

Bar Bytes

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Title: Understanding Legal Software Terminology

It's not easy to buy new software for your law office. It is even more difficult to decipher the terminology software companies use to describe their products. Knowing what you need and knowing what to ask for are integral to choosing the right software for your office. Here, at last, are some simplified definitions of the major types of law office software.

Document Management

If you want software that will make it easier to find work product (such as word processing documents) that your firm has already created, then document management software is what you are looking for. This software creates a full-text index of every document in your computer system. You specify which documents or folders on your computer or network that you want to index. The end result is a searchable database of information. You can then use key words or phrases to find documents. Even better, you can create a matching profile for each document as it is created, so that you can also know the author, the date, the client, the matter number, the type of document, and so on. You will never have to "reinvent the wheel" when you have document management software. Document management software is not limited to organizing word processing documents. Many lawyers use it to index their image files as part of a "paperless" office scheme. The software will accommodate a variety of electronic formats from scanned images to faxes.

Representative types of document management software: Worldox, Hummingbird/Docs Open, Cabinet NG and Interwoven.

Not to be confused with: document assembly software, such as HotDocs or Ghostfill, which is software that helps you generate document templates in a forms-driven practice.

Case Management

Think of all the types of information you typically utilize when handling a case: calendars; dockets; phone message pads; email; word processing documents; faxes; memos to billing; time tracking; and contact information like phone numbers and addresses. Now, think of it all in one place for every client, accessible in seconds on your computer. That's case management software.

Representative types of case management software: Time Matters; Amicus Attorney, PracticeMaster, Abacus.

Sometimes called: practice management software; but usually only when it encompasses both back office and front office functions, including accounting. Example: ProLaw from Thomson Elite.

Litigation Support

Do you have a complex litigation case? Do you need to organize and summarize a large number of documents, such as transcripts, documentary evidence, electronic discovery, OCR text, PDFs, and images? Is it important to attach video files or synchronize evidence with video? Then you need litigation support software. Litigation support software also enables you to put everything you need for a trial on a notebook computer, which can then be taken to court.

Representative types of litigation support software: Summation and Concordance.
Not to be confused with: trial presentation software, such as Sanction and TrialDirector. Use trial presentation software to make an audio-visual presentation to the judge and jury.

Time and Billing

Since lawyers aren't the only professionals who need to track their time and bill for it, there are a large number of products available. This software is used to capture case-related time and expenses, generate reports and bills, and integrate with accounting software.

Representative types of time and billing software: Timeslips, Juris, TabsIII, PCLaw.

Accounting

Software that includes trust accounting; accounts payable and receivable; general ledger; report writing; and check writing. It should integrate seamlessly with time and billing software. Many time and billing software makers offer their own accounting modules for sale.

Representative types of accounting software for lawyers: Juris, PCLaw

Contact management

This software combines calendaring and contact management (address book) functions. Key requirements for legal professionals: the ability to share calendars with others and "ticklers" to remind of impending deadlines. Calendaring and docketing are an integral part of case management software, but there are a few stand-alone products available, such as CompuLaw, Time & Chaos and Contact Plus.

Conflicts Checking

The best software to check for conflicts is a properly implemented and updated case management program. A second-best option would be time and billing or accounting software. There are a limited number of stand-alone products, including Accutrak and IntelliPad.