

**BCLMA Small Firm Subsection
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The Small Firm and Technology**

Speaking Notes

The Truth behind Microsoft Vista: How is the business community/legal community accepting this new operating system? What concerns should a firm have considering a conversion? What are some key differences? Pros and Cons?

Neither the business community nor the legal community is rushing to accept Microsoft's new operating system, which was released in January of this year.

I've been using Vista on my office computer for almost six months now, and I can tell you it works just fine – but from the average law office user's perspective, there aren't any significant improvements over Windows XP, either.

The biggest problem with switching to Vista is that you don't do your work in Vista – you work in your various applications. While Microsoft Office applications such as Word and Outlook play well with Vista, you would need to make sure that your other applications (accounting, practice management, cost recovery, to name a few) are compatible with Vista.

Hardware manufacturers haven't made it easy to resist Vista, seeing as it's almost impossible to find a retail computer that comes pre-loaded with Windows XP. Many offices buy business-grade computers by special order that still come with Windows XP, but those will eventually dry up as well.

However, the backlash against Vista in the business community has recently forced Microsoft to concede that installing Windows XP on a pre-loaded Vista computer constitutes a valid "downgrade" – that is to say, if you put Windows XP on a Vista computer, the Microsoft licensing police won't haul you away if they ever drop by for an audit.

So that leaves the following option for "future-proofing" any upcoming computer purchases: you can (1) buy computers with Vista pre-loaded, (2) remove Vista and install XP, and (3) upgrade that computer to Vista at some point in the future, if it ever becomes necessary. That will keep you within your licensing rights, and save you the software cost of a future upgrade to Vista.

I've installed both Vista and XP networks over the last year, depending on the firm's installed software base, and their users' level of resistance to change.

If you do want to go ahead with Vista, you will likely find that you need to upgrade to the latest version of your applications in order to use them with Vista, and there will undoubtedly be a cost associated with upgrading.

Some examples of common software that is not yet Vista-compatible are: Sedar, which securities firms use to file public documents; and some components of the ERS system supplied by Systems Auditing, which many firms use for cost recovery; and pretty much any version of anything that was released before this year.

Practice Management Software: The necessity for this software in an ever-increasing paperless environment. What key features does Practice Management Software provide it users? Differences of software available.

Practice management software, also known as case management software, allows firms to tie all aspects of their practice into one application, thereby increasing their efficiency.

If you haven't seen practice management software before, one way to think of it is like a super-powered version of Outlook that is tailored to the practice of law. While having the usual email, contact, calendar, and task functions, they also have timekeeping and document management functions, and allow you to integrate it all into a master list of matters – and to easily share it all with other members of your firm.

While there are other smaller players, I've found the biggest players in Vancouver's practice management arena are Amicus Attorney, Time Matters, and to a lesser extent, accounting systems such as PCLaw and ESILaw.

Amicus and Time Matters are full-fledged practice management programs, and include a comprehensive list of features. I've found that the big difference between these two is that Amicus is easy to use out of the box, but its customization options are limited. On the other hand, Time Matters has endless customization options, but you can't really use it out of the box until you customize it to some extent.

In recent years, PCLaw and ESILaw have quietly been adding various practice management functions with each new revision, to accompany their traditional accounting features. Only a small percentage of firms that have this software actually use these features, but nevertheless – they are there to be used. The situation has now reached the point where firms with limited practice management needs are deciding to not get full-fledged software, but instead are simply starting to use more of the accounting system that they already have.

Document Management Systems: What options are available to the small firm that will not break the bank?

A document management system (DMS) is a program that allows law firms to consolidate all of their documents, scans, and emails into a single application which is available to everyone.

Large firms use high-end DMSs whose cost put them out of the range of small firms.

Some small firms use the document management system that comes with Word or WordPerfect – essentially, the Windows file and folder hierarchy. As long as everyone subscribes to a standard method of saving documents, this option suits many small firms just fine, and the price is right – zero.

The next step up in terms of price is a custom-made DMS, constructed by a Word or WordPerfect programmer. These custom systems built into the existing word processing application can be as basic or as complex as your budget allows. Templates, macros, and toolbars can be put together to suit a firm's specific requirements, and can even approximate the most expensive DMS systems.

However, if you want to use advanced searches or the ability to save emails, you would need to use a DMS based on database technology, and these systems invariably cost more money.

You may find that you already have a DMS that you're not currently using. If you already have practice management software such as Amicus and Time Matters, you might be surprised to learn that they have a built-in DMS. Even the accounting program PCLaw has a built-in DMS that could suit the needs of a small firm.

If a small firm wanted more than a custom-made DMS in Word or WordPerfect, and wasn't impressed by what is built-in to software they may already have, I'd recommend that they look into WORLDDOX. WORLDDOX is a stand-alone DMS that isn't as expensive as what the large firms use, and it also integrates well with other legal applications.

Novell & GroupWise: Where does a law firm's future relationship lie with these products?

For those of you who aren't familiar with Novell products, Novell Netware is a type of server, and Groupwise is the Novell email system. The Microsoft equivalent of Groupwise is the Exchange and Outlook combination which most of you undoubtedly use.

There was a time 10-15 years ago when Novell networks outnumbered Microsoft networks, but the Microsoft "machine" has reversed that trend. The vast majority of newly-installed small networks use Microsoft servers, and I've done my share of conversions from Novell to Microsoft over the years – and never the other way around.

I'm neither for, nor against Microsoft in the emotional sense – I just go with the trends in the workplace, and the compass has been swinging in Microsoft's direction for many years now. The main issue for me is compatibility, and it's difficult enough to help different offices and users to share documents and emails seamlessly, without introducing different software vendors into the equation.

I think that Novell Netware's future in the small-business sector is murky at best, and Groupwise is losing ground to Exchange all the time. Recent graduates of technical schools are coming out with Microsoft training, not Novell training, so you have to wonder who will be looking after Novell networks once the existing crop of technicians have moved on. And what is probably the most important factor for me is that new server-based legal applications are focusing solely on Microsoft servers, and simply don't offer the support that they once did for Novell networks.

I was wondering if Brian could speak a little about conflict check software and open/closed file database software. We are currently on a very old version of DOS and would like to do an upgrade to a windows world. It seems either firms are using Elite which is too expensive and far more than we would ever use or they use their accounting software but don't seem to be too impressed with that. I am just wondering if there are any other alternatives that he might be aware of that are not too costly.

There comes a time in the growth of every small firm when the time-honoured method of conflict-checking – namely, shouting down the hall “Has anybody done any work for Joe Smith” is no longer feasible. Some firms take this a step further by sending the same question in email form to everyone in the firm.

The next step is to use software that has conflict check functionality built in to it.

The reality of conflict checking software is that in order for you to find information in a database, someone has to take the time to type it in to a database. And you don't want to waste time typing the same information into multiple applications, so firms who use conflict checking software effectively do so in one of two types of applications: (1) their accounting system, or (2) if they have one, their practice management system.

There are two small-firm accounting systems predominantly in use in Vancouver: PCLaw and ESILaw. Both have conflict checking, and what you get out of these searches is directly proportional to how much information is entered into them.

Firms that have a practice management system will enter even more client and matter information into them, and the leading systems like Amicus and Time Matters include conflict checking functionality.