Understanding Law Office Software Terminology
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Choosing new software for your law office can be a confusing affair. It can be 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 are some simple definitions of the major types of law office software. Some of the software mentioned is installed on your computer system, some is available in the cloud, and some have both cloud and local installations possible.

Document Management

Make it easier to find work product (such as word processing documents) that your firm has already created by choosing document management software. While search engines built into computer operating systems may seem to make the task easier, it can be time-consuming combing through long lists of irrelevant documents. Document management software creates a full-text index of any document you choose to save. You can even index your old files and find them along with the new. 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 profile of each document as it is created, so that you can also find data by the author, date, client, matter number, type of document, and so on. With document management software you will never have to "reinvent the wheel" when it comes to drafting documents. 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 process. Documents are scanned and saved into the document management software.The software will accommodate a variety of electronic formats from scanned images to faxes.

Representative types of document management software: Worldox, iManage.
Not to be confused with: document <u>assembly</u> software, such as HotDocs, TheFormTool, or Pathagoras - software that helps you generate forms.

Case Management

Think of all the types of information you typically utilize when handling a case: calendars; notes; 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. Next to accounting software, case management software is by far the most utilized law office-specific software by lawyers in small and mid-size law firms. It is sometimes called practice management software, but usually only when it includes accounting functions (like accounts receivable and payable). Like document management software, case management software can be part of a paperless office.

Representative types of case management software: Time Matters, PracticeMaster, ProLaw, Clio, CosmoLex, Rocket Matter, MyCase, Actionstep, AbacusLaw, Needles, PracticePanther, Zola Suite, Smokeball.

Litigation Support

Do you have a complex litigation case? Do you need to organize and summarize boxes 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 or e-discovery software.

Representative types of litigation support and e-discovery software: Summation, Concordance, Logikcull, Lexbe.

Not to be confused with: trial presentation software, such as CaseMap Sanction or TrialDirector 360. 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. It's important to note that most, if not all, case management software products today come with time keeping and billing functionality.

Representative types of time and billing software: Timeslips, Juris, Tabs3, PCLaw, Bill4Time, RTG Bills.

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. Some time and billing software makers offer their own accounting modules for sale.

Representative types of accounting software for lawyers: Tabs3, Juris, PCLaw, AbacusLaw. Quickbooks Pro is accounting software, but not specifically designed with the law office or legal ethics in mind.

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 RTG Conflicts and Legal Software Systems Inc.

Product Links:

AbacusLaw www.abacusnext.com/
Bill4Time www.bill4time.com/legal-billing-software/
CaseMap Sanction www.lexisnexis.com
CompuLaw www.aderant.com/solutions-calendaring-compulaw

Concordance www.lexisnexis.com/litigation/products/ediscovery/concordance
Contact Plus www.contactplus.com/products/index.htm
CosmoLex www.cosmolex.com
HotDocs www.hotdocs.com
iManage imanage.com
Juris www.juris.com/
Legal Software Systems www.legalsoftwaresystems.com
Lexbe www.lexbe.com
Logikcull www.logikcull.com
Pathagoras www.pathagoras.com/
PCLaw www.pclaw.com/
PracticeMaster www.stilegal.com/products/practicemaster/pm_overview.html
ProLaw www.elite.com/solutions/product-fam/prolaw/index.asp
Rocket Matter www.rocketmatter.com
RTG Bills www.rtgsoftware.com/
Sanction www.lexisnexis.com/en-us/products/sanction.page
Summation accessdata.com/products-services/summation/
Tabs3   www.stilegal.com/products/tabs3/tabs3.html
TheFormTool www.theformtool.com
Time Matters www.timematters.com
Timeslips www.timeslips.com
TrialDirector   https://iprotech.com/software/trial-director/
Worldox www.worldox.com/