Legal practice management

software solutions review

Practice support

Queensland Law Society

Forward

About the guide

Queensland Law Society is often approached by practitioners seeking advice and guidance in relation to practice management software solutions and electronic trust accounting requirements. Following the well-received publication of the 'Review of Legal Practice Management Systems' in 2004, Queensland Law Society again commissioned a consultant, Kate Hart, to undertake a review of the Legal Practice Management Software Solutions available to Queensland Practitioners.

The guide has therefore been designed to provide practitioners with alternative systems information at the highest level to help them to identify which solutions are best suited to their practice.

The research process

Vendors of practice management systems were asked to complete a functionality checklist and asked to complete this, indicating which areas of functionality were addressed by their product(s). The responses were then reviewed by the consultant with the final table in section three showing those areas of functionality agreed between the vendor and consultant.

About the researcher/consultant

Kate Hart is the principal of KD Hart Consulting, an independent consulting practice, offering information technology consulting services to the legal profession in the areas of practice management solutions, work process development, overseeing and implementing productivity improvements, litigation support and training.

Kate commenced working in the legal industry in 1988 as the Brisbane Manager for the litigation support group at Morris Fletcher & Cross (now Minter Ellison). Kate is still involved with providing litigation support and advice to legal practices, and is a member of the Association of Litigation Support Managers (ALSM).

Since 1992, Kate has also been providing advice in relation to the installation and management of a broad range of application programs used in the legal profession. More recently, her main areas of focus have been to:

- recommend and oversee the implementation of practice management systems for small to medium sized legal practices;
- develop complex workflow processes for various areas of law to improve efficiencies within the conduct and management of files;
- develop and automate precedents for use within the practice;
- introduce or redevelop intranet facilities to enable and encourage the sharing of information;
- implement productivity improvements within legal practices;
- develop reports to analyse performance, productivity and to monitor the overall position of the practice; and
- provide continued support and confidence to the practice through training and consulting services as required.

Her management role has involved not only responsibility for the efficient running and integration of systems but also the need to pay close attention to the perceived future requirements of her clients to ensure they have the opportunity to take advantage of technological developments.

Kate has an in-depth knowledge of the legal profession and its unique workplace requirements. She speaks frequently on a number of information technology and practice related subjects for the Queensland Law Society and Australian Legal Practice Management Association (ALPMA).

Contributing Vendors

This review features the following vendors and related products:

Vendor	Product(s)
Lexis Nexis	Lexis Affinity Library
Sinch	Amicus Attorney
BHL	BHL Insight
Filepro	Filepro
LawMaster	LawMaster
Leap Legal Software	Leap Office
LegalEdge	LegalEdge
Open Practice	Open Practice
Lexis Nexis	PCLaw Plus

Other vendors were invited to participate, but chose to decline.

Checklist audience

This Checklist is intended for use only by Queensland Legal Practitioners contemplating the acquisition of a practice management system. It is not suitable for any other purpose nor should it be used by any other profession or business.

Scope of content

This Checklist provides information concerning the common functionality and features of legal practice management systems. This Checklist is not intended to be, nor is it, exhaustive or authoritative in the scope of its coverage. The Checklist should not be relied upon as professional advice or as addressing any particular individual's or legal practice's circumstances. Every attempt has been made to ensure the Checklist a comprehensive listing of major issues likely to be relevant and of interest to Queensland Legal Practitioners. There may, however, be other issues relevant to particular individuals or legal practices.

Many of the currently available practice management systems do not provide all of the functionality or features set out in this Checklist. Others provide additional functionality not listed here. Product vendors or independent advisors should be consulted with respect to the availability of specific functionality in any particular practice management system. Practitioners are encouraged to independently satisfy themselves as to the suitability to their particular practice of any particular practice management system.

The Queensland Law Society does not guarantee, and accepts no legal responsibility whatsoever arising from or connection to, the accuracy, reliability, currency, correctness or completeness of any material contained in the Checklist.

Users should exercise their own skill and care with respect to their use of the information contained in this publication.

Copies of this Checklist may be obtained in hard copy or by email from the Queensland Law Society.

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Table of Contents

Introduction: Where to start

The principles that apply are basically the same whether upgrading an existing system or computerising for the first time.

- Have a clear vision of the functionality you wish to achieve
- Develop a clear budget for equipment, implementation, data transfer, training
- Ensure that different systems integrate with one another – avoid "islands of technology"
- Develop an implementation plan
- Avoid bespoke software – stick to off-the-shelf

Most practitioners will find it more convenient to purchase legal practice management systems rather than acquire a discrete accounting system, a discrete trust accounting system, a time recording system and so on. In fact, implementing disparate systems is strongly discouraged as common information within each system, such as the client's contact details, is time consuming and difficult to maintain. Instead, good practice management systems use a single database as a central repository of information generated by the various modules of the product software. This enables law firms to store and manage all relevant information about their practices. These systems are highly sophisticated and offer extensive functionality. However, it is imperative that the practice management system produces and maintains accurate records.

In addition to providing management tools, a central advantage of implementing a practice management system includes the ability to share information captured by the practice management system with other applications. The practice management system stores information entered in its database into fields. These fields of information can be used in conjunction with other applications, for example, word processing. Firm precedents can be modified to include these fields then merged with the information in the practice management system's database to create matter specific documents. This eliminates the need to re-enter information already captured by the practice management system.

When considering any practice management system, it is important that the program should be intuitive and easy to use. Programs that are difficult to use may prove inefficient and may require external support and development.

a. Features of Legal Practice Management Systems

A practice management system offers the following main areas of functionality:

- client/entity management
- matter management
- accounting functions
  - trust accounting
  - office accounting
  - billing
  - disbursements and sundries
  - debt collection management
  - financial management
- productivity reporting
- practice management
  - time recording
  - diary
- safe custody management
- marketing

- office automation
  - document production
  - workflow
- document management
- Integration with other products and devices as well as other functionality.

After a shortlist of practice management systems has been made, it is essential that the firm's existing network (both hardware and software) is reviewed in line with all software requirements, not just the practice management system's requirements. The capability of hardware configurations is often dependent upon the number of users and the software applications being used concurrently.

The process of selecting an appropriate practice management system can be a time consuming and confusing experience. It is recommended that practices consider retaining an independent consultant to assist the law firm through the process of product selection. This will help to ensure that both the law firm and the prospective product vendors understand what functionality the law firm requires and whether that functionality is available within the budget constraints of the law firm and the capabilities of any product under consideration.

b. Where are you now and where are you going?

Before introducing any new product, it is important to document the current position of the firm and its plans for growth and diversity.

Current position

What is the current position of the firm?

- number of partners
- number of fee earners (including lawyers and paralegals)
- number of support staff
- location(s) of the firm
- areas of practice (the types of services the firm provides and their relative importance)
- current clients, their businesses and the types of services provided by them.

What is the planned growth for the firm (if any)?

What are the major reasons the firm wishes to implement a practice management system?

Current network

What is the current configuration of the firm's network (including hardware and software)?

- servers
- workstations
- operating systems
- hubs / switches / routers
- cabling
- backup facilities
- anti-virus
- internet access
- major software applications used
- remote access capabilities.

It may be advisable to have a complete audit of the existing network done prior to implementing any additional applications.

Future plans

The practice management system will need to accommodate future growth and diversity within the practice. When reviewing any practice management system, you need to keep the following in mind:

- the size you expect the practice to grow to
- the location of additional branch offices
- whether a firm merger is planned
- remote access requirements
- accounting requirements of any additional branch offices
- new areas of practice to be introduced to the firm
- any new and expanding client base.

c. Preparing the Budget

It is important to accept and understand that any significant technological installation will involve a major financial commitment and involve changes in current working practices.

Before purchasing a practice management system, a budget should be established taking the following into account:

- initial purchase price of the chosen practice management system
- purchase of new hardware and / or upgrades
- purchase of any additional software or software upgrades
- precedent development or precedent purchases
- implementation costs
- consulting costs
- training costs
- maintenance costs.

When establishing a budget, practitioners should bear in mind the issues pertaining to the current firm structure and the plans for growth and diversity.

d. The role of computer consultants

Using a good computer consultant can save a lot of professional time and money but you need to ensure the consultant is truly independent and not tied to a software or hardware vendor.

The first step is for the consultant to work with the lawyers to determine the practice needs. The lawyers must get involved at this stage.

e. Reflect and consider - Is there ever really a case for doing it all yourself?

We could just about answer this with a resolute "NO!" Why not, you say? After all, I know a bit about computers and my brother-in-law works for an engineering software company.

IT systems are just like advanced statistics. A little bit of knowledge is arguably more dangerous than no knowledge at all. People seek legal advice partly because lawyers are considered the appropriate experts, but also because lawyers can give a dispassionate view of the problem. As outsiders, they do not create all kinds of emotional baggage about defending their choices and proving themselves internally. That's why you should do the same with your IT investments. Engage an outsider. In addition, talk to people with legal practice experience. It can save your firm a huge amount of money.

Computer and systems consultants are no different from any other consultants: there are very good ones and very bad ones.

Define with the consultant the precise parameters of the assignment, and when payment is due. It is a good idea to tie at least part of the payment to some reasonably objective test of successful implementation. Make sure it is reduced to writing (at least in letter form).

f. Involve staff in your planning and decision

The implementation of any new practice management software (or perhaps an upgrade to an existing software) will affect all staff in one way or another. Your staff are your most valuable asset. Ensure that you involve them in the review process of potential products and the final decision. Remember they are the ones who will be using the implemented system. Your staff will possess skills and expertise within a variety of areas e.g. accounting skills and expertise that you may not possess. Draw on that knowledge to make the "right" decision. Their input will prove to be invaluable.

In doing so, you may also find a much greater acceptance and uptake of the system and less resistance to the changes.

g. Decision time

A number of decisions are involved. Ask firms of a comparable size to your practice about their network infrastructure; what software they use; how long have they had it; what is their degree of satisfaction with the installation, the training, the backup service; can it be upgraded or must it be replaced when its capacity is outgrown; and so on. Do not be pushed into buying a product solely on the recommendation of the salesperson.

As we have emphasised earlier, planning is essential. Set realistic targets (e.g. you will not train the authors to use the system overnight).

Questions to ask a vendor include:

- can the installation and work be managed to ensure timetables are met?
- what service response times can be achieved?
- can memory or storage be upgraded if the needs of the system have been underestimated?
- can the system be re-configured to change the number or type of peripherals if after installation the original setup of the system does not work as expected?
- can they supply people onsite to provide innovative fixes to problems?
- will they work through problems with the law firm staff?, and
- can they provide all the firm's training requirements?.

In relation to every one of the above questions, be sure to add the rider "And at what cost?".

Ask the vendor for information to help you assess what its commitment to your firm will be.

Make sure it is reduced to writing (at least in letter form).

When choosing a system ask the vendor to nominate two or three reference sites that you can visit to see the system in operation. Remember, with all things IT, it is not just a matter of what they should do, but their actual performance in situ – and this includes things like adequacy of the training, reliability of backup support for the installation, communication skills of the vendor, and so on.

Sometimes, IT users experience problems because they refuse to follow the recommended procedures, or simply have not been prepared to pay for the training required to utilise the system effectively. You will need to consider all these possibilities and take a balanced view.

h. Vendor support staff available

You should ask the vendor to identify the number of company staff who will be supporting your installation:

- in field support, including product introduction, installation and training
- in research and development, including major enhancements
- in ongoing maintenance including central support and minor changes (an accessible and responsive online Help Desk is essential).

The internet now provides opportunities for help desk services and training to be delivered online. Ask your vendor to demonstrate their abilities in this regard prior to any commitment.

i. Major product installations

For each major product, ask for a synopsis of product development to the current version, including date of first major customer installation, current number of sites, dates of major enhancements and plans for major improvements.

j. User groups

Ask for information about any vendor supported user groups for the products proposed. Responses to these questions will help determine which vendors are serious about the legal market and your installation.

k. The contract

Perhaps the most significant ingredient is the contract you enter into with the vendor. It is crucial that you buy a solution to a problem, not pieces of hardware and software. If your contract with the vendor is framed in terms of an order for hardware and software, then that is what you will receive. If the hardware and software do not overcome your problem, the vendor has no requirement to do anything further. If your contract is framed in terms of the problem you have, with the vendor stating that it will solve that problem, you not only use the vendor's expertise in providing a solution, you also have the vendor contracted to solving that problem.

The vendor should spell out exactly what staff training they will provide. However, remember, the more they provide, the more it will cost. But also recognise the only way to get full value from your IT investment is to have as many staff as possible conversant with all aspects of the new system.

Commitment also will be easier if the correct parties are included in the contract. When buying hardware and software, identify who is supplying what equipment and software. If hardware and software are provided from a number of different sources (often the case), make sure that you have either a large lead contractor (that is financially stable) enter into the contract with you, or alternatively, have all parties sign the same contract (as being jointly and severally liable).

If the hardware and software do not solve the problem, the vendor is still committed to providing hardware and software that will. If after installation your problem is not solved, it is easier to go back to the vendor and say, "I have a problem you contracted to solve - it is not solved. I require you to provide further resources at no cost to me to solve the problem," than it is to say "I have contracted to buy hardware and software from you, which you supplied, but it does not overcome the problem that I have". You need to ensure that all the documents that influenced your decision to purchase are included as an annexure to your contract. It is then easier when ensuring commitment to go back to those documents and say to the vendor "You promised in a letter or pamphlet that your equipment would do this, this and this and it was on that promise the purchase was made".

Do not let the vendor talk you into something you do not need.

l. Remember - At the same time, keep an open mind…

At some stage of proceedings, you are going to have to build a degree of trust in your supplier / advisers. There is a good chance that they will know about enhancements that you have never heard of, and these may actually make your practice better off. A good rule of thumb is: Has this person been constantly telling me what I need, or has he/she been asking me about what I think my needs are? If it is the latter, you probably are not facing a major risk of being sold things you do not need. Defining the legal parameters of your relationship is important – but so is establishment of this thing called trust. Only you can judge when (and if) it has been earned.

It is quite a common "out" when a problem occurs for one vendor to say - "not my problem - it's the hardware" (or vice versa). If a software vendor is providing you with a total solution, including the provision of hardware from a large hardware vendor, make sure the hardware vendor enters into the contract as a joint party. Thus, if on the installation it is found the system is under-configured or the operating system does not work, then the hardware vendor can be called in to solve the problem.

It also makes the hardware vendor aware of the configuration that the software vendor has proposed and whether the system has been under-configured. Under-configuring hardware is a method used by some software vendors to keep the initial cost of an installation down so that the tender is won. It means the system has to have new hardware added to it soon after the initial installation. This can add large and immediate costs to the law firm. Integrating the right hardware decisions with the right software ones is critical, and something not well understood by non-IT people. For example, each network operating system (a software decision) will come with a menu of recommended hardware choices that the software supports. Put more simply, if you stray from the recommended list, there is a really high chance that some aspects of your installation simply will not work. Buying IT equipment on an impulse basis because Harvey Norman, Myer, or whoever seems to be offering a great deal, may well be appropriate for home or recreational IT purchases, but it is no way to set up your office!

Commitment is not a one-way street. You and your staff must be prepared to co-operate with the vendor. Project management meetings and training sessions must be attended, and you must be prepared to pay the vendor for work done. This does not mean you pay for everything in advance, but there is no point in sending the supplier to the wall.

In summary ensure that the vendor is committed to the success of your computer installation. Early planning, a clear written statement of the benefits you are seeking, a well-constructed contract and co-operation with the vendor will go a long way to ensuring this. However, be prepared to pay for the best skills and services. Anyone can sell you a cheap hardware – only experienced computing professionals will make the whole system work as you envisaged.

Take a broad business-oriented view of your practice. Do not simply just focus on the needs of lawyers. But do not focus only on the needs of secretaries. Focus on information flows and processes, rather than specific people and pieces of equipment.

m. Implementation

Insist that the system or particular application is installed and successfully tested before you are obliged to pay.

Set a training schedule for all staff and other users. Remember your staff will not become experts overnight so allow them the opportunity to go back over their training to instil confidence. Ensure that the fast learners receive advanced training.

Do not forget to organise temporary typing or other support to cover the absences of your staff and to ensure that the real work of the office gets done while the training is taking place. Always have back-up operators amongst your own staff so train them early.

Choose the time for the implementation carefully - avoid busy periods. Ensure adequate onsite support is available for the 'go live' phase.

Computerised Trust Accounting Systems: legislative requirements

It was previously the practice of the Department of Justice and Attorney-General to assess computerised trust accounting systems with a view to approval of their use by solicitors. This practice was discontinued in 1994.

The Queensland Law Society does not assess computerised accounting systems. Sections 28 to 32 of the Legal Profession Regulation 2007 set out the requirements for a complying computerised trust accounting system. Sections 28 to 32 provide:-

"28 Application of ss 29–32

Sections 29 to 32 apply if a law practice keeps trust records, including records relating to controlled money, by means of a computerised accounting system.

29 Copies of trust records to be printed

(1) The law practice must print a paper copy of trust records as follows—

> *(a) trust account receipts and payments cash books are to be printed monthly as at the end of each named month, unless a copy of the books as at the end of the named month is kept in electronic form that is readable or reportable on demand;*
>
> *(b) reconciliation statements prepared under section 44 are to be printed as at the end of each named month;*
>
> *(c) lists of trust ledger accounts and their balances are to be printed monthly as at the end of each named month;*
>
> *(d) lists of controlled money accounts and their balances are to be printed monthly as at the end of each named month;*
>
> *(e) trust ledger accounts, the controlled money movement records and the trust transfer journal are to be printed before they are archived or deleted from the system;*
>
> *(f) trust ledger accounts and controlled money account details are to be printed on request by and provided to an investigator.*

(2) The trust records printed monthly as at the end of a named month under subsection (1)(a) to (d) must be printed within 15 working days after the end of the named month.

(3) The paper copies printed under subsection (1) are to be kept by the law practice, except if they are printed on request under that subsection. The electronic copy of the trust account cash books under subsection (1)(a) is to be kept by the law practice.

30 Chronological record of information to be made

(1) The law practice must keep a record, compiled in chronological sequence, of the creation, amendment or deletion of information in its computerised accounting system in relation to the following—

> *(a) client name;*

(b) client address;

(c) matter reference;

(d) matter description;

(e) ledger account number or other descriptor.

(2) The record is to be kept by the law practice.

31 Requirements regarding computer accounting systems

(1) The law practice must ensure its computerised accounting system is not capable of accepting, in relation to a trust ledger account, the entry of a transaction resulting in a debit balance to the account, unless a contemporaneous record of the transaction is made in a way that enables the production in a permanent form, on demand, of a separate chronological report of all occurrences of that kind.

(2) The law practice must ensure the system is not capable of deleting a trust ledger account unless—

(a) the balance of the account is zero and all outstanding cheques have been presented; and

(b) when the account is deleted, a copy of the account is kept in a permanent form.

(3) The law practice must ensure any entry in a record produced in a permanent form appears in chronological sequence.

(4) The law practice must ensure each page of each printed record is numbered sequentially or is printed in a way that no page can be extracted.

(5) The law practice must ensure its computerised accounting system is not capable of amending the particulars of a transaction already recorded otherwise than by a transaction separately recorded that makes the amendment.

(6) The law practice must ensure its computerised accounting system requires input in every field of a data entry screen intended to receive information required by this division to be included in trust records.

32 Back-ups

The law practice must ensure—

(a) a back-up copy of all records required by this division is made not less frequently than once each month; and

(b) each back-up copy is kept by the law practice; and

(c) a complete set of back-up copies is kept in a separate location so that any incident that may adversely affect the records would not also affect the back-up copy."

If you wish to discuss any of the above requirements, please contact the Queensland Law Society Trust Account Investigations Section on telephone number (07) 3842 5908.

Functionality Checklist

This functionality checklist should be considered a guide only to the available practice management solutions and the functionality offered. Practitioners are advised not to select a practice management solution for their practice based solely on this checklist. Instead, the checklist should be used to identify functionality considered necessary to improve efficiencies and to enable practitioners to better manage their practice.

Note: Due to time constraint of the project, it was not possible for the consultant to review all the items listed in the functionality checklist. Vendors have provided input to the checklist and have been given the opportunity to review the results at the completion of the review by the consultant. All vendors have confirmed that the checklists for their product(s) are accurate. However, product developments may have been implemented since the review process.

Be realistic about your requirements. If you select all the functionality identified in this checklist, you may effectively be deciding to purchase one of the more sophisticated, high-end market products, which usually involves much greater expense. Additionally, nominating functionality that you do not really require may mean that you may not be able to support the functionality internally with your existing or even your planned upgraded resources (which may include only a limited number of additional staff).

As no practice management system will be perfect for everyone, it may become an issue of "value for money" keeping in mind that some of the more sophisticated features may not be used often enough to justify the expenditure.

Once a potential solution has been identified, practitioners should contact the vendor(s) to arrange to comprehensive demonstration of the product(s).

Legend

◖ Half mark – Functionality is met in part

Consultant's assessment differs from vendor.

- Lexis Affinity Library solution includes Affinity (●) and Information Manager (I)
- Amicus Attorney solution includes Amicus Attorney (●) and Amicus Accounting (A)
- Leap Legal solution includes Leap Office (●), MYOB (M), Leap RapidPay (R), Leap Accounting (A) and Leap Documents (D)
- Open Practice solution includes OP (●), OPS (S) and OPD (D).
- PCLaw Plus solution includes PCLaw Plus (●) and LexisNexis Precedents (P)

Note: Comparto has declined to submit a functionality checklist for its practice management system.

Features	Amicus Attorney	BHL Insight	Filepro	Law Master	Leap Office	Legal Edge	Lexis Affinity Library	Open Practice	PC Law Plus
Client/Entities									

Features	Amicus Attorney	BHL Insight	Filepro	Law Master	Leap Office	Legal Edge	Lexis Affinity Library	Open Practice	PC Law Plus
1. Conflict checking and reporting (ie a report of possible conflict of interest search results which can be distributed or printed)	◖	◖	◖	●	●	◖	●	●	●
2. Multiple addresses and contact methods	●	●	●	●	●	●	●	●	◖
3. Capture of additional attributes	●	●	●	●	●	●	●	●	●
4. Data integrity functionality	●	●	●	●	●	●	●	●	●
5. Relationship / association linkage	●	●	●	●	●	●	●	●	
6. Direct emailing from practice management system	●	●	●	●	●	●	●		●
7. Auditing of changes to clients/entities	●	●	●	●	●	●	●	●	●
8. Experts register (ie facility to register specialists along with skills, region and other attributes that can be searched)	●	◖		●	●		●	◖	
9. Grouping of entities by category	●	●	●	●	●		●	●	
10. Recording of exposure limits against clients		●	●	●		●	●	●	
11. Credit checking (ie integrated Credit Check Searching)								S	
12. Capture of bank account details			●	●	●		●	●	
13. Capture of notes against a client/entity	●	●	●	●	●	●	●	●	●
14. Export of client/entity data	●	●	●	●	●	●	●	●	◖
15. Full search and filter capabilities	●	●	●	●	●	●	●	●	

Matters									
16. Reinstate closed matters within full ledger history	●	●	●	●	●	●	●	●	●
17. Record exposure limits for fees and disbursements with alerts		●	●	●	●	●	●	●	◖
18. Matter locking (ie locking, not closing, a matter to prevent further activity)				●	●		●	●	
19. Multiple clients on matter	●	●	●	●	●	●	●	●	◖
20. Contact/entity register on matter	●	●	●	●	●	●	●	●	●
21. View matters associated with selected contact/entity	●	●	●	●	●	●	●	●	●
22. Sub-matter capabilities (ie matters that are linked eg class actions)				●				●	●
23. Matter planning tool (ie a tool like MS Project that can plan the course/stages of a matter, resources to be used, timeframes and budgets)				●					◖
24. Critical dates register	◖	●		●	●		●	●	◖
25. User definable data fields for additional data capture	●	●	●	●	●		●	●	●
26. Full search and filter capabilities	●	●	●	●	●	●	●	●	◖
27. Registration and maintenance of secure/ private matters	●			●	●		●		◖

Features	Amicus Attorney	BHL Insight	Filepro	Law Master	Leap Office	Legal Edge	Lexis Affinity Library	Open Practice	PC Law Plus
Accounting Functions									
Trust Accounting									
28. Fully compliant with computerised trust accounting act and regulations		●	●	●	●	●	●	●	●
29. Full audit reporting		●	●	●	●	●	●	●	●
30. Controlled funds management		●	●	●	●	●	●	●	●
31. Law Society deposit		●	●	●	●	●	●	●	●
32. Protected trust facility		●	●	●	●		●	●	
33. Trust journals and reporting		●	●	●	●	●	●	●	●
34. Reconciliation of trust account		●	●	●	●	●	●	●	●
35. Clearance day calculation reliant of method of funds received		●	●	●	●	●	●	●	
36. Trust transfer and reporting facility	A	●	●	●	●	●	●	●	●
Office Accounting									
37. Accounts receivable facility	A	●	●	●	●	●	●	●	●
38. Accounts payable facility	A	●	●	●	● / M	●	●	●	●
39. Purchase ledger		●	●	●	● / M	●	●	●	●
40. EFT / BPay payment of creditors facility		●	●	◖	● / R	●	●	●	
41. Credit card payment method and surcharge calculation		◖		●	● / R	◖	●	●	
42. Online cheque requisitions and authorisation (ie authorised online before cheque processing)		◖	◖	●	A / M		●		◖
43. Multiple bank accounts management	A	●	●	●	A / M	●	●	●	●
44. Reconciliation of bank accounts and reporting	A	●	●	●	● / M	●	●	●	●
45. Automated electronic bank reconciliation facilities		●		●	●		●		◖
46. Multi-currency facility							●		
47. Payroll production				●	M	●			
Billing									
48. Billing Guides	A	●	●	●	●	●	●	●	●
49. Flexible methods of billing eg fixed fee / scale / itemised time etc		●	●	●	●	●	●	●	●
50. Variety of billing formats	A	●	●	●	●	●	●	●	●
51. Reprint bill at any time	A	●	●	●	●	●	●	●	●
52. Reprint of finalised bill in a different bill format		●	●	●	●	●	●	●	●

Features	Amicus Attorney	BHL Insight	Filepro	Law Master	Leap Office	Legal Edge	Lexis Affinity Library	Open Practice	PC Law Plus
53. Exportation of the bill to word processing	A	●	●	●	●	●	●	●	●
54. Fee write up/down allocation eg pro rata or specific value		●	●	●	●	◖	●	●	●
55. Consolidation of multiple matters into one bill				●	●		●		●
56. Saving of bill to document management system			●	●	●	●	●	●	●
57. Rounding of totals to nearest $				●			◖	●	
58. Reporting of bills raised during a defined period	A	●	●	●	●	●	●	●	●
Disbursements & Sundries									
59. Input of sundries by non-accounts staff		●	●	●	●	●	●	●	●
60. Grouping of sundries for billing purposes	A	●	●	●	●	●	●	●	●
61. Anticipated disbursements facility including reporting		●	●	●	●	●	●	●	●
62. Calculation of interest on disbursements	A	●		●	●		●	●	●
Debt Collection Management									
63. Debt collection management facility		●	●	●	●		●	●	◖
64. Application of credit terms	A	●	●	●	●		●	●	
65. Debt aging facility	A	●	●	●	●	●	●	●	●
66. Credit rating facility		●		●				●	
67. Generation of debt collection letters at predetermined times		●	●	●	●		●	●	
68. Interest calculation of overdue debts	A		●	●			●	●	●
Financial Management									
69. Predefined financial management reports eg P&L, Balance Sheet.	A	●	●	●	M	●	●	●	●
70. Customisable general ledger structure	A	●	●	●	M	●	●	●	●
71. Customisable financial management reports		●	●	●	A / M		●	●	◖
72. Automatic emailing of selective financial management reports		●		●		●	●	●	
73. GST compliant to cash or accrual basis including production of BAS		●	●	●	M	●	●	●	●
74. Branch accounting facilities		●	●	●	● / M		●	●	●
75. Multiple trading company facilities		●	●	●	A / M	●	●	●	●
76. Consolidated reporting on trading companies		●	●	●	A / M	●	●	●	●
77. Recurring charges payment facility			●	●	A / M		●	●	●

Features	Amicus Attorney	BHL Insight	Filepro	Law Master	Leap Office	Legal Edge	Lexis Affinity Library	Open Practice	PC Law Plus
78. Standing general ledger journal facility				●	A / M		●	●	●
79. Assignment of general ledger budgets	A	●	●	●	A / M		●	●	●
80. Asset register				●	A / M				
81. Asset depreciation schedules				●	A / M				
82. Export to Excel functionality		●	●	●	● / M	●	●	●	●
83. System audit of general ledger transaction vs transaction history		●	●	●	M	●	●	●	●
Productivity Reporting									
84. Key performance indicator reporting for firm, departments and personnel (KPIs)		●		●	A		●	●	●
85. Record budget against fee earner and reporting facilities		●	●	●	A		●	●	●
86. Decision making tools (eg Business Intelligence) including current status and future projects etc (ie a tool that will report, analysis and present information in a variety of formats to enable the firm to make decisions)				●	◖				
87. Dashboard reporting functionality		●		●	A / M		●	●	
88. Dynamic budget function		●		●	A / M			●	
89. Matter inactivity reporting	●	●	●	●	A	●	●	●	
Practice Management									
Time Recording									
90. Time recording reports	●	●	●	●	A	●	●	●	●
91. Timesheet entry	●	●	●	●	A	●	●	●	●
92. Clock/timer facility	●	●	●	●	A	◖	●	●	●
93. Spell check on time narrations	●	●	●	●	A	●	●	●	●
94. Stored keystrokes and play back	●	●		●	A		●		
Diary									
95. Diary facilities	●	●	●	●	D	●	●	●	●
96. Diary integration with Outlook calendar	●		●	●	D		●	●	●
Safe Custody Management									
97. Safe custody register	●	●	●	●	●		●	●	●
98. Check in/out facility	●	●	●	●	●		●	●	●

Features	Amicus Attorney	BHL Insight	Filepro	Law Master	Leap Office	Legal Edge	Lexis Affinity Library	Open Practice	PC Law Plus
99. Document production in relation to safe custody records (ie mail out facility eg ability to produce a letter to packet holders (clients) advising that their item is due for review)	●		●	●			●	●	
100. Safe custody reports (eg maturity / movements) (ie reports that show the total of packets held, the status or movements (like released / returned etc) of safe custody items etc)	●	●	●	●	◖		●	●	●
101. Security controls on safe custody activities (ie security that controls what users can and cannot do within safe custody)		●	●	●			●	●	●
102. Capture of electronic version of safe custody items	●	●		●	●		●	●	●

Marketing									
103. Event management and monitoring of individual marketing campaigns	◖	●		●			●	●	
104. Marketing budget vs costs by campaign	◖	●		●			●	●	
105. Marketing media analysis (ie ability to analysis where matters are coming from, the marketing media which produces the best results etc)	●	●	●	●	◖	●	●	●	◖
106. Client profiling	●	●	●	●	●		●	●	●
107. Referral Register	●	●	●	●	●		●	●	●
108. Capture of marketing communications	◖	●	●	●	●		●	●	
109. Bulk mail-out functionality	●	●	●	●	●		●	●	◖

Office Automation									
Document Production									
110. Precedent library including searching facilities	●	●	●	●	●		●	D	●
111. Dictation guides for precedents			●	●			●	D	
112. "Smart" precedent development	●	●	●	●	●	●	●	D	●
113. Variable insertion tool when developing precedents	●	●	●	●	●	●	●	D	●
114. Automated document production	●	●	●	●	●	●	●	D	●
115. Multiple party document production	●	●		●	●	◖	●		
116. Prompt user for document variable input (ie the user is prompted for data from the database required to satisfy the document)		●		●	#		●	D	P
117. Capture of variable data into database	●	●	●	●	●	●	●	D	●
118. Variety of field types for data fields	●	●		●	●	●	●	D	●
119. Assignment of mandatory data fields (ie data fields created by a user that can be assigned as mandatory)	●	●		●	#	◖	●	D	

Features	Amicus Attorney	BHL Insight	Filepro	Law Master	Leap Office	Legal Edge	Lexis Affinity Library	Open Practice	PC Law Plus
120. Email production using client/entity/ matter details	●	◖	●	●	●		●	D	
121. Preview of precedent prior to generation	●		●	●	●		I	D	P
122. Identification of parties associated with precedent (ie identifies parties associated with or required for the precedent eg letter to mediator confirming mediation may involve details of other side solicitors and Counsel)		●			#				
123. Help text on precedent	●		●	●	●		●		P

Workflow									
124. Dynamic workflow functionality (ie workflow that changes as the course of the matter changes including tasks being added or removed as the matter requires)		●		●	#		●	●	
125. Establishment of team structures	●	●	●	●	●		●	●	
126. Automatic assignment of tasks to team members	◖	●	●	●	●		●	●	
127. Re-allocation of tasks when teams change	◖	●		●	●		●	●	
128. Scheduling of task in accordance with timeframes	●	●	●	●	●	●	●	●	●
129. Completion of task via To Do list or on matter	●	●	●	●	●	◖	●	●	●
130. Audit trail of tasks (ie audit of changes made to tasks by users including such changes as date, reallocation and details of the change)		●		●		●		●	●
131. Escalation of tasks				●	●			●	
132. Alerts on overdue tasks	●	●		●	●	●	●	●	●
133. Automatic trigger of time recording at commencement of task	◖		●	●					◖
134. Generation of time entry at task completion	●	●	●	●			●		●
135. Access to generated document(s) via task			●					●	
136. Automated multiple document production on task		●		●			●	●	
137. Ad hoc task creation including document production	●	◖	●	●	●		●	●	
138. Automatic email creation/sending based on events and/or data		◖		●	●		●	●	
139. Background data capture based on events				●			●		
140. Library of predefined tasks (ie a list of tasks that can be added to the workflow as the matter requires)	●	●	●	●	#		●	●	●
141. Task editing	●	●	●	●	●	●	●	●	●
142. Reallocation of tasks to other team members	●	●	●	●	●	●	●	●	●

Features	Amicus Attorney	BHL Insight	Filepro	Law Master	Leap Office	Legal Edge	Lexis Affinity Library	Open Practice	PC Law Plus
143. Allocation of Notes against a task	●	●			●		●	●	●
144. Re-calculation of task dates	●	●		●	●	●	●	●	●
145. Flagging of tasks to be web reportable				●	◖		●	●	
146. Visual representation of each workflow		●			●		●		
147. Application of conditions on tasks (ie ability to control whether a task comes into a workflow based on criteria (conditions) captured earlier in the matter)		●		●			◖		
148. Workflow development for secure/private matters	●			●	●		●		
149. User definable guidance/help on tasks (ie ability to include help text on tasks to assist users)		●		●			●	●	
Document Management									
150. Document searching using a variety of criteria	●	●	●	●	●		●	D	●
151. Full text searching	●	●		●	●			D	◖
152. Categorisation and re-organisation of documents (ie ability to be able to view documents by different categories or orders eg grouped by type by author)	●	●	●	●		◖	●	D	●
153. Previewing of material using viewers				●	●			D	
154. Version control			●	●	●	◖	I	D	
155. Check in/out facility	●		●	●	●	●		D	
156. Protection of final documents (ie ability to protect the final version of documents from future editing or changes)	●		●	●	#			D	
157. PDF conversion		●	●	●	●		I	D	
158. Capture of third party material	●	●	●	●	●	●	●	D	●
159. Flagging of documents for brief production			●	●			●		
160. Flagging of documents for external access				●	●		●	D	
161. Protection of material for private/secure matters	●	●	●	●	●		●	D	
162. User definable profiling screen				●				D	
Additional functionality									
163. Customisable screen layouts		◖		●	●		●	●	●
164. Soft labels on user definable fields	●	●	●	●	●		●	●	●
165. Security controls on database functionality	●	●	●	●	●	●	●	●	●
166. Cloud computing eg self-service Internet infrastructure (ie full access to the practice management system via an internet browser only)				●		●	●		

Features	Amicus Attorney	BHL Insight	Filepro	Law Master	Leap Office	Legal Edge	Lexis Affinity Library	Open Practice	PC Law Plus
167. Hosted (ASP) model	●	●		●	●		●	●	
168. HR facilities		◖		●					
169. Importation of clients and matters (ie ability to create new clients and matters from importing a list of clients and matters from another list eg a spreadsheet)	●	●	●	●			●	●	●
170. New enquiry interface (including web enquiries) (eg interface screen to quickly and easily create a client and matter based on minimal information)	◖			●			●	●	
171. Configurable data warehouse				●					
172. Data dictionary for end users		◖		●		●	●	●	●
173. Controlled and customisable external access		●	●	●	●	●	●	●	
174. Knowledge management / Library facility (ie a facility where reference material, seminar papers and other library resources can be catalogued and searched etc)	●			●			●		
175. Accessible via PDA device	●	●		●		●		●	●
176. Online help	●			●	●	◖		●	●
177. Context sensitive help				●	●				●

Integration with other applications and devices									
178. Cost recovery system eg Softlog / Billback		●	●	●	●		●	●	●
179. TAPI devices	●	●		●					
180. SMS technology				●		●			
181. Third party precedent packages	●	●	●	●			●	●	
182. PDF creator		●	●	●	●		●	●	●
183. Document management system eg iManage	●	●					●	●	
184. Microsoft Office including Exchange/ Outlook	●	●	●	●	●		●	●	●
185. Integrated online search facilities (eg Citec) and automatic capture of results and charges					●	●	●	●	
186. Voice recognition software	●		●					●	●
187. Report writing application	●	●	●	●			●	●	●
188. Document automation tool eg HotDocs	●	●		●			●	●	●
189. Business analysis program				●					

Vendor profiles

The following profiles have been submitted by vendors as their chance to promote their products. Whilst the format and questions for these profiles were designed by the consultant, the responses have not been reviewed by the consultant.

Readers will note that some vendors have provided more detailed profiles and responses than others.

Some vendors' decisions to withhold certain information have been made for very good reasons. For example, pricing can often not be determined until a product vendor is made aware of the number of proposed users or fee earners or how many modules of its product a practitioner intends to take under licence. Nevertheless, these omissions are regrettable and have meant that there are unavoidable blanks under subject headings in some of the profiles of particular products. In such situations, members should therefore seek further information

n. Amicus Attorney

CORPORATE PROFILE								
Company Name:	Sinch Software Pty Ltd							
Address:	14 Unwin Street Canterbury NSW 2193							
Contact:	Simon Lewis							
Telephone:	02-9718 4076							
Email:	simon@sinch.com.au							
Website:	www.sinch.com.au							
Office Locations:	Sydney							
Number of Staff:	5							
Number of users by Location:	**QLD**	**NSW**	**ACT**	**VIC**	**TAS**	**SA**	**WA**	**NT**
	100	100	10	50	0	20	20	0
Number of users by firm size:	**1-5**	**6-20**	**21-40**	**41-75**	**75-100**	**100+**		
	120,000	80,000	50,000	15,000	5,000	1,000		

Company Profile:

Sinch is the Australian distributor of Amicus Attorney, a product published by Gavel & Gown of Toronto, Canada. Our focus is on helping lawyers be a better lawyer, whether they be in a law firm, or in-house. Our people have been doing this for 25 years.

We continue to be a world leader in the innovative use of IT for lawyers themselves, as opposed to just support or accounting staff. We help our clients thrive in challenging times by applying methods and tools beyond Amicus with training and seminars to build a special community of IT-enabled lawyers.

PRODUCT OVERVIEW	
Produce Name:	**Amicus Attorney**

Product Profile:

Amicus products are designed to make law firms more efficient and profitable, while providing legal professionals with greater peace of mind. We want you to do more, bill more and go home early! The Amicus product line includes: Premium Edition; Small Firm Edition; Amicus Accounting; Amicus Mobile - add-on to Premium Edition that runs Amicus Attorney in real-time on a variety of Smartphones and mobile devices

Licensing Arrangements and Costs (including Maintenance):

Amicus is like shrink-wrapped software, and does not lock you into annual fees for maintenance. One-off license fee: Premium: $995 per user; Small Firm: $795 per user; Accounting $495 per user; Mobile $995 for the server & $195 per user. Optional upgrades are at discounted price thereby giving you the control of deciding if the upgrade offer is worthwhile.

Application Installation Details:

Depends on product and services required. Premium Edition requires an Amicus version of MS SQL 2008, which is included with the price of Amicus. The Small Firm Edition does not use SQL and so requires less powerful hardware.

Implementation Procedures and Associated Costs:

Would normally recommend at least 1 day for basic data conversion of clients, matters and documents. 1 day for installation and customisation, and 1 day for training spread over a few short, digestible sessions. That would normally be $980 per day.

Summary of Training and Support Options:

Training of at least one day is recommended, even though Amicus has the reputation of being the world's easiest practice management system. In addition to a 600+ page User Manual, and a short Getting Started Manual, we provide a specially written training manual to step you through the breadth of features, and provide tips on the way.

Support is $295 for the first user, and $95 per each additional user per year.

Data Migration Options:

Migration of basic contact, matter and document information can normally be accomplished in a day or two. Sources of data might be Outlook and existing accounting system. Full data migration from a fully utilised Practice Management System can be an expensive exercise, and might be hard to justify in small firms as some systems make it very difficult for you to extract your data.

Hardware Requirements:

Server	Workstation
Premium Edition: 2 GHz+ with 4 GB Ram Small Firm Edition: 2 GHz Pentium 4 with 1 GB Ram	1 GHz+ with 2 GB Ram 1 GHz+ with 2 GB Ram

Software Requirements:

Operating System		Database
Server	Workstation	
Premium: Win Server or SBS 2008/2003 Small Firm: XP Pro or better	XP or later XP or later	MS SQL 2008 Nil – built in

o. BHL Insight

CORPORATE PROFILE								
Company Name:	BHL Software Pty Ltd							
Address:	Level 1, 645 Ann Street, Fortitude Valley 4006							
Contact:	Christopher Eddison-Cogan							
Telephone:	1300 132 385							
Email:	cmec@bhl.com.au							
Website:	www.bhl.com.au							
Office Locations:	Brisbane, Sydney, Melbourne							
Number of Staff:	8 (4 developers, 2 Training, 1 Sales, 1 Admin)							
Number of users by Location:	**QLD**	**NSW**	**ACT**	**VIC**	**TAS**	**SA**	**WA**	**NT**
	Yes	Yes	No	Yes	No	Yes	Yes	No
Number of users by firm size:	**1-5**	**6-20**	**21-40**	**41-75**	**75-100**	**100+**		
	No	Few	Yes	Yes	Yes	Yes		

Company Profile:

BHL has been developing and supporting software for Australasian law firms for more than 25 years. Insight is a completely new product, developed in house by the same team since 2003. This combination of stability and flexibility delivers increased productivity, improved management information and higher per-partner profitability.

We have successfully replaced competing systems in Australasian law firms with from 5 to 400 staff. The advantage to clients of Australian support is that the software reflects Australian requirements and is readily modifiable at short notice and low cost to suit clients' own practices.

PRODUCT OVERVIEW	
Produce Name:	**BHL Insight**

Product Profile:

BHL Insight is a complete and integrated legal practice management system designed for firms with from 20 to 400 users. Developed in collaboration with clients over the last decade, it may be installed with a focus on one or more component areas, including but not limited to fee recording and billing, trust and general accounting, workflow and document assembly, marketing, fee earner performance, branch and department performance, collections management, matter and time management. BHL Insight may be configured to suit each individual user so that despite its breadth of functionality the system remains easy to install and to use.

Licensing Arrangements and Costs (including Maintenance):

Licensing is based on the traditional per server, per user and per component approach, with maintenance calculated at 20% per annum. Typically, licence fees are between $1000 and $2,000 per user. If clients request other forms of licensing, for example SaaS or "Cloud Computing" then we are open to other approaches. Our goal is to provide clients with enhanced productivity and profitability on a commercial and competitive basis.

Application Installation Details:

Available on application. (Depends on firm size and requirements).

Implementation Procedures and Associated Costs:

Available on application. (Depends on firm size and requirements). We work with a number of consulting firms and individuals, usually charging on an hourly or daily basis. Our own rates are between $140 and $240 per hour.

Summary of Training and Support Options:

Available on application. (Depends on firm size and requirements). We work with a number of consulting firms and individuals, usually on an hourly basis. Our own rates are between $140 and $240 per hour.

Data Migration Options:

Full or partial conversions. We have converted sites from New Locus, BHL E, Keystone, Perfect Balance and Leap.

Hardware Requirements:

Server	Workstation
Available on application (Depends on firm size and requirements)	

Software Requirements:

Operating System		Database
Server	Workstation	
Windows, Unix or Linux	Windows XP and above, Citrix and Terminal Services on PCs or Apple Mac	Oracle, SQL Server on request

p. Comparto

CORPORATE PROFILE								
Company Name:	Comparto Pty Ltd							
Address:	Unit 4 First Floor Portal Office Park West 2994 Logan Road UNDERWOOD QLD 4119							
Contact:	Denise Allen							
Telephone:	(07) 3423 3402							
Email:	admin@comparto.com.au							
Website:	www.comparto.com.au							
Office Locations:	1							
Number of Staff:	7							
Number of users by Location:	**QLD**	**NSW**	**ACT**	**VIC**	**TAS**	**SA**	**WA**	**NT**
	106	4						
Number of users by firm size:	**1-5**	**6-20**	**21-40**	**41-75**	**75-100**	**100+**		
	16	74	15	4	0	1		

Company Profile:

Comparto Pty Ltd was established in 1977 and installed their first legal practice in 1983.

Comparto Pty Ltd provides: -

- Practice software for legal practices
- Practice software for accounting practices
- Networks
- Word processing
- Training
- Support

PRODUCT OVERVIEW	
Produce Name:	**Comparto Practice Management**

Product Profile:

The following software is developed and marketed by Comparto Pty Ltd:-

- Practice Management/Creditors/Payroll
- Softlog disbursements interface
- Mortgage Accounting
- Word Processing Interface
- Document Management System

Licensing Arrangements and Costs (including Maintenance):

Licence to use based on number of installed workstations that will access the software. Costs by quotation.

Application Installation Details:

Application software is installed on the server with only a shortcut on each workstation. Initial disk space of 30Mb is required, increasing to 200Mb – 300Mb required after one year depending on size of practice.

Implementation Procedures and Associated Costs:

A review of the practice and network is performed by Comparto at no cost.
Software installation is performed by Comparto and the cost is included in the price of the software.

Summary of Training and Support Options:

Training is available either at our office or on-site.
Costs by quotation.

Data Migration Options:

Open Practice	Law Ledger
Leap	PC-Law
Locus	Perfect Balance
Law Master	

Hardware Requirements:

Server	Workstation
Microsoft Based Server	Microsoft Based Workstation with XP/Vista/ Windows7

Software Requirements:

Operating System		Database
Server	Workstation	
Microsoft Windows 2000/2003/2008	Windows XP Professional Windows Vista Business Windows 7 Professional	Proprietary Database

q. Filepro

CORPORATE PROFILE								
Company Name:	Filepro Pty Ltd							
Address:	5A 18 Albert Road South Melbourne VIC 3205							
Contact:	David Keeler							
Telephone:	0419 902 624							
Email:	david@filepro.com.au							
Website:	www.filepro.com.au							
Office Locations:	WA, QLD (x2), TAS, SA							
Number of Staff:								
Number of users by Location:	**QLD**	**NSW**	**ACT**	**VIC**	**TAS**	**SA**	**WA**	**NT**
	52	2		48	8	2	180	0
Number of users by firm size:	**1-5**	**6-20**	**21-40**	**41-75**	**75-100**	**100+**		
	60	170	40	20	3			

Company Profile:

Filepro Pty Ltd is a private Australian company. Based initially in WA, company management has recently relocated to Melbourne. Developing, distributing and supporting solutions only for the legal profession for 20 years, Filepro is the 4th generation of legal practice management software.

Filepro enjoys a 60% penetration into WA legal firms who utilise specialised legal practice management software. The company recently moved into the eastern states market with a company philosophy of providing a simple, friendly and lower cost option in a single platform solution, with local representation.

The board and management of Filepro Pty Ltd are committed to the ongoing development and enhancement of the product based on user input and by staying abreast of developments in technology.

PRODUCT OVERVIEW	
Produce Name:	**Filepro**

Product Profile:

Filepro is a single software solution incorporating: Document Assembly and Document Management, Cost Recovery, Time Billing and Trust and General Accounting, Electronic Filing and functional connectivity to the Microsoft Office suite, including email capture, diary and tasks.

Visually representing the file clients find the software intuitive and friendly to use, a single software solution ensures integrity and reduces down time and connectivity issues with 3rd party applications. Continuing to develop the software Filepro has released 6 updates in the last 12 months with over 80 new features. All users enjoy the updates at no extra cost.

Licensing Arrangements and Costs (including Maintenance):

Filepro has a consumable pricing model. Users purchase consumable matters/files for a one off cost of approximately $10.00 plus GST depending on annual consumption. There is no capital cost or annual licensing fees or per user registration fees.

Document sets such for Family Law, Conveyance etc are available from the local office or licensed agent. After initial data migration, training and installation the ongoing cost is the purchase of the file that can be recovered from the client as an outlay. All users enjoy regular updates to the software at no extra cost.

Application Installation Details:

Filepro resides on (a) server(s), with a thin workstation install, all product updates are processed at the server level only.

Implementation Procedures and Associated Costs:

Implementation includes:

- Installation of Server and workstations, Email Add-In and user logins and security;
- Training of all staff in basic use and familiarity, document production, time recording and billing; Selected staff in precedent creation and management; Selected staff in Bookkeeping and Accounting.
- Data Migration and reconciliation.
- Onsite staff for the transitional period from training to the live environment.

Typically a 40 user firms is fully implemented in an 8 working day period causing minimum disruption to the practice.

Summary of Training and Support Options:

Fully qualified training staff and/or Licensed Agents conduct initial training and implementation.
All clients have access to online support, at the workstation level.
Product warranty and technical support is available online from the development office.
Ongoing user training and support is available from local staff or Licensed Agents.
Response time to support queries is typically immediate and generally within the hour.

Data Migration Options:

Filepro offers data migration from a number of products, including clients, matters, WIP, Disbursements, Debtors, Trust, Bank Reconciliations, Trial Balance and historical documents.

Hardware Requirements:

Server	Workstation
Minimum - Zeon 3065 Processor 2 Gb available RAM. By review depending on users and other applications such as Exchange Server	Minimum - Intel Pentium IV or compatible, 2.4 gigahertz (GHz) or higher processor

Software Requirements:

Operating System		Database
Server	Workstation	
SQL Server 2000 or greater	Windows XP Pro or greater	Microsoft SQL

r. LawMaster

CORPORATE PROFILE								
Company Name:	LawMaster Pty Ltd							
Address:	12 Ballinger Crescent, Buderim, QLD, 4556							
Contact:	Robert Laird							
Telephone:	0414 298 750							
Email:	rlaird@lawmaster.com.au							
Website:	www.lawmaster.com.au							
Office Locations:	Sunshine Coast, Sydney, Melbourne, Perth.							
Number of Staff:	20							
Number of users by Location:	**QLD**	**NSW**	**ACT**	**VIC**	**TAS**	**SA**	**WA**	**NT**
	981	219	50	320	10	492	111	0
Number of users by firm size:	**1-5**	**6-20**	**21-40**	**41-75**	**75-100**	**100+**		
	9	19	9	8	0	5		

Company Profile:

LawMaster is 100% Australian Company, based on the Sunshine Coast with staff in Sydney, Melbourne & Perth. LawMaster has been operating for 22 Years providing software solutions for the legal profession only. LawMaster's largest client is approaching 400 users across 30 locations, with the smallest being sole practitioners using the LawMaster hosted service LawMaster "On Demand". LawMaster is a conservative company that has developed and continues to foster a friendly company culture, with a flexible attitude able to satisfy the requirements of the most demanding customer requirements.

PRODUCT OVERVIEW	
Produce Name:	**LawMaster**

Product Profile:

LawMaster is a fully integrated solution for Australian law firms covering 21 solution areas and encompassing 22 years of Research and Development. Based on the most up-to-date and complete Microsoft Software architecture, and fully integrating with Microsoft Office, LawMaster is a software platform capable of enabling innovation and change in modern fast moving law firms, as well as providing solid and reliable base for established firms. Because of its depth, flexibility, and powerful customisation features, LawMaster is suitable for firms of all sizes and areas of law.

Licensing Arrangements and Costs (including Maintenance):

LawMaster has the following 3 pricing options:

- Hosted Solution
- Variable Fee Solution pricing
- Rented Solution

For detailed pricing options, contact LawMaster.

Application Installation Details:

Installation of the LawMaster application is included in the implementation plan.

Implementation Procedures and Associated Costs:

LawMaster Implementation Services are managed by highly experienced staff, and implementation plans are built based on specific customer requirements and resource availability. Contact LawMaster for pricing.

Summary of Training and Support Options:

LawMaster Training: Comprehensive Structured Training Options by Qualified Instructors. LawMaster Support: Standard Service Level Support with customised support options available. Full self-server portal for request logging.

Data Migration Options:

LawMaster Data/Document/Workflow migration from other systems to LawMaster is available.

Hardware Requirements:

Server	Workstation
Contact LawMaster for details	Contact LawMaster for details

Software Requirements:

Operating System		Database
Server	Workstation	
Windows 2003 or later	Windows XP SP3 or later	MS SQL Svr included

s. Leap Office

CORPORATE PROFILE								
Company Name:	LEAP Legal Software Pty Ltd							
Address:	Level 8, 189 Kent Street Sydney NSW							
Contact:	Ramsey Cabbani – National Sales Manager							
Telephone:	0448403041							
Email:	ramsey.cabbani@leap.com.au							
Website:	www.leap.com.au							
Office Locations:	Sydney, Brisbane, Melbourne, Adelaide, Perth, Singapore							
Number of Staff:	157							
Number of users by Location:	**QLD**	**NSW**	**ACT**	**VIC**	**TAS**	**SA**	**WA**	**NT**
	2,560	6,296	183	2,141	106	224	110	73
Number of users by firm size:	**1-5**	**6-20**	**21-40**	**41-75**	**75-100**	**100+**		
	2100	800	60					

Company Profile:

LEAP Legal Software provides software, content and online solutions exclusively to small law firms with 1 – 25 people. This special focus allows us to ensure that our solutions are relevant, effective and affordable for every small law firm. Our clients report that our strength is the high level of integration we provide between typical law firm applications. LEAP Office is a single integrated solution that combines (incorporates) all communication, form and precedent management, practice guidance, document and legal accounting functions in a single product, together with a Google optimised website. LEAP Office also integrates seamlessly with Microsoft Outlook, Microsoft Word and Microsoft Excel and MYOB for the General Ledger, BAS and payroll. LEAP has a robust management team and is committed to innovation with a R&D budget that exceeds $3 million per year. We provide a unique Money Back Guarantee to new purchasers to back up our software. Our software is supported by our Australian Helpdesk Team and industry leading online resources.

PRODUCT OVERVIEW	
Produce Name:	**LEAP Office**

Product Profile:

LEAP Office is an integrated solution that incorporates six components:

- LEAP Documents
- LEAP Accounting
- LEAP Searching
- LEAP Website
- Smokeball Forms
- Step-by-Step Legal Practice Guides

Licensing Arrangements and Costs (including Maintenance):

$150 per user per month for LEAP Office which includes:

- Licence Fees
- Unlimited telephone support
- Updates to automated legal forms, precedents and Step-by-Step Legal Practice Guides
- Version Upgrades to LEAP Documents and LEAP Accounting
- Access to online resources including free training Webinars, online Knowledge Base and the LEAP Wiki.

Application Installation Details:

Clients are required to confirm before installation date that their hardware, operating system, telecommunications, Microsoft Office and MYOB software complies with the LEAP System Requirements. Initial installation is performed by the LEAP Consultant onsite. Version upgrades are downloaded from the LEAP Client Space and are installed by the client.

Updates to automated legal forms and precedents are performed online using the Precedent Management System. There is no down-time.

Implementation Procedures and Associated Costs:

Once the Order is accepted the client is provided with immediate access to all online resources including legal forms, precedents, Step-by-Step Guides and LEAP Website. Software is installed in phases to minimise disruption. LEAP Documents is installed first, followed by LEAP Accounting about 2-3 weeks later. LEAP Office installation for:

- 1-4 users will take 2 days to install and train
- – 12 users will take 4 days to install and train
- 13 users and more will depend on the nature of the firm and their requirements.

Consulting Rates are currently $1750 (plus GST) per day.

Summary of Training and Support Options:

Initial training is delivered at the time of installation. Additional training is provided via free online Webinars, access to the LEAP Wiki. Online and onsite training is provided by the LEAP Consulting team including monthly classroom instructions at standard consulting rates.

Support is provided by the National HelpDesk through the Client Space, National HelpDesk Portal, the Knowledge Base and the LEAP Wiki. The HelpDesk operates from 8.30 – 5.30 AEST. Calls may be logged online 24x7 and suggested resolutions are given based on keywords entered in the logs.

Data Migration Options:

We perform Electronic Data Migrations from all of the major legacy legal accounting systems including Perfect Balance, Open Practice, Locus (old), Lexis Affinity, BHL (C) and KG2000. There are three types of Conversion. FreshStart (Clients and Matters- names and addresses only) QuickStart (Clients and Matters - names, addresses and safe custody) and Transactions (Clients and Matters - names, addresses, safe custody and matter financial transactions). Transactions .

Hardware Requirements:

Server	Workstation
PC with minimum 2GB RAM and 1.8 Ghz CPU for 1-5 users PC with minimum 3 GB RAM and 1.8 Ghz CPU for 6 15 users PC with minimum 4 GB RAM and 1.8 Ghz CPU for 15 - 25 users	PC with minimum 2GB RAM and 1.8 Ghz CPU

Software Requirements:

Operating System		**Database**
Server	Workstation	
Small Business Server 2003 Windows XP Professional	Windows 7 Professional & Ultimate Windows Vista Ultimate, Business & enterprise Windows XP Professional	Supplied with software

t. LegalEdge

CORPORATE PROFILE								
Company Name:	CentraLegal Pty Ltd T/as LegalEdge							
Address:	PO Box 239 Wickham NSW 2293							
Contact:	Brendon Sidebottom, Doug Boyd							
Telephone:	02 4323 1394							
Email:	sales@legaledge.com.au							
Website:	www.legaledge.com.au							
Office Locations:	Sydney, Newcastle NSW							
Number of Staff:	4							
Number of users by Location:	**QLD**	**NSW**	**ACT**	**VIC**	**TAS**	**SA**	**WA**	**NT**
	0	25						
Number of users by firm size:	**1-5**	**6-20**	**21-40**	**41-75**	**75-100**	**100+**		
	9	16						

Company Profile:

CentraLegal Pty Ltd t/as LegalEdge was formed by Doug Boyd and Brendon Sidebottom in 2007. Doug has more than 10 years experience building and designing billing systems for Vodafone Optus and Qantas. Brendon has 15 years experience in both systems accounting and legal practice management roles. CentraLegal also has network engineers and practice managers/accountants on staff to perform business services or compliance reporting for clients. The firm is represented in Brisbane by Kelly Mills and Law Support Australia. CentraLegal t/as LegalEdge exists to service sole practitioner to 20 person firms. LegalEdge is a hosted cloud software solution offered as a monthly subscription. The affordability and flexibility of the on-line service makes it ideal for dynamic law professionals who are out of the office but not out of touch.

PRODUCT OVERVIEW	
Produce Name:	**LegalEdge**

Product Profile:

Cloud based Matter and Practice Management, Document generation from precedent documents. Integrated searching. All matter documents and emails are stored on the cloud server for instant access from anywhere in the world. Trust and Office accounting is built in - includes payroll with online timesheets. Time and disbursement capture, flexible billing, reporting.

Licensing Arrangements and Costs (including Maintenance):

Monthly subscription $99 per user per month

Application Installation Details:

No install required. Runs in a web browser. Microsoft Word and Excel are required to edit documents.

Implementation Procedures and Associated Costs:

Nil

Summary of Training and Support Options:

Online training (videos) and How To documents. Online support is included.

Data Migration Options:

Completed to date: MYOB, LEAP, BHL, CLO

Hardware Requirements:

Server	Workstation
Nil	Broadband

Software Requirements:

Operating System		Database
Server	Workstation	
N/R	Windows XP and later	N/R

u. Lexis Affinity Library

CORPORATE PROFILE		
Company Name:	LexisNexis (Reed Business Information Pty. Ltd. Trading as LexisNexis)	
Address:	Tower 2, 475-495 Victoria Ave Chatswood 2067	
Contact:	Customer Relations	
Telephone:	1800 772 772	
Email:	customer.relations@lexisnexis.com.au	
Website:	www.lexisnexis.com.au	
Office Locations:	In Australia: Sydney, Melbourne, Brisbane, Adelaide, Canberra and Perth and International Offices	
Number of Staff:	13,000 people globally	

Number of users by Location:	**QLD**	**NSW**	**ACT**	**VIC**	**TAS**	**SA**	**WA**	**NT**

Number of users by firm size:	**1-5**	**6-20**	**21-40**	**41-75**	**75-100**	**100+**

Company Profile:

LexisNexis is a world leading provider of content-enabled workflow solutions. Our innovative solutions focus on the needs of the legal industry to help your business succeed by improving productivity, increasing profitability and stimulating growth. Current solutions include online and print legal, regulatory, news and business products and services, tools and customised web applications for law librarians.

Our valued research solutions are coupled with practice management tools to provide a unique offering to help our clients win.

PRODUCT OVERVIEW	
Produce Name:	**Lexis Affinity Library**

Product Profile:

Lexis Affinity Library is a complete, end-to-end business system, with automated system checking and integration across all key office functions. Lexis Affinity Library is developed using tools that are proven and reliable, to provide the basis for a single software application and database solution.

This streamlined system integrates everyday functions such as document production, marketing, email management, time recording, workflow and accounting, to allow your firm to map case flows and administrative processes into workflow processes.

Licensing Arrangements and Costs (including Maintenance):

Lexis Affinity Library is sold on a subscription model. The model is determined based on the number of fee earners at the client site.

Application Installation Details:

The Oracle Database is installed on the server and then the software is installed on the client workstation using an MSI.
Please request a copy of the Operating System Configuration Requirements from LexisNexis for current specifications.

Implementation Procedures and Associated Costs:

LexisNexis has developed a service approach that is designed to ensure an intrinsic link between client requirements and LexisNexis' service delivery. LexisNexis partners with its clients, to develop a structured planning and review process that reflects the firm's culture, business requirements and resources.

Implementation costs vary dependent on the needs of the firm.

Summary of Training and Support Options:

LexisNexis provides LexisCare a comprehensive support package that is provided as part of a clients subscription to Lexis Affinity Library. LexisCare entitles clients with access to the helpline team, regular software updates and upgrades, preferential professional service rates and access to a user community. LexisNexis offers several training options dependent on client needs. Training options range from basic accounting training to advance scripting and workflow training. Training can either be delivered onsite or in a classroom environment.

Data Migration Options:

For clients who require a data migration, LexisNexis can migrate data from one (1) entity in your incumbent Practice Management system to Lexis Affinity Library. The ability to bring across the existing data of your firm dramatically reduces the complexity, time and cost of the transition and allows you to concentrate on running your business. Information about migrating multiple entities is available upon discussion with a LexisNexis Relationship Manager.

Hardware Requirements:

Server	Workstation
A dedicated server is required. Please request a copy of the Operating System Configuration Requirements from LexisNexis for current specifications.	Please request a copy of the Operating System Configuration Requirements from LexisNexis for current specifications.

Software Requirements:

Operating System		Database
Server	Workstation	
Please request a copy of the Operating System Configuration Requirements from LexisNexis for current specifications.	Most currently supported 32 bit versions of Microsoft Windows desktop Operating System and some 64 bit versions. 32 bit and 64 bit Terminal Server environment. Please request a copy of the Operating System Configuration Requirements from LexisNexis for current specifications.	Oracle

v. Open Practice

CORPORATE PROFILE		
Company Name:	Open Practice Information	
Address:	Level 2 15 Astor Terrace SPRING HILL QLD 4001	
Contact:	Mandi Kaplan	
Telephone:	1300 366 002	
Email:	Mandi.kaplan@globalx.com.au	
Website:	www.openpractice.com.au	
Office Locations:	Brisbane, Sydney, Melbourne, Adelaide, Perth	
Number of Staff:		

Number of users by Location:	**QLD**	**NSW**	**ACT**	**VIC**	**TAS**	**SA**	**WA**	**NT**

Number of users by firm size:	**1-5**	**6-20**	**21-40**	**41-75**	**75-100**	**100+**

Company Profile:

Open Practice Information is a wholly owned subsidiary of GlobalX Information. We provide National land services, National corporate info, personal info and credit reporting within an integrated Practice Management solution (Open Practice). The company's head office is based in Brisbane with offices in Melbourne and Sydney. We serve Law Practices, Settlement Agents, Conveyancers, In-house Counsel, Government Departments and Mortgage processors.

We offer a One-Stop-Shop whereby you can increase your practices profitability via increased information, automated solutions and reduced duplication. Our legal software solutions are backed by a dedicated and experienced team ready to offer industry leading customer services and assistance with optimizing value from your implementation.

PRODUCT OVERVIEW	
Produce Name:	**Open Practice**

Product Profile:

Open Practice's fully featured environment offers Australia's best practice management software solution. By providing case management, trust accounting, document production, precedent management, legal time recording and innovative cost capture features, it creates the efficiencies and returns which make it a virtual profit delivery system. Our exclusive range of products cater for all practice management requirements, office automation and searching needs.

Licensing Arrangements and Costs (including Maintenance):

Open Practice is based on concurrent licensing. For licensing and maintenance costs, please contact our Sales Department via info@openpractice.com.au

Maintenance costs: Referred to as CFP. CFP allows you to keep up to date with the latest developments in your practice management investment. The service provides cost effective benefits such as software updates for all licensed software, on-going research and development.

Application Installation Details:

Open Practice operates on Microsoft SQL Server. The Open Practice database is installed via standard SQL Server procedures. The program files reside on the server under a standard directory structure.

Implementation Procedures and Associated Costs:

OP Consultant will install the OP database either on site or via remote access. Costs are by arrangements or under our standard consulting rates.

Summary of Training and Support Options:

Training: There are various training options from customized training; training Lawyers on specific areas they would use (e.g. Time Recording, Enquiry screens). Training Accountant / Bookkeeper on how to use the product and training Owners how to interpret reports.

Support: We provide personalized Help Desk support via our National Client Centre in addition to providing professional consulting advice in our product range. The National Client Care Centre operates from 7am to 7pm AEST, Monday through Friday. Weekend support can be organized by prior arrangement under standard consulting rates.

Data Migration Options:

For data migration options, please contact our Sales Department via info@openpractice.com.au. We also offer a manual bring on option which allows clients to manage their balances brought forward.

Hardware Requirements:

Server	Workstation
As per information on the OP website	

Software Requirements:

Operating System		Database
Server	Workstation	
As per information on the OP website		

w. PCLaw Plus

CORPORATE PROFILE		
Company Name:	LexisNexis (Reed Business Information Pty. Ltd. Trading as LexisNexis)	
Address:	Tower 2, 475-495 Victoria Ave Chatswood 2067	
Contact:	Customer Relations	
Telephone:	1800 772 772	
Email:	customer.relations@lexisnexis.com.au	
Website:	www.lexisnexis.com.au	
Office Locations:	Sydney, Melbourne, Brisbane, Adelaide, Canberra and Perth and International offices	
Number of Staff:	13,000 people globally	

Number of users by Location:	**QLD**	**NSW**	**ACT**	**VIC**	**TAS**	**SA**	**WA**	**NT**

Number of users by firm size:	**1-5**	**6-20**	**21-40**	**41-75**	**75-100**	**100+**

Company Profile:

LexisNexis is a world leading provider of content-enabled workflow solutions. Our innovative solutions focus on the needs of the legal industry to help your business succeed by improving productivity, increasing profitability and stimulating growth. Current solutions include online and print legal, regulatory, news and business products and services, tools and customised web applications for law librarians. Our valued research solutions are coupled with practice management tools to provide a unique offering to help our clients win.

PRODUCT OVERVIEW	
Produce Name:	**PCLaw Plus**

Product Profile:

PCLaw Plus s an all-in-one practice management solution for small law firms, that helps to save time and increase firm profitability. You can manage your entire practice with PCLaw Plus, a total solution that combines practice management software, precedents and online research tools in a single, integrated package that improves and streamlines your workflow processes.

Licensing Arrangements and Costs (including Maintenance):

PCLaw Plus is charged on a subscription model. The model is determined based on the number of users at the client site.

A subscription to PCLaw Plus includes – software licenses, software version updates, a precedent library of your choice, online research services, helpline, implementation and initial training and support.

Application Installation Details:

PCLaw Plus is a Win32 API program that stores persistent data in a specialist legal database that is designed specifically for law firms. The PCLaw Plus software will run on a properly configured computer workstation with data stored locally or as a network application on multiple computers with data stored on a File Server.

Implementation Procedures and Associated Costs:

LexisNexis use the expertise of certified independent consultants to assist with the implementation of PCLaw Plus. LexisNexis has developed a service approach that is designed to ensure an intrinsic link between client requirements and LexisNexis' service delivery. LexisNexis partners with its clients, to develop a structured planning and review process that reflects the firm's culture, business requirements and resources.

Implementation costs are included as part of a PCLaw Plus subscription.

Summary of Training and Support Options:

Support and implementation training are included as part of a customers subscription. If a customer requires additional training beyond those included as part of the subscription, these are charged on a time and materials basis.

Data Migration Options:

Hardware Requirements:

Server	Workstation
Please request a copy of the Operating System Configuration Requirements from LexisNexis for current specifications.	Please request a copy of the Operating System Configuration Requirements from LexisNexis for current specifications.

Software Requirements:

Operating System		Database
Server	Workstation	
Please request a copy of the Operating System Configuration Requirements from LexisNexis for current specifications.	Please request a copy of the Operating System Configuration Requirements from LexisNexis for current specifications.	Please request a copy of the Operating System Configuration Requirements from LexisNexis for current specifications.

Queensland Law Society

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