Macintosh Manages Matters By Cudgel

ebster's New English Dictionary defines cudgel as a short heavy club. By this definition, Green Light Software in Chicago has aptly named their case management program. It is a excellent weapon for organizing and retrieving case information with the click of a mouse button. Litigation attorneys will love Cudgel's ease of use, power and versatility.

Cudgel is a Macintosh-based application that uses the Double Helix relational database as a foundation. Double Helix is a unique database using an icon-based approach to database programming. Although Double Helix can intimidate more than a few beginners, its advantage is that any user can learn to build complex applications without having to write a single line of programming code.

It actually becomes more easy to use as you plunge further into its capabilities, unlike most database programming languages. We think icon-based programming will ultimately become the standard for the average user, and Double Helix is an excellent program for learning how to master this craft. One great feature of Double Helix is its multi-user version which can run on multiple workstations without the benefit of network software such as AppleShare or TOPS.

Cudgel comes with a run-time version of Double Helix, so you can get up and running in a few minutes.* If you want to customize Cudgel, you'll need to buy the full blown version of Double Helix, but then you can create your own forms and reports quickly and with little hassle.

The manual for Cudgel is full of information and a pleasure to read. Unlike most computer manuals, it is written in plain English, with ex-amples and diagrams for most every function.

Installing Cudgel is a breeze. Just copy the files on the program disk-ettes to your hard drive, which you'll need to run this program.

When you first start Cudgel, you'll get a screen where you can select the user function you want to use: Master, for most of the main Cudgel functions; Fill, for simple data entry and reporting; Docket, for entering docket listings; Trial, which has a special set of functions and is designed for fast information retrieval during trial; Im/Export, for loading data from other programs or dumping data to other programs; and Demo, which gives you an overview of the entire system.

After selecting a function, you can begin working with the program itself. All the user functions have a cleanly organized menu system: Enter, for data entry; List, for report-ing functions; QRY, to search for specific information; Make, where you generate the report that relates entries in different areas; and Fix, for data maintenance.

One nice feature is you can have several windows open for different functions on-screen at the same time. By doing this, you can bypass the need to use the menu and simply click on the window you want to work with. If you want to get real fancy, you can re-size the windows so you can have important informa-tion from several reports and/or forms on-screen at one time, getting all the information you want at once.

In the Enter menu, for example, you can input data for people in-volved in the case—be they defen-dants, plaintiffs, judges or witnesses. You can enter citation information, exhibit references, case facts, forms and documents filed with the court, costs and expenses. You can print a report of these, but you can't gener-ate a bill or invoice unless you customize. You can also enter case history, keywords and phrases, docket entries, and others. You can even import graphics created with a drawing/paint program or scanned in for on-screen reference.

After you've entered your data, you can generate lists that relate the information entered. If you want to see which laws relate to a specific issue in a specific case or which witnesses have exhibits, this be done just by making a menu selection. You can even use the program to generate simple forms using data already entered into the system.

The query function is easy to use. After you've pulled up a form or report on screen, select "Open Query," type in your search criteria, click the enter button, and the pro-gram will show the results on-screen.

The manual stresses the impor-tance of standardizing your firm's coding system for accurate searching, but uses obscure characters such as the pi sign (π) or the delta sign (Δ) as indentifiers in a few instances. We think the program should incorporate look-up tables for this purpose.

Cudgel makes excellent use of the features of Double Helix and we consider it a wise purchase for Mac-using litigation lawyers. Expect even more versatility when the features from Double Helix 3.0 are incorpo-rated into the program.   --T.G.

Our Rating of Cudgel

Number of Formats	*8*
Ability to Customize, Formats Desired	
	10
Training, Help, Manuals	*9*
Speed of Input, Output	*9*
Flexibility, Use with Other Software	*7*
Screen and Report Comprehension	*9*
Sophistication	**10**
Ease of Use	**10**
User Satisfaction	*9*

Software Summary

Cudgel. *Elan Associates/Green-Light Software, 79 West Monroe, Suite 1320, Chicago, IL 60603-4929. 312-782-6496. Cudgel sells for $650.*

*The Cudgel demo comes with a record-limited run-time Helix; full Cudgel requires Double Helix.

MacWEEK

A Helix template for lawyers and real estate professionals

While Market Master is designed with the sales professional in mind, another interesting Double Helix application is intended for lawyers, real estate professionals and others who need to keep track of their clients.

Developed by Chicago attorney Daniel L. Kegan, it's called Client Portrait. To use the program, you'll need a copy of Odesta's Double Helix.

The software template helps professionals organize, retrieve and maintain information about their clients. It also tracks adverse parties, prospective clients, ex-clients, referral sources, associates, government officials and anyone else important to an attorney's work.

Operation is straightforward and simple, but a bit slow at start up. Although the software isn't designed to be a sales/marketing tool like market Master, it does allow the user to create personalized letters, mailing labels and labels for billing.

In its turnkey mode, it operates from three custom menus" Enter Data, Report and Letters.

On-screen help is available, including suggested formats to ensure accurate and consistent data entry.

Unlike Market Master, Client Portrait is open-architecture software. Thus, as users become more experienced, the full set of Double Helix's six structural icons and 81 programming calculation tiles are available to personalize the client information system.

Copies of Client Portrait are available for $69.95 from Elan Associates, 79 W. Monroe, No. 1320, Chicago, Ill. 60603; (312) 782-6496.

— By Mike Nikolich

Writing law office manuals, computerizing law practice

Every law office needs a written office manual, a comprehensive document useful both as a teaching tool for new employees and as a reference source for long-timers. Not every law office has an office manual, and we suspect many that do don't have a very good one. And even the good ones are either under continual review or somewhat out of date.

This week we look at very low-tech assistance for the lawyer or office manager who is given the unenviable job of creating one. We also look at a book that promises to tell us how to practice law with computers.

Cadence PPM, ABA office manual

We received the Cadence Policy and Procedures Manual (PPM) as an Apple Macintosh-formatted disk with 15 Microsoft Word files totaling 400 kilobytes. "Installation" involved nothing more than copying the contents of the disk to a new folder on our hard disk.

We double-clicked the file name of the first file. The Macintosh noted that the file was created by Microsoft Word, located and loaded Word, then loaded the data file. (This capability to automatically launch an application by double-clicking on a data file's name or icon is not, of course, an innovation of Cadence, but is built into the Macintosh operating system.)

Most Macintosh word processors convert Word files, but if your word processor doesn't, the author will provide the files in your choice of formats. In fact, the author, a confirmed long-time Macintosh enthusiast, will even provide disks in MS-DOS format, if necessary.

As a printed copy of the document is not provided, we first printed it out from the disk. The files were linked so that after beginning to print the first file, we had only to fill the paper tray and empty the delivery tray until the last page of the last file was complete.

The American Bar Association's Law Office Staff Manual came in both ASCII and WordPerfect 4.2 formats. We copied the 18 files totaling about 325,000 kilobytes in the WordPerfect format. The ABA manual includes a printed copy with the disks, making a preliminary printout unnecessary. The

Law technology review

By BARRY D. BAYER
and BENJAMIN H. COHEN

Benjamin H. Cohen and Barry D. Bayer practice law in Chicago and Homewood, respectively. You may contact them at Law Office Technology Review, P.O. Box 2577, Homewood, Ill. 60430, or by sending e-mail to !bbayer on ABA/Net, bbayer on BIX or MCIMail, or bbayer@bix.com on the Internet.

WordPerfect version includes auto-paragraph numbering setups, making it unnecessary to renumber paragraph as you insert, delete and move paragraphs to suit your purposes.

The concept

The two products are similar in concept, each providing the outline of a law office manual, with suggested policies, forms and examples. Each provides extensive bibliographies. Neither product attempts the impossible task of producing a finished manual. We think of both products as manual kits.

The two products do differ in style and emphasis. Although either manual is adaptable for a small or large firm, Cadence is definitely written from a small-firm perspective, while the ABA manual seems to have the general perspective of a much larger firm.

Cadence, for example, includes a checklist detailing such things as the name of the staff members responsible for checking for overnight fax messages in the morning and closing the supply door at the end of the day. The ABA manual includes a policy explaining that all word processing center documents are produced ASAP and that any document needed within 24 hours must be marked RUSH.

Cadence is written with a light touch; the ABA manual, by contrast, seems stodgy and in some cases simply overwritten. (Is it really necessary to include seven alternative paragraphs claiming that publication and delivery of the manual does not constitute a contract of employment?)

Both products include suggested

statements as to vacation and smoking policies, but Cadence is also a repository of post office state abbreviations, local court motion practice, word processor letter setups, and standard equipment that should be available at each desk.

Also included in Cadence is excellent advice, particularly to young attorneys, on matters such as how to break bad news to a client. As a bonus, the author has tossed in application and interview forms, acceptance and rejection letters, and even a series of legal assistant employment tests. We would like to see a good index, but the table of contents makes it possible to find what you need.

Both products have text in the computer rather than written in stone. Use these programs as checklists and departure points. The manual completed from using either product as a starting point should show the personality of the firm.

Value

If you are in the process of drafting an office manual, either product will help, and they are well worth the money. Buy both, if you can, but if you decide to purchase only one, we prefer Cadence, particularly for small offices and for attorneys opening up a law office for the first time.

Practicing law with computers

Perhaps the most difficult part of writing these columns is presenting sometimes-difficult technical subjects with a restricted word count and a minimum amount of computer jargon. On occasion we use too much jargon, and do hear about it from readers. Life would be much easier if all of our readers either had vast computer experience or a copy of Professor Henry Perritt's "How to Practice Law with Computers."

This 1,200-page volume from the Practicing Law Institute begins with an easy-to-understand chapter on basic computer concepts. The book continues with material on word processing and desktop publishing, telecommunications, computer-assisted legal research, financial analysis and spreadsheet software, and database management. Final chapters concern automating the law office, management issues and artificial intelligence. The

author combines an engineering and business school background with his law practice and teaching experience to present a book which can be understood by the practicing lawyer who is also computer-disadvantaged.

The book's design is to present, with respect to each major topic, the type of practice activity covered, an "overview" of the technology, a discussion of specific products, management considerations, and abbreviated "case studies" of how law firms have used the technologies. The book is replete with footnotes including addresses and phone numbers, as well as a good index, and can function as a resource directory.

The overview tends to provide a bit too much history for our taste, and the specific product discussions sometimes are out of date, which is understandable in a year-old book. We could quibble with some of the history, and wonder about such undocumented comments as "A major weakness of LEXIS is that its database contains significant errors that are never corrected."

At $110, "How to Practice Law with Computers" is expensive. Lawyers who are experienced computer users will find the book interesting. But we think that specific discussions on the technology and how it is used and might be used in the future will prove invaluable for lawyers who are not well-acquainted with computers but feel an understandable pressure to automate.

Summary

The ABA's Law Office Staff Manual and the Cadence PPM manual are two different approaches to the creation and maintenance of a law office manual. Either would be a big help if your existing manual needs work, but we prefer the Cadence approach, particularly for young lawyers and small offices.

Professor Perritt's "How to Practice Law with Computers" presents a wealth of information about computers generally, and law office automation specifically. Invaluable for the computer-disadvantage, even experienced computer users will find it useful.

Details

Cadence PPM — Policy and Procedures Manual, Version 2.0, by Daniel Kegan. Requires Apple Macintosh computer running Microsoft Word, or other word processor. Available in other formats. Price: $69.50. Greenlight Software, a division of Elan Associates, 79 West Monroe, Suite 1320, Chicago, Ill., 60603-4969. Phone: (312) 782-6496. Fax: 312-782-6494.

Law Office Staff Manual, Model Policies and Procedures for Law Office Personnel, Second Edition, by Berne Rolston, Revised by Robert C. Wert and Howard I. Hatoff. Requires IBM-PC or compatible. Price: $79 for members of the ABA Section of Law Practice Management, $89 for non-members. American Bar Association, Order Fulfillment, 750 N. Lake Shore Drive, Chicago, Ill., 60611. Phone: (312) 988-5555.

"How to Practice Law with Computers," Second Edition, by Henry I. Perritt Jr. 1,208 Pages. ISBN: 0-87224-038-X. Price: $110. Practicing Law Institute, 810 Seventh Ave., New York, N.Y., 10019. Phone: (212) 765-5610. Fax: (212) 581-4670.

WINNING WITH COMPUTERS

TRIAL PRACTICE IN THE 21ST CENTURY

JOHN C. TREDENNICK, JR., EDITOR

Cudgel—My Litigation Companion

Daniel L. Kegan

Dan Kegan developed the Cudgel case management system while keeping up with the demands of a busy trial practice. The article not only offers an in-depth look at another good case management system, but also shows you how a case management system works on a Macintosh.

I am still amazed at how quickly motion practice, briefs, and discovery fatten a litigation file. Even before a single deposition, the same document may appear as an exhibit in several briefs. Casual notes from the client's history, taken before the complaint was filed, become important guidelines for information streaming into discovery. Then there are the simple questions. What are the fax number and the phone number of adverse local counsel? Which courtroom holds the judge?

Several years ago, I started a prototype litigation database using the ThinkTank outliner on the Macintosh computer. I knew I would want data on Evidence: exhibits, witnesses, and depositions; and on Law: issues, elements to prove, cases, citations, and statutes. I quickly set up my outlined database . . . and waited for a dispute big and long enough to use it. In the meantime, I kept skimming the ads for litigation support and case management floating across my desk, reading the Law Practice Management computer division newsletters, and recording in my notebook ideas of data fields and reports to include in the litigation system.

Outliners can be a big help in organizing data. This is particularly true given the power of current outliners with cloned data fields where one item of data can be in multiple places such as listing evidence by date, by author, and by exhibit number. Nonetheless, I found limitations in the essentially one-dimensional outliner. A relational database seemed the heavy-duty foundation I wanted for a computerized litigation system.

During 1989, I had the incentive to accelerate the program development from rustic outliner to powerful litigation companion. What should have been a simple trademark dispute was growing into a multi-party, multi-district litigation. I had planned on using a quiet week in August to work on another project. My priorities shifted, however, and after some afternoons and evenings, I had the framework and key programming of a relational database completed. I called it the Cudgel litigation companion.[1]

I first wanted to track filed pleadings. In our precomputer days, our firm typed a table of contents for each pleadings book. When we first purchased computers, we shifted to word processing. We sometimes had clean contents sheets, alternating with handwritten updates when it seemed too much trouble to go back to the computer for just one or two items.

The major areas I wanted to entrust to the computer were evidence and cases. What information had we already obtained from the defendant? How did that square with the current denials in its discovery reply? What had we already produced? How should we support our claim of discovery abuse if the defendant again requested information it already had from prior discovery?

Those were my early questions. Commuting to and from work, I would muse on the best structure for putting data into the computer and

the final reports I wanted. The program evolved as the litigation enlarged. As the case grew, associates and law clerks joined me in using Cudgel to control the litigation and their experience indicated which interface features and reports were not yet clear and intuitive.

Having others input data required that I make explicit the data entry conventions I had developed over the years, such as putting most important words first in data fields, avoiding passive constructions, and using consistent abbreviations. These general principles and other specific conventions for particular data fields were articulated and memorialized in both the program manual and on-screen help. You could probably attach a computerized notation in some database programs for on-line assistance.

When we needed an updated estimate of litigation costs, we included a set of financial reports. We still use Timeslips for the Mac for our daily time accounting and monthly billing, but our litigation-support database puts the key monthly litigation expenses into focus.

When the defendant infringed a second trademark of plaintiff, the program was again expanded to include a multi-case ability. The ability to handle two separate cases involving related parties also allowed the program to be used in cases with unrelated parties but similar legal issues. In that instance, you could copy the existing database, retain the legal citations and facts needing to be proved, and delete the old case-specific evidence.

Cudgel is not a litigation-support free-text retrieval system. Sonar provides that function on the Macintosh fairly well. Free-text retrieval is appropriate where much text and many depositions are involved. Our litigation needs required a more structured and flexible approach. I wanted to incorporate each of the following items into a workable system:

1. exhibits to support all my claimed facts,
2. facts to support all my points of law,
3. law to support each issue in dispute,
4. a clear listing of how many outstanding matters were pending in the case,
5. when the due dates were,
6. which matters we were responsible for,
7. a list of our key citations, with the dates they were last checked in Shepard's,
8. an account for multiple occurrences of the same piece of evidence,

9. a simple way to include logos and other graphic evidence in the system, and
10. a docket calendar system attuned to litigation.

CUDGEL'S LOGIC

In litigation, everything is connected to everything else, with frequent time deadlines. I consider myself fairly organized. Yet, to preserve some order when one's adversary and the increasing entropy are creating chaos, the litigator must organize, retrieve, and analyze the information funneling into the case.

Much litigation focuses on statements of law and proving facts. Witnesses introduce evidence, evidence supports facts, facts and points of law support issues, issues define matters to be decided by the court, and papers are filed to influence the decision on various matters (Figure 3.50).

With a powerful relational database environment, you can build a litigation system where you usually enter an item of data only once. The data appear on any lists to which they are generally related. Of course, you still have to decide what should be related to what; the computer simply makes relating and clean list making easier.

CUDGEL'S STRUCTURE

Data in any relational database, including Cudgel, are stored in several "relations." A relation is a group of similar data records that can be related by at least one data field in common. Cudgel relations are alphabetically titled.

Actors. This relation covers people, parties, counsel, and witnesses; names, addresses, and phone numbers.

Bench. This is the control center for Cudgel. Bench has only one data record, but it controls which case is dealt with, the titles for reports, and other key parameters.

Cites. Full case citations, with comments, are in this relation.

Dup. This relation keeps track of duplicate evidence—the same item given different exhibit numbers, or appearing as an exhibit in different motions.

FIGURE 3.50: Litigation Flowchart

```
        >Papers

  Matters

        >Issues      >Facts      >Evidence     >Witnesses     >Questions

                     >Law        >Citations                   >Answers
```
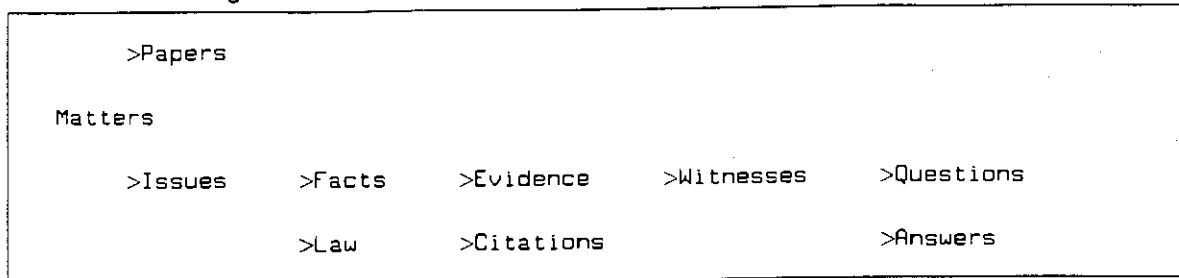
Evidence. This relation keeps track of the smoking gun, the bullet, the product label, admission 17, document production 314. Graphics may be readily included.

Exhibits. A subset of Evidence, only the exhibits to be used in court, at a hearing, or trial are in this relation.

Fact. Facts prove or disprove, e.g., plaintiff first used the trademark Dickens in Illinois on January 7, 1947.

Gage S. This relation keeps track of litigation expenses, both for services and other costs.

History. Chronological data of the case are in this relation. It is helpful in taking an early case history from the client, or later for refreshing memory for key dates and events. This is also the relation in which Docket entries are made.

Issues. This relation covers such items as whether the plaintiff has priority in trademark use.

Jury. (In development.) Space is provided in Cudgel for jury-specific data. However, since I have not participated in many jury trials, I have not yet implemented this section. I would like to hear from litigators what data and reports would be helpful.

Key. This relation covers key word, date, number, and time searching.

Law. Statements of the law are connected to a record in the Cites relation for a full citation.

Matter. Matters pending decision are included here, e.g., trademark infringement, copyright counterclaim, or Rule 11 sanction.

Notes. Free-form notes go in this relation.

Orders. Court orders are a subset of the Papers relation.

Papers. Pleadings, motions, briefs, and discovery documents are in this relation.

Questions. List questions and expected or actual answers here for depositions, direct, or cross-examination.

Refract. This relation co-ordinates related records in different relations.

Users. Specialized menus for different tasks, with differing commands, and variable access permission are here, depending on the User selected.

Witnesses. This relation keeps close track of exhibits expected to be introduced and facts to prove. Witnesses are a subset of the Actors relation.

X. This symbol is used for one or more of the alphabetic relations or commands.

Z. A special relation is for the demonstration version of Cudgel.

COMPUTER AND PAPER USES

Cudgel was designed to make optimum use of today's powerful, portable computers. I also use a paper trial notebook. Sometimes, the paper version seems easier than the electronic.

I have not taken this program into the courtroom yet (my seminal case settled), but fond as I am of my Macintosh computer, I still do not trust electrons without backup. I would use Cudgel on-line in court to log exhibits and to review questions, but I would want a second chair to maintain the paper records. I hope I would not need the paper. The computer lists are always clean, updated, and faster. But if needed, we could ask for a recess and revert to mechanical aids.

USERS AND MENUS

In developing Cudgel, I began with a master menu, which has access to everything. (See Figure 3.62 at the end of this article.) When a law clerk began entering data, I created the fill menu set, which can fill in and revise data, but cannot delete records. I wanted to be able to edit the clerk's work, and was concerned about inadvertent deletions. (See Figure 3.51.)

FIGURE 3.51: Fill Menu Set Screen

🍎 File Edit Set View Enter List Qry Make Fix	🔺

FIGURE 3.52: Docket Menu Set Screen

Enter	Make Docket
Title/Date	Due Date/H
Actor	Past Due/H
History	Month
Note	Week
Paper	Day
....	Who
Cudgel®s	Who Backup
Feedback	Where
	Case
	....
	HistoriesQ

The docket menu set has limited commands. The docket user can enter report titles, key actors, dates, notes, and pleadings and papers, and provide feedback for Cudgel improvements. The docket user can list due dates for a given case, for all pending cases, due the next day, the next week, due the next month, ordered by date, by responsible lawyer, by backup lawyer, by location, and by case. (See Figure 3.52.)

A sample docket listing shows due dates, times, expected completion times, unusual locations, the event and case, responsible person, and backup. (See Figure 3.53.)

For trial use, I wanted a set of menu commands geared for use under pressured time demands. I removed commands unlikely to be needed in court. Of course, the information still resides within Cudgel and a fast change to another user's menu set could access it. The ability to actually change menu command sets is very convenient. The focus for the trial user is on witnesses, exhibits, and facts: elements needed to prove your case and to disprove your opponent's case. (See Figure 3.54.)

The key commands provide searches of previously identified text, dates, numbers, and times, and can link to exhibits, witnesses, questions, or anything else in Cudgel.

The final command set is for the import and export of Cudgel data. Eventually even the largest disk drive fills with data. Today's hot litigation cools to tomorrow's ash and cinders. The import/export menu set provides the way to import and export any defined subset of data. The data can be saved in the archived case file, printed, or simply deleted and database storage recovered.

The fix menu provides commands focused on Cudgel software, rather than on the case. Cudgel provides a list of all focal litigation cases, together with the responsible lawyer, the court docket number, and related information. (See Figure 3.55.)

Several of the key relations are provided with three boxes, as shown in the lower right of Figure 3.56.

These boxes provide a consistent and convenient place to temporarily group data. The "Name Box" command provides a place for retaining the descriptions for these temporary groupings. The temporary groupings can then be listed by restricting the list using a query.

The query data form looks similar to the data entry form, except that rectangles are replaced by ovals. In the examples below, the query for evidence has been restricted to showing only evidence where the author's last name starts with "Frid." Figure 3.62 was provided by Joe Friday, in the Alpha-Zed case. A more complex search restriction would be—evidence after 1987, written by Friday, sent to Columbo, regarding San Francisco. Both the query oval and the evidence data screen are shown. Helix readily accepts graphics too, shown in Figure 3.57, scaled to fit a 1½" square.

Citations are another key focus of brief writing. Cudgel accepts citations, which can be used simply to identify a case or to pinpoint a holding or a nice quote. Entering the data separately field by field permits efficient database searching. Helix's calculation tiles put the pieces together for a *University of Chicago Maroon Book* style citation. The same data entry screen can be used for pending cases, LEXIS cases, statutes, periodicals, and books. All critical information is preserved, although strict ordering for *Blue Book* style isn't. It could be programmed but I do not think it is needed. (See Figure 3.58.)

FIGURE 3.53: Sample Docket Listing Screen

	Due Date/H			
Cudgel Manual & Tutorial	GreenLight Software/ Elan Associates		Dec 18, 198:	
Docket, Listed by Cudgel®	Elan (GreenLight)			
Time Start/Stop Date/ Where Event/Case			RecH	Responsible.
02:00 PM Oct 27, 1993 Settlement Conference with Magistrate Solomon				Webster II, D
04:00 PM	Elan (GreenLight)		2	Kent, R
09:30 AM Feb 29, 1996 Pretrial conference with Judge Davids				Webster II, D
12:15 PM	Elan (GreenLight)		3	Kent, R
09:30 AM Feb 3, 1999 Deposition: Michael Smith				Kent, Robin
05:30 PM Northampton, MA Elan (GreenLight)			4	Webste

FIGURE 3.54: Menu Commands Screen

🍎 File   Edit   Set   View   Enter   List   Qry   **Make**

```
E<Witnesses
Facts<E
W<Exhibits
-----------------
Key Text
Key Date
Key Numbr
Key Time
-----------------
Title/Date
Name Boxes
FeedBack
Order NDIL
```

FIGURE 3.55: Fix Menu Commands Screen

🍎 File   Edit   Set   View   Qry   Port   **Fix**

```
Title/Date
Cudgels
Name Boxes
Tally Recs
FeedBack
```

FIGURE 3.56: Boxes on Evidence Screen

```
╔════════════════════════ Evidence ═══════════════════════╗
║ Cudgel Manual & Tutorial          GreenLight Software/ Elan Associates  ⬆ ║
║     Line E◇  Footprints, under balcony, Plaster casts.               ║
║ Exhibit/Q#        10              Marked As        10                ║
║    Date E  Dec 7, 1994            OfferedBy  π                       ║
║  Status E  Offered                Admitted?  Y                       ║
║ Confidntl?  □                        Series  Preliminary Injunction  ║
║    Multi E                            Trial  NDIL                    ║
║    Source  NYPD                        Pic>                          ║
║ AuthorLst  Tracy II                                                  ║
║ FirstAuthr Richard                                                   ║
║  RecipLast                                                           ║
║ FirstRecip                                                           ║
║  Location.                                                           ║
║   Hot(±%)         75                                                 ║
║    F Rec#          8   A journey of a thousand leagues begins with but a single step ║
║                                                        Alpha-Zed     ║
║ ┌────────────────────────────────────────────────┐                 ║
║ │ 10   │ Dec 3, 1989  00:00 │ dlk │      13      │ │                 ║
║ │ Rec E│    Revised         │ By  │ CaseRec Box1 2 3                ║
╚══════════════════════════════════════════════════════════╝
```
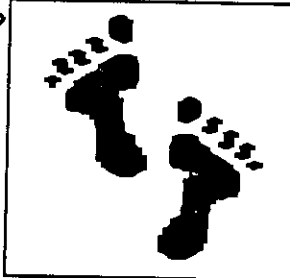
FIGURE 3.57: Query Data Form Screen
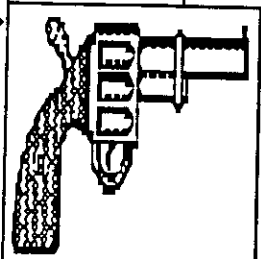
```
╔══════════════════════════ QyE ═══════════════════════════╗
║                                                           ║
║     Line E◇ (                                    )        ║
║ Exhibit/Q# (                    )                         ║
║    Date E  (                         )                    ║
║  Status E  (                    )                         ║
║ Confidntl? (      )         ╔════════════ Evidence ══════════╗
║    Multi E (      )         ║ GreenLight Software/ Elan Associates ⬆║
║    Source  (          )     ║                               ║
║ AuthorLst  ( AuthorLast starts )  Marked As      11         ║
║ FirstName  (                )    OfferedBy  π               ║
║ ReciepLst  (            )        Admitted?  Y               ║
║ First Rcpt (          )             Series  Preliminary Injunction ║
║  Location. (            )            Trial  NDIL            ║
║   Hot(±%)  (          )               Pic>                 ║
║    F Rec#  (      )(      )                                 ║
║ (                )                                         ║
║ (                )(          )                             ║
║                                       Alpha-Zed            ║
╚═══════════════════════════════════════════════════════════╝
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FIGURE 3.58: Citations Screen

FIGURE 3.59: Cudgel's Actor Relation Screen

Cudgel's Actor's relation keeps track of parties, counsel, witnesses, judges, judges' clerks—all those names, facsimile numbers, and notes you want sometime. (See Figure 3.59.)

All Cudgel data entry screens keep track of the date each record was last revised and who revised it. Cudgel assigns each record a unique identifying number. These fields make database management and maintenance efficient.

Data entry screens show how to neatly input data. From the simple docket calendar previously shown to a listing of the moving papers filed for a given matter or a list of exhibits, all information is entered only once. (See Figure 3.60.)

The program will also list the exhibits about which each witness is expected to testify. (See Figure 3.61.)

Our case management program reflects our litigation philosophy and helps me keep order in the fray. It can help to keep your evidence and cases in order. Figure 3.62 shows the full set of master menu commands for the program.

FIGURE 3.60: Data Entry Screen

≣☐				Matters<P					☐≣

Cudgel Available   GreenLight Software/ Elan Associates

Box1 2 3 π/Δ Matter Title

				Ball	**Ball Due**	**StatusM**		**DateM**	**Served/TabP**	**Re**
			π		Complaint: Trademark Infringement, Misappropriation, Correct TM Register					
			Δ		June 17, 1989	Filed		Mar 27, 1989	Mar 27, 1989 1	
π	Complaint							Mar 27, 1989	1.0	
π	Summons Receipt & Complaint Acknowledgment							Mar 31, 1989	2.0	
Ct	Order: Setting preliminary pretrail status hearing							Apr 13, 1989	3.0	
Ct	Preliminary Pretrial Scheduling Order							May 16, 1989	5.0	

FIGURE 3.61: Exhibits Screen

≣☐			W<Exhibits				☐≣

Cudgel Manual & Tutorial   GreenLight Software/ Elan Associates   Nov 14, 198

Witnesses with Exhibits, by Cudgel   Elan (GreenLight)

Witness's Name   Party   LastDe
RecA
Marked   Evidence Line   OffdBy Admitt
Smith, Michael Heinlein   W   Dec 17, 198:

001	GREENLIGHT Federal Trademark Registration ® 1,480,540	π	Y	3
002	Specimen, First Use	π	N	4
003	Current Product Label: GreenLight	π	Y	5
A	Defendant's Infringing Product Label	Δ	Y	6

Remembering the meaning of Cudgel, we try to speak softly and carry our Cudgel companion.

PRODUCTS MENTIONED

Cudgel, GreenLight Software, 79 West Monroe No. 1320, Chicago, IL 60603-4959, phone 312-782-6496.

Double Helix, Odesta Corporation, 4084 Commercial Avenue, Northbrook, IL 60062, phone 708-498-5615.

Macintosh Computers, Apple Computer Inc., phone 800-538-9696.

Microsoft Word, Microsoft Corporation, 16011 N.E. Thirty-Sixth Way, P.O. Box 97017, Redmond, WA 98073-9717.

Sonar, Virginia Systems Software Services Inc., 5509 West Bay Court, Midlothian, VA 23112, phone 804-739-3200.

SuperPaint, Aldus Corporation, 411 First Ave. South, Seattle, WA 98104-2871.

Timeslips III for the Mac, Timeslips Corporation, 239 Western Avenue, Essex, MA 01929, phone 508-768-6100.

FIGURE 3.62: Full Set of Master Menu Commands

⬛	Enter	List	Qry	Make	Fix
About Helix...	Actor	Actors	ActorsQ	Order NOIL	Title/Date
Get Info...	Cite	Cites	CitesQ	E<Witnesses	Cudgel®s
Why?	Duplicate E	Dups	EvidencesQ	W<Exhibits	Name Box
Help	Evidence	Evidences	FactsQ	....	Tally Recs
Custom Help	Exhibit	Exhibits	Gages $Q	Due Date/H	Feedback
....	Big Pic	Facts	HistoriesQ	Past Due/H	....
	Fact	Gages $	IssuesQ	....	A Clear
	Gage $	Histories	LawsQ	Facts<E	C Clear
	History	Issues	MattersQ	Issues<L	E Clear
	Issue	Laws	NotesQ	Laws<F	F Clear
	Key	Matters	PapersQ	Matters<P	G Clear
	Law	Notes	QuestionsQ	....	H Clear
	Matter	Orders/P	ReMatchesQ	Key Text	I Clear
	Note	Papers	....	Key Date	L Clear
	Paper	Questions	Shep Any	Key Numbr	M Clear
	Question	ReMatches		Key Time	N Clear
	Re Match	....			Q Clear
	ReREFNQ	Shepardize			

ENDNOTE

1. The Cudgel litigation companion was developed for use with Apple's Macintosh computer and Odesta's Double Helix database environment. The same design principles incorporated into Cudgel also apply to MS-DOS, Unix, or other hardware platforms and to other relational database programs for those environments. The actual program implementation would be different, but the simple principles that I used to construct Cudgel transcend any particular hardware or software platform.

Daniel Kegan's *software development grows from his national trademark and computer law practice with Kegan & Kegan, Ltd.*