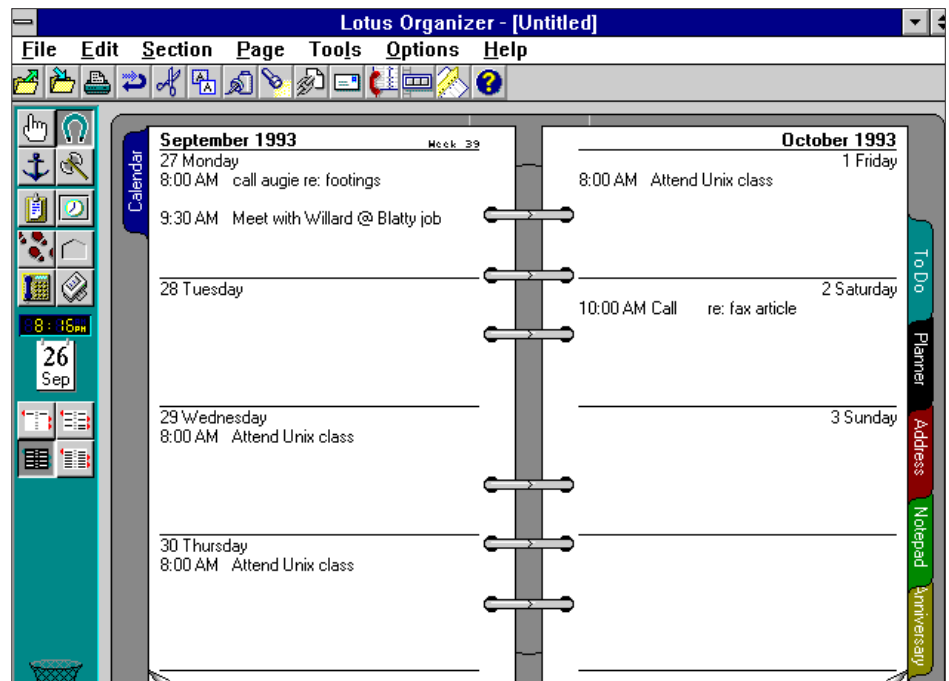
Lotus Organizer lets you keep track of the cost of the time spent at an appointment. Exporting this information to a spreadsheet makes it easy to create a time billing system that will be useful for designers and project managers.

The to-do list keeps track of tasks and allows you to add, update, or



**Lotus Organizer** (\$99) requires a 286 processor (386 or higher recommended), with 3Mb free space on a hard drive, 2Mb RAM, Windows 3.0 or higher, a VGA monitor, and a mouse. For more information, contact Lotus Development

Corp. (55 Cambridge Pkwy., Cambridge, MA 02142; 800/872-3387).



**Figure 2.** Lotus Organizer has the familiar look of a loose-leaf binder. Appointments made in the Calendar can be integrated with to-do lists, addresses, and notes stored in other parts of the binder.

delete items using pop-up menus. You can give items a start date, a due date, and a priority from 1 to 3. You can organize to-do items by project and automatically display them in the calendar, which saves retyping. Tasks are color-coded (texture-coded for monochrome screens) depending on whether they are overdue, current, future, or completed.

The address book lets you search for data in the complete text as well as in the field contents (like Company Name, Contact, and Type of Work), where you can use "filters" to limit the search to, say, only "concrete" or "plumbing" types. The address book also features an autodialer (used with a modem), a must-have item for those of you who live on the phone. And a phone log records the length of the call, and lets you name the person you talked to.

The notepad takes the place of all the scraps of paper that now litter your desk. It holds both text and drawings, as well as data from other programs. The notepad automatically creates a table of contents that you can organize into chapters, and is useful for dividing the notepad contents according to job. The yearly planner creates a Gantt chart (a bar graph) of planned activities and can be used for sketching out project flow. You can

even set up individual custom planners for each project.

Finally, Lotus Organizer allows you to tie together information from all the functions mentioned. For instance, you might want to link an address to an appointment, and a spreadsheet estimate to the same appointment. By clicking first at the "chain" icon and then at the information you want to link, you can combine everything into a single record. Double clicking on the link reference brings up all the information.

You can also access charts, contracts, invoices, and other data in separate programs using dynamic data exchange (DDE) links. The print options let you print mailing labels and create pages for your paper notebooks. And if you use either *cc-Mail* or *Lotus Notes* for E-mail, Lotus Organizer will automatically send messages, too. ■

*Craig Savage, a longtime builder and Macintosh user, owns Savage Co. in Carpinteria, Calif., and publishes the Macintosh Construction Forum and Windows On Construction.*

*If you have a question about computing in construction, address it to State-of-the-Art Contractor, JLC, RR#2, Box 146, Richmond, VT 05477.*