PIMs No 7

Personal information managers have come a long way since they were first developed over ten years ago. Not only are they a simple way to store and access addresses and appointments, many now offer sophisticated contacts tracking and project management facilities. We evaluate seven of the Pims currently available

Personal information managers (Pims) are like computerised Filofaxes. They offer quick and easy access to contacts, appointments, lists, notes, and all the other bits and pieces of information you carry around in diaries, address books and note pads.

In contrast to the good old-fashioned diary and address book, a Pim ensures all its data is kept properly structured and in order, with fast access to information available through searches, indexing and other mechanisms. There is little danger of permanently losing the vital data held in a Pim because it can be backed up simply by copying a few files to a floppy disk, which is far easier than photocopying an ordinary address book, for example.

Most Pims offer rather more than the basic contact, diary and notes facilities. Calculators, alarm clocks and world time facilities are very popular. Some of the Pims are multi-user, so they can also be used for booking meetings and conferences. In addition, many of the high-end products can provide sophisticated tracking of contacts and offer a number of other extras, such as expense reports, reminders, project management facilities and so on.

In this group test, we put seven key Pim products on the test bench, specifically looking at the range of facilities they offer, their ease of use and their value for money. One of these products is Windows itself, as there are several Pim accessories bundled with Windows. Although these facilities are often overlooked, they may be sufficient for many users' needs and certainly represent good value for money as they come for free, once Windows 3.1 or 95 has been purchased.

Commence 3

As well as the usual and predictable calendars, to-do lists and address books, Commence offers a more corporate flavour of personal information management, with facilities such as project planning, word processor integration and contact organisation.

The system allows you to organise your working day into a number of different areas, each with its own desktop tab card, which can be selected at the touch of the mouse. Different tab cards can be allocated for contacts, diary, notes and so on; alternatively, each card can be made to hold the vital data for different projects. In this form, you configure each card individually with the particular 'views' required, and the configurations can be saved so they are repeated for each session.

All of Commence's facilities are well integrated and it is possible to interconnect tasks, people, companies, notes and projects, resulting in a sort of 'web' of information which is accessible and changeable from the multi-user environment.
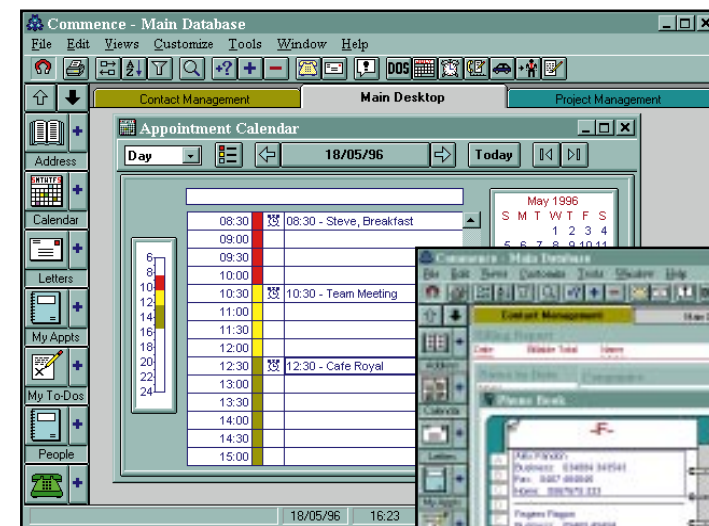
The key to working in this fashion is to understand the various views. Views provide different ways of looking at the core of information. The system comes preconfigured with nine main types of view, but others can be added. The key ones are billings, companies, expenses and notes; there are also views containing a phone book, to-do tasks and so on.

Commence has some moderately useful project planning capabilities. It does not offer the full critical path/project evaluation review technique (Pert) facilities that a full-blooded project planner offers, but it does allow tasks to be set up and dated.

In addition, there's a useful Gantt view which displays tasks with a horizontal duration bar, aligned in accordance with one or two stored date fields. This view is best used when you need to see the relative dates of a number of tasks in a project.

Commence data can be imported and exported in Ascii, dBase and DIF formats. It supports dynamic data exchange (DDE), which it uses for communicating with word processors like Ami/Word Pro, Word and Wordperfect, and Winfax and Eclipse Fax fax facilities, but it does not offer the more recent object linking and embedding (OLE).

Commence's DDE can potentially be used for communicating with other applications, where it can be made to operate in both client and server roles. There is a useful 'sync data' facility which allows each user to work with a dedicated private database for speed and reliability while also ensuring that each person's data is kept in synchronisation with everyone else's.

Commence makes a good standalone Pim but to get the best out of it the product needs to be seen in a multi-user workgroup environment, where it can be used, possibly in conjunction with e-mail, to arrange meetings, share contacts and so on.

○ £199
○ Now Distribution: 0181 288 3512

Commence 3

Performance	1 2 3 **4** 5	
Ease of use	1 2 3 **4** 5	
Features	1 2 3 4 **5**	
Value for money	1 2 3 **4** 5	

Left: The Commence appointment calendar in the main desktop view. Vertical colour bands in the diary differentiate different types of meeting.

Above: Commence's contact management desktop includes a Filofax-style address book. The buttons to the left provide access to the other major components in the system.

Info Central

Info Central is one of the components of the Novell Office suite, but is also available as a product in its own right. It offers all the major personal information management tools, including a calendar, to-do lists, address book and an index card system. These link with each other and with other components in the Office suite.

The main display area is organised into a stack of tab cards, with the tabs arrayed along the bottom. Each card is devoted to a different topic and it's easy to switch between them. The top of the display contains a line of menu options with a toolbar for performing the vital operations on each card.

Info Central offers many dif- ▶

Palmtops versus Pims

Pim software needs a bulky and expensive computer in order to run. This may not be a problem if you work with your computer running all day and envisage using it solely as an office application, but it is less convenient if you want to use the Pim diary, notes and address book functions outside the work environment. Even if you have access to a notebook PC, it will not always be convenient to access this vital information, held in this form, while on the move.

If you're looking for true portability, a palmtop organiser, such as the Psion 3a, HP Omnigo 100 or Sharp Zaurus, may be the answer. These devices offer all the main Pim facilities in a package that can be slipped into the pocket or handbag and used when you're out 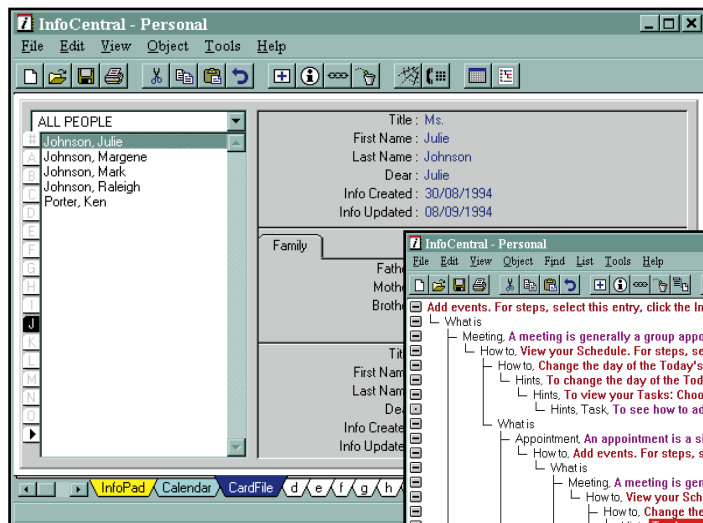of the office and also has a respectable battery life. They can also be connected to a PC for backup purposes or for data transmission in either direction, and can be connected to a conventional Pim if their data formats are compatible.

Many palmtops can work with standard format files, such as Word and dBase.

You may not like the palmtop's small screen and awkward keyboard, although this may not be a great disadvantage if you only enter data occasionally. Palmtops do cost somewhat more than a Pim, since they include both hardware and software. More significantly, they are less attractive in a corporate environment, where diaries and contacts must be communally accessible for conference bookings and contact management. In this situation, a high-end Pim is likely to be the only satisfactory solution.

ferent views of the underlying data, some of which are customisable. For example, the standard calendar view can be made to display day, week, month, or year information, all in an appropriate summary format. In any of these views the size of the various display areas can be modified and positioned to fit the needs of the particular application.

The core of the Info Central data is stored in 'iBase' information bases. This gives rise to an intriguing extra feature in the form of a number of pre-built 'iBase' information sources, providing worldwide facts, figures and contact numbers for a number of useful topics. Areas covered include business travel, computer companies, products and support. Not only do these information sources serve a valuable tutorial function, showing what can be achieved with the system, but the information is also useful in its own right.

Info Central features a 'Cardfile' facility, not to be confused with the standard Windows accessory of the same name. Info Central's Cardfile works in a similar fashion but is presented more elegantly and has a greater capacity, as well as offering links to other areas of operation in the system. Any number of Card catalogues can be built. Virtually any type of information can be set up in Card catalogues but typically they are used for names, addresses and contact numbers.

The Tools menu offers a number of interesting options, including facilities to access the Internet, countdown timers and alarms. In addition, there is access to the standard Windows calculator and file management programs, rather than the more usual home-grown facilities.

Info Central is a powerful system crammed with features. However, users will find it easier to get to grips with it if they are already familiar with using object-oriented software as the underlying object-oriented design has crept into the user interface.

Info Central has an interesting extra feature in the form of a number of 'iBase' information databases which are crammed with worldwide facts, figures and contact numbers for a range of key topics.
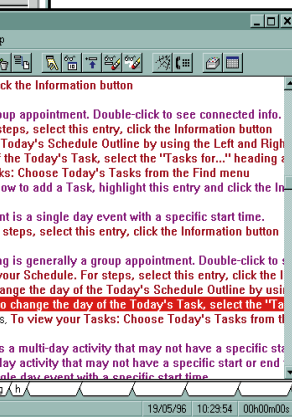
○ £79
○ Novell: 01344 724000

Novell Info Central

Performance	1	2	3	**4**	5
Ease of use	1	2	**3**	4	5
Features	1	2	3	4	**5**
Value for money	1	2	3	**4**	5

Sidekick 95

Sidekick's authors invented the Pim more than ten years ago, when it figured as one of two key products (the other was Turbo Pascal) that gave Borland International its kickstart. After several Borland adven-

Above: Info Central's outliner can be used as a notepad or for ideas processing. Part of the tutorial is presented as an outline and there are a number of useful information bases in this format as well.

tures and misadventures, Sidekick is now supplied by Starfish, the company recently started by Borland founder Phillipe Kahn.
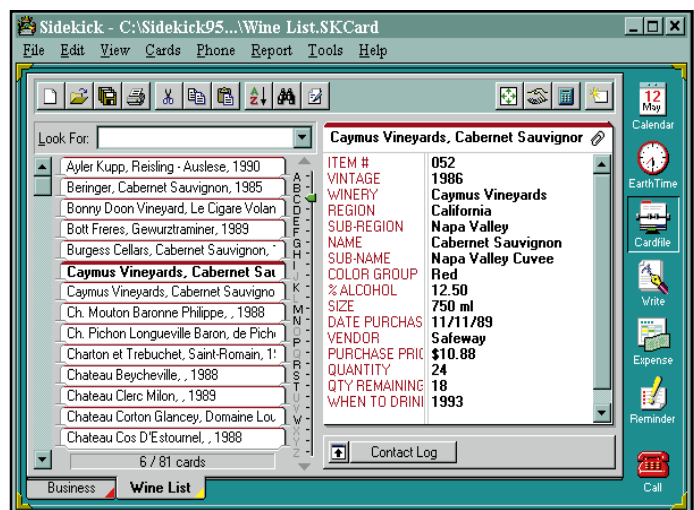
Sidekick offers the standard Pim blend of diary, address book and note taking, but extends these capabilities with facilities such as expense reporting, contact management and reminder. In keeping with its innovatory past, it is one of the first Pims to be available in a specific Windows 95 edition, Sidekick 95 (the Windows 3.1 version is still available).

It should be emphasised that although Sidekick can be run from a network, it is not a network application as such. In particular, simultaneous shared use of Sidekick data files is not supported, and it is, in essence, a single-user personal product. This can be seen as both a strength and a weakness. By steering clear of corporate communications, Sidekick remains simple to use but powerful within its own domain. On the other hand, it must be ruled out if you want a facility that can schedule conferences, share contacts and perform other corporate duties.

One of Sidekick's main ingredients is Cardfile, which bears no relation to the standard Windows Cardfile utility. It is considerably more powerful, offering much of the functionality of a medium-level flat-file database.

It can be configured to handle most types of data and different information bases are simultaneously accessible using a simple tab switch mechanism. There is a powerful option which allows you to send Cardfile cards by e-mail, using Microsoft Exchange. Another useful facility lets you import the Exchange address book into Cardfile itself.

The Calendar view includes the usual monthly calendar display, along with a page taken from the day's diary. In addition, the same screen includes a list of the day's

Right: The Sidekick 95 desktop showing a 'Cardfile' database view. On the right of the desktop are the icons to select the other key views.

tasks and any outstanding calls that should be made. If the PC has a modem these calls can be dialled automatically using the TAPI protocol, a Microsoft telephone applications standard.

The Expenses option is a simple application that should prove very useful in practice. No doubt it was built up by using the system's Cardfile capabilities, but it is presented as an application in its own right. Once entered into the system, the expenses are presented in a neat spreadsheet style with rows representing the different items and columns for different dates, along with totals. Several sets of expenses can be accommodated simultaneously.

Sidekick 95 is excellent value for money, packed with features and easy to use.
- ⭘ Sidekick 2.0 (for Windows 3.1) £39; Sidekick 95 (for Windows 95) £39
- ⭘ Starfish UK: 0181 875 4455

Sidekick 95

Performance	1	2	3	4	**5**
Ease of use	1	2	3	4	**5**
Features	1	2	3	**4**	5
Value for money	1	2	3	4	**5**

Windows

Windows itself has a lot to offer in the personal information management field. Both Windows 3.1 and Windows 95 come equipped with a bunch of useful accessories, including a simple word processor, an address book facility, a calculator and a clock. By putting these applications in the Start-up group, they can be left waiting in the background and are readily accessible in a couple of mouse strokes, just like any other Pim.

The Windows address book facility is actually a general-purpose index card filing system called Cardfile. Cardfile can be used to handle any textual information that can be fitted onto an index card, although it is most commonly used for organising contacts, names and addresses.

The index card presentation is crude by the standards of most Windows applications and the information capacity of each card is limited, but it only takes about two minutes to learn how to use Cardfile. It features a simple search facility which can quickly track down a contact, and the Windows 95 version even has an auto-dial facility which can immediately dial a telephone number from a card, using a modem.

All versions of Windows come with a simple word processor and text editor. The text editor (Notepad) is aimed principally at system administrators who need a simple facility to edit batch or INI files. The Write (Windows 3.1) and Wordpad (Windows 95) word processors are more likely to appeal to the average user.

Unencumbered by the enormous range of facilities embedded in the up-market word processors, Write and Wordpad are quick to load and simple to use. In short, they are ideal for note taking. With a bit of extra work and a reasonable-quality printer they are also capable of turning out basic business correspondence. All the Windows fonts and styles can be used and the information can be saved in Word-compatible files or in rich text format (RTF), making it easy to transfer to more sophisticated word processors.

The Windows calculator facilities are more than adequate for most users. The basic business calculator offers all the usual arithmetic facilities and can handle more digits than most ordinary desktop calculators. The scientific calculator has enough features and functions to intimidate any user who isn't a mathematician.

For the benefit of software developers it allows numbers to be displayed in hexadecimal, binary and octal formats, as well as the more usual decimal. A full set of trigonometry, hyperbolic trigonometry and statistics functions is also provided.

Unfortunately, there is no 'till roll' display capability, so its results are lost once a new calculation is started, but that is the only obvious omission from an otherwise excellent facility.

The Windows clocks are nothing to get excited about, although they are useful if you don't have a watch to hand. Windows 3.1 features a special clock program which can display either in digital or in analogue format.

The Windows 95 task bar permanently displays the time. You click on it with the left mouse button to see the date and with the right mouse button to see an alternative analogue display, which also permits a change of time zones and so on. There is no alarm facility in either version.
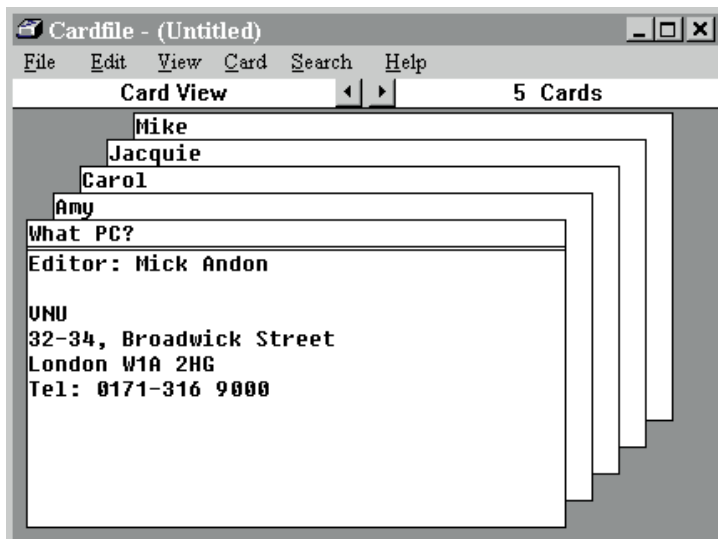
Some of the Windows Pim facilities may look a little rough around the edges when compared with the more up-market, professional products, but they should provide enough features for users with modest requirements. They also have the great advantage that, once you have bought Windows, they are all free.

Before you rush out to buy a third-party Pim, try out the standard Windows offerings. As they cost absolutely zilch they have got to be a bargain.
- ⭘ Windows Accessories: bundled free with Windows 3.1/Windows 95
- ⭘ Microsoft: 0345 002000

Windows Accessories

Performance	1	2	**3**	4	5
Ease of use	1	2	3	4	**5**
Features	1	**2**	3	4	5
Value for money	1	2	3	4	**5**

Corel Planner

Corel Planner offers a broad range of personal information management facilities, including contact tracking, appointments, notes, goals and expenses. On the screen it resembles a ring-bound paper-based planner, right down to the tab dividers.

Planner has a powerful calendar facility. Calendars can be viewed in daily or weekly formats for detailed information, or monthly or yearly formats for forward planning. The Plan view transforms the calendar into diary mode, where you can enter appoint-

📄 **Cardfile - (Untitled)**   _ □ ✕

File   Edit   View   Card   Search   Help

Card View   ◄ ►   5 Cards

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Left: Windows Cardfile is a simple index card facility with search and auto-dial capabilities.

Pims compared

Pim	Project planner	Auto phone dial	Arrange meetings	E-mail connect	Letters	Contact manager	Expenses	Windows version
Act!	○	●	○	●	●	●	○	3.11
Commence	●	●	●	●	●	●	○	3.11
Info Central	●	●	●	●	●	●	○	95/3.11
Organizer	○	●	●	●	●	●	○	95/3.11
Planner	●	○	●	●	●	●	●	95/3.11
Sidekick 95	○	●	○	○	●	●	●	95/3.11
Windows	○	●	○	○	●	○	○	95/3.11

● = Yes   ○ = No


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COREL PLANNER  --  C:\CDOFFICE\PLANNER\CDODB20.DB
File  Edit  View  Links  Options  Sections  Help
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Left: The standard Corel Planner presentation in the form of a screen version of a Filofax, right down to the ring bindings and tab dividers.

ments. It is also possible to plan tasks, to-do lists and general activities in the diary and assign priorities, if necessary. In addition, there are some useful facilities for managers to record expected deliverables from staff, and document messages and commitments, both sent and received.

The address and telephone directory can be used for personal and business contacts. The address book is organised alphabetically, very much like a real one. All the usual editing facilities are available, and it is easy to sort, list, select, copy and delete records using the command buttons underneath the menu bar. Custom and notes fields can be added to each entry, enabling the system to be configured for contact tracking.

The notes are not held in a free text format but in a linked record structure, which can be used to plan and document conversations and meetings with clients and co-workers. The linking is quite sophisticated and provides a mechanism which can be used to couple an action with the information necessary to complete the action. It can also connect with any other sections in Planner.

Planner also features a useful little utility for handling expenses. Expenses can be entered under various categories, such as travel, meals and so on. There is also a facility for tallying mileage, and new expenses categories can be introduced to customise the system to your individual requirements.

Planner's expenses summary can be tied into the calendar view. By default this is shown for the current month, but it is also possible for you to keep track of the expenses on a daily, weekly, monthly or yearly basis.
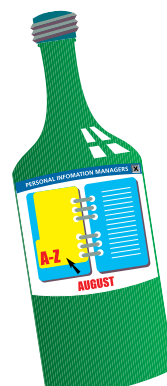
There is an interesting goals section in which goals can be divided into monthly, personal and organisational targets. Each of the goals has an attached note which can be used to list the steps for its accomplishment, with links between each step and a timeframe for achieving them.

Corel Planner's Filofax-style presentation makes it very easy to get to grips with, even when using it for the first time. Finding your way around the various facilities is as simple as clicking on the tab dividers.

○ £99
○ Channel Marketmakers: 01703 814142

Corel Planner

Performance	1 2 **3** 4 5	
Ease of use	1 2 3 4 **5**	
Features	1 2 3 **4** 5	
Value for money	1 2 3 **4** 5	

Lotus Organizer

Lotus Organizer is available as a product in its own right or as one of the components of Lotus Smartsuite 96. It includes a diary and appointment scheduler, a sophisticated notebook facility for handling personal information, a planner, a to-do list organiser, and several other other useful bits and pieces, such as a simple call logging facility.

The diary in particular is an elegant system. Its looks almost exactly like a real one, although it is considerably neater. The diary doesn't only hold appointment information, it also allows any day or period to be flagged with general objectives, tasks or activities that must be achieved at that time. These are highlighted and not given a specific time slot.

With the aid of Lotus's expertise in communications media, using Notes, ccMail or other network servers, it is also possible to access co-worker's diaries across a network to arrange group conferences and meetings. There is a collective display of all the diaries of those invited, so it is easy to identify an appropriate slot, or Organizer can find a vacancy automatically.

The same system allows conference rooms to be booked and invitations are sent out via e-mail. The recipients can accept, decline or delegate the invitation, with the meeting organiser ultimately seeing all responses.

Organizer offers powerful linkage facilities between its various components. For example, an appointment in the diary can be linked to the person's address in the address book, and it is very easy to flip between the two areas.

The address book holds names, addresses and contact numbers, and it is also integrated with other Lotus and system components. It can display contact details and it can be made automatically to dial the telephone number, initiate an e-mail message, or even start a letter with a given name and address using Lotus Word Pro.

Organizer's diary is a particularly elegant system ▶

Personal information managers

Pims compared (contd)

Pim	Manufacturer	Notebook	Address book	Diary	Calculator	Outliner	To-do list
Act!	Symantec	●	●	●	○	○	●
Commence	Commence	●	●	●	○	○	●
Info Central	Novell	●	●	●	○	●	●
Organizer	Lotus	●	●	●	○	○	●
Planner	Corel	●	●	●	○	○	●
Sidekick 95	Starfish	●	●	●	●	○	●
Windows	Microsoft	●	●	○	●	○	○

● = Yes ○ = No

Above: The Organizer diary features appointments and tasks or activities, which appear highlighted.
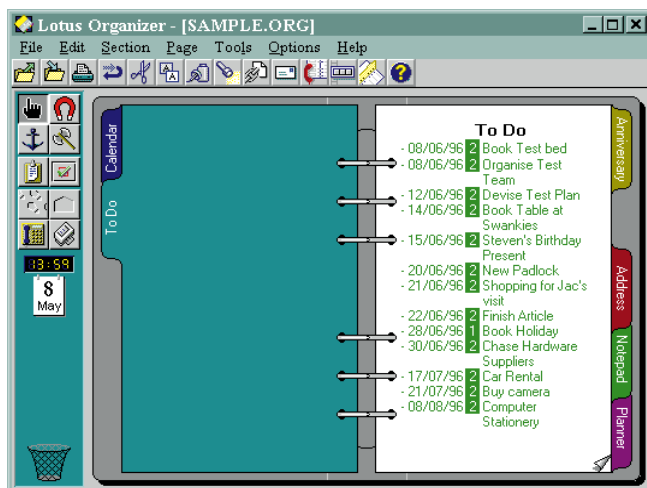
which strongly resembles a real one.

○ £99
○ Lotus Development: 01784 455445

Lotus Organizer

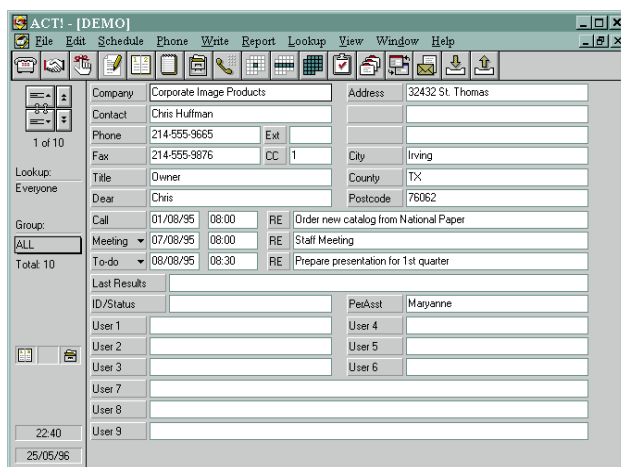|					
Performance	1	2	3	**4**	5
Ease of use	1	2	3	**4**	5
Features	1	2	3	**4**	5
Value for money	1	2	3	**4**	5

Act!

Act!'s forte is contact management but it also offers all the standard personal information management facilities. In particular, the system includes a calendar/diary facility, a report generator and its own proprietary word processor with mail-merge facilities specifically geared to business correspondence.

Act!'s core is its contact database, which is held in a dBase-compatible format. This contains 70 fields per record, many of them customisable. In addition, it has a notebook with a virtually unlimited capacity. The database can access records almost instantly by looking up a search criterion on any of its fields, quickly displaying names, addresses, phone numbers and other valuable contact information.

The main contact screen is very busy and takes a little time to get used to. However, it does offer rather more than most Pims when it comes to contact management. Apart from the usual names, addresses and telephone numbers, the system allows actions on individuals to be scheduled into the future and can attach automatic alarm reminders. This means that a promise to call back one week hence can be logged in the knowledge that you will get a reminder to make the call at the appropriate time.

Act! also keeps a history of all previous contacts with each individual in the database and allows you to append notes. It has multi-user capabilities, with each user being allocated to a set of individuals selected from the database.

A simple word processor is included with the system and this is on a par with Windows Write, although it does have a few useful extras, such as a spelling checker. Unlike Write, it has the great advantage that it can generate the bare bones of a letter almost instantly, directly from the database.

Thus if a phone call to a contact extracts a promise from you to forward some information, you can go directly from the main contact screen to the word processor and the letter is already half-written, with addressee, signatory and date already set up. Only the core of the letter waits to be written.

Act! also has some powerful reporting facilities. There are several predefined reports that provide printed information from the database in the form of address books, progress with contacts, activities completed and so on. It is also possible to design custom reports and install them as menu options into the Act! system itself.

Act! is comparatively expensive, although it is not really intended for the Pim user on a shoestring. Anyone wanting quality contact management facilities will not baulk at the price and will welcome its many advantages in this area.

○ £189
○ Symantec 01628 592222

Act!

Performance	1	2	3	**4**	5
Ease of use	1	2	**3**	4	5
Features	1	2	3	4	**5**
Value for money	1	2	3	**4**	5

Below: The main contact management screen in Act!. It looks complicated, but there are lots of useful contact-tracking mechanisms contained within it.

BEST BUY WHAT PC?

Sidekick was the first Pim and remains ahead of the field in terms of usability and power – as long as you are looking for a personal information manager and are not too bothered about merging your personal data with others. The product also benefits from not being merely a component in an integrated suite. This keeps it fast, simple and compact. At only £39, Sidekick's hardly likely to upset your bank manager and represents a very sound investment.

RECOMMENDED WHAT PC?

Act! has a totally different flavour from Sidekick. Its forte is contact management and it does it very well. Given that Act! also adequately covers the other Pim areas of diary, letters, meetings and so on, it comes highly recommended.

Mike Liardet