

Software Solutions 2006

A Guide to Legal Software Suppliers



The Law Society

Software Solutions
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Software Solutions

Customer feedback
panel analysis
Independent view
user base
features





A word from the President

Welcome to the 2006 edition of the Law Society's Software Solutions Guide. Now in its eighth edition, this Guide continues to be the single most influential source of information about the legal software systems available to solicitors in England & Wales. While not intended to provide an exhaustive list of all the options available, the 15 case and practice management software suppliers featured in this Guide have passed a rigorous vetting procedure – which includes an evaluation of their products by our selection panel, an assessment of their corporate financial health by chartered accountants and extensive market research into the views of existing users of their systems – thereby providing you with an excellent starting point for your IT purchasing decisions.

Despite the fact that some law firms have been using computer systems of one form or another for the best part of 30 years, far too many solicitors still view technology as something special – a 'thing' that must be handled with kid gloves. The reality is more mundane, for IT is now a pervasive aspect of running a modern law firm. Like electricity and telephones, it is one of those things you must have today – the ubiquitous nature of email is a good example of this trend – and probably the sooner more lawyers start treating IT as just another part of the law office wallpaper – part of the infrastructure – and stop worrying about the mystique surrounding the subject, the happier they will be.

However, before technology can work properly, it must be seen in its correct context as a complementary, or enabling, part of the firm's overall practice and business development plan. A firm must first decide where it is going as a whole – such as which areas of legal practice it wishes to focus on and what types of clients it wants to serve – and then, but only then, turn its attention towards how technology may help it achieve these objectives. Or, to put it another way, legal technology's true role in life is to help you make more money, get home earlier of an evening – and still keep the client satisfied.

A handwritten signature in black ink that reads "Kevin Martin". The signature is written in a cursive, slightly stylized font.

Kevin Martin

President – The Law Society of England and Wales

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Introduction and explanation of the scheme

The Software Solutions Guide is designed to help law firms make more informed decisions about legal IT suppliers. Each year, the Law Society invites specialist legal software suppliers to apply for inclusion in the Guide. The Law Society is happy to recommend the suppliers featured in this Guide, who have met the criteria outlined below.

Selection criteria

Suppliers need to demonstrate the following:

- Financial stability
- Satisfactory customer feedback research
- An integrated practice management system

Financial assessment

The accounts of each company are examined by independent accountants, who analyse profitability, liquidity, cash flow and turnover and assess the ability to pay creditors. Suppliers must meet a defined minimum score to be included in the Guide.

Customer feedback research

Approximately 40 customer firms per supplier are selected at random and are interviewed by independent market researchers. Customers are asked to rate their supplier against a range of factors such as ease of use and quality of training and support and the overall rating for each factor is published in the Guide.

Software and company assessment

Suppliers are asked to attend a meeting with the selection panel, where they demonstrate their software. The selection panel pays particular attention to specific features, which this year included email integration, money laundering checks, client conflict checking and compliance in general.

Final assessment

The selection panel makes the final decision on which suppliers should be included in the Guide, based on the selection criteria outlined above.

The panel

Robin ap Cynan - Council Member, Principal, Lupus Mediation

David Cannell - ICT Director, Goldsmith Williams Solicitors

Neil Davidson - Solicitor, Harrowell Shaftoe

Tony Fisher - Managing Partner, Fisher Jones Greenwood

Simon Young - Council Member, Legal Management and Training Consultant

Mike Gorick - Practice Director, Marshall & Galpin

Tim Hill - E-Commerce Policy Adviser, Law Society

Rupert White - IT Reporter, Law Society's Gazette

It should be noted that the selection panel does not undertake detailed technical testing and relies on the representations of suppliers. With this in mind, firms are advised to make their own enquires as to the validity of claims. As the purchase of software is a private contractual matter, the Law Society cannot accept any responsibility for disputes resulting from the information in this Guide, nor intervene directly in disputes.

Funding of the Guide

This Guide is funded entirely from contributions received from the suppliers included in the Guide. This funding enables the Law Society to carry out the customer feedback research, production, printing, administration and free distribution of the Guide to all law firms in England and Wales.

How to select legal software

This is a potentially huge topic that is examined in more detail on the Software Solutions Guide's accompanying website at www.it.lawsociety.org.uk. However, the following tips and tricks highlight some of the issues that can be associated with the selection of legal software.

It is for solicitors to ensure that whatever software is purchased enables them to comply with the requirements of the Solicitors' Accounts Rules and that the new system operates correctly before the old system is abandoned.

In devising your business plan, take into account both your immediate needs and what you expect to be doing in five years. For example, do you have plans for branch offices? Will you still be handling legal aid work?

Be clear about what you hope to gain from your investment in IT. Ideally, it should help save you money – typically by reducing the number of clerical staff you need to support fee-earners – and help you earn more money by improving efficiency and hence profitability.

Prepare a budget. How much can you afford to spend, taking into account essential extras such as installation, staff training and annual maintenance fees? These prices exclude hardware. As a rule of thumb, assume annual running costs of approximately one third of the initial capital outlay.

When building your plan, never underestimate the importance of allowing enough time and money for the appropriate amount of initial training and refresher courses required in order to get the most from your new system.

Use this Guide and its recommendations to draw up a shortlist of suppliers whose products seem to meet your needs – although please note this is not an exhaustive list of all the options available.

You should note that the pricing in the Guide is only an indication and that you should be prepared to spend time with your shortlisted suppliers, making sure all parties are clear on what is required.

Evaluate the shortlisted suppliers by visiting their reference sites to see their systems in operation, talk to the users of these systems and meet the suppliers' personnel to ensure they are the sort of people you can work with over the next few years.

Ensure that members of your staff who will be expected to use the new systems are included in the selection process. Not only will this help win their 'buy-in' to the project, but their alternative perspectives can be invaluable in assessing the respective merits of different products.

Make your final selection and enter into contractual negotiations with the prospective supplier over not only costs but also delivery dates, implementation timetables and provision and scheduling of staff training so it fits in with your priorities.

You can read and download a series of advice papers and the previous Software Solutions Guide from the Law Society's website. A special section has been set up for IT advice at www.it.lawsociety.org.uk. You can also catch news about IT and the law in the Law Society's Gazette every week.



Risk management and compliance – Taking a positive perspective

by Charles Christian

Any solicitor who has been reading these guides from the outset will have noticed the way risk management and similar related disciplines have come to play a more and more important role as components of today's legal IT systems.

From merely generating Rule 15 client care letters, legal software has evolved over the years so it now includes support for conflict-of-interest checking, anti-money laundering procedures, risk management and compliance with quality standards such as LEXCEL. Indeed, there are some practice management systems out there whose main selling point seems to be the fact that they can substantially automate the new client inception process – so as to not only reduce the amount of time between taking on a new client and being able to bill them, but also to ensure that a firm complies with all the professional and legal red tape it is subject to – and generate a sound audit trail to prove all the necessary procedures were followed. And if you think the current measures are onerous enough, there could be far worse to come if the UK follows the United States down the compliance road – there are already signs the EU is thinking along these lines. For example, just ask any of your professional colleagues who are engaged in international commercial work for US clients how burdensome they find compliance with measures such as Sarbanes-Oxley.

The problem with compliance is that while it may be a necessary evil, it is very hard to get enthusiastic about the subject. Just try selling your partners the idea they must cut back on their drawings this year because they need to invest in a new practice management system merely to comply with the latest regulations. However, there is another way to look at this, and that is to stand the whole compliance/risk management/quality assurance issue on its head and view it not as a back-office overhead, but as a way of gearing up your practice to provide a more efficient, and profitable, service to your clients.

Let's start by looking at risk management principles in general. These include the need to identify key areas of risk, to set up structured systems and processes to avoid such risks, and to have fail-safe systems to back up and manage these processes. The LEXCEL standard also identifies a number of key steps in risk management, including the need for case plans, appropriate fee-earner skills and team-working, the supervision of staff, file management and diary control.

Now let's consider the traditional features of a case management system – and as you will have seen from this year's Guide, all the suppliers listed here now offer some form of case management software.

There will be a case plan or structured workflow for handling a particular work type from inception to completion. Such case plans will also have to comply with general practice principles, such as the Civil Procedure Rules, as well as more client-specific requirements, such as legal aid franchise rules or those that mortgage lender and insurance company panel members are required to follow. There will be a matter or file management system, so anyone working on the case can immediately see what has been done and what has still to be done. There will also be strict diary controls to keep track

of key dates and remind fee earners of looming deadlines and tasks that need completing. There will be a way of assigning tasks and delegating responsibility to more junior fee earners. There will be extensive management reporting facilities, so partners and department heads can monitor actions and remain in effective control. And there will be some form of fail-safe system to ensure that deadlines are not overlooked because a key member of the team is on holiday or has been taken ill.

For all practical purposes, the components of risk management and quality assurance systems are identical to the components of a case management system. Or, to put it another way, case management and risk management systems address the same problems and issues, but from different perspectives. So, while it is true that risk has become a serious concern, if you are running case management software, you may already have most of the infrastructure in place to implement a risk management/quality assurance strategy.

But what about those firms who do not yet have a case management system?

There remains a perception that case management software is strictly synonymous with processing high-volume, low-margin legal work (such as debt collection, bent-bumper motor claims, residential conveyancing and personal injury claims) and that unless a firm has aspirations in this direction, there is no point in investing in such systems. However, the legal IT market has moved on and, along with traditional case management software, we are now also seeing the introduction of more file/matter/workflow management systems that merely automate just some of the aspects of the legal processes common to all matter types, such as opening the file, running conflicts-of-interest and money laundering checks, sending out the Rule 15 client care letters, filing documents and emails against the correct client/matter files and diarising case plans (by way of confusion, some suppliers have integrated these functions into their accounts and practice management systems rather than offer them as dedicated matter-management systems).

The positive side to these systems is that along with addressing risk management issues, the software can also have a beneficial impact upon the bottom line. For example, if such systems save fee earners just a few minutes of administration time on each matter every day – so instead they can devote their time to more profitable work – when totalled up across every fee earner in a firm over the course of a year this can become a serious amount of money, enough to help a system pay for itself within a relatively short period of time, even within a smaller practice. And that is not even taking into account the financial benefits of limiting your exposure to negligence claims, being able to negotiate more favourable indemnity premiums, or being able to demonstrate to prospective clients that you have the infrastructure in place to ensure you comply with service level agreements and quality assurance standards.

Compliance may be a necessary evil but, with the right technology tools at your disposal, today you can also leverage a profitable benefit from it.

You can keep up to date with Charles Christian's writing on the latest developments in legal technology on his website, Legal Technology Insider. Just visit www.legaltechnology.com.

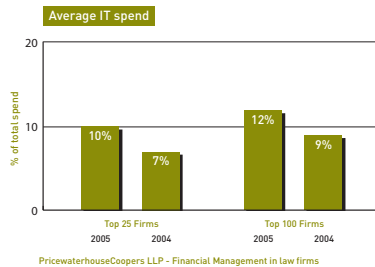


Security and continuity must be addressed in 2006

by Rupert White - IT Reporter, *Gazette*

Some of the most important things that preparing for the Guide throws up are the results of the market research, obviously, and listening to what the systems vendors have to say about 'the market', i.e. you.

The big picture of how technology might change lawyers' lives as well as help them adapt to market pressures is, generally, getting clearer. It might sound to most law firms like it is going to cost the earth but, in what will most likely become an ever more commoditised market, firms need all the differentiators they can get.



A 2005 PwC report on law firm finances found that the big firms barely moved on their IT spending from 2004, except for spending on software, which rose by three percent of total IT spend. This is a sum not to be sniffed at for a top 25 or top 100 firm. To put the increase in perspective, it is an uplift of over 40 percent.

Smaller firms are certainly not going to increase their software budgets by 40 percent in 2006. But failing to understand the value of your customer information and how safe you need to keep it, and not investing in systems that will help you do this, will get you nowhere, fast.

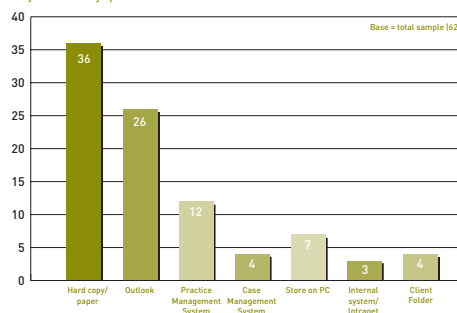
Data security

A major theme of our vendor interviews and the research was security. This is arguably one of the most important aspects of legal IT. Why? Because personal client information is at the very heart of your business. It makes you money and enables your client relationships.

How security conscious you are about keeping documents should extend naturally to email.

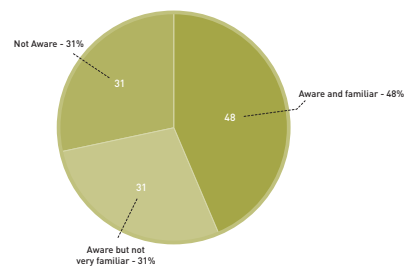
System used to file and store emails

What system do you use for filing and storing your emails by specific matter?



Awareness of Law Society Guidelines for managing emails

Are you aware of the Law Society Guidelines for managing emails?



High on half of those polled said they were aware of the Society's email guidelines, but 61 percent of those do not use a practice management system to store emails. Just over a quarter of all those questioned use Outlook to store email, and 36 percent use printouts. One can only hope that this is in addition to electronic storage, but this is likely not the case.

Repeat this in your head until it becomes a mantra: do not store emails only as hard copies if you will ever need to rely on them in any way. This is mainly an evidence issue, but it points up serious problems in the safety of email storage.

Business continuity

The oil depot explosion in Hertfordshire at the end of 2005, and the damage done to businesses around the site, should be a wake-up call when it comes to 'business continuity' or 'disaster recovery'.

Listening to vendors, DR seems to be seen by not a few law firms as a flavour of backup. Companies that offer elements of and advice on DR don't seem to be getting the kind of take-up one would expect in enlightened times. This is no doubt a selling-in issue – that systems providers aren't making a good enough case for it – but it is also because law firms are lagging behind in understanding.

There is a big difference between backup and DR. Backup is one part of DR. Disaster recovery is also about where staff will work if your building is damaged, how they will work and what kind of access to your firm's information they can get. It is all very well to have all your data backed up, but if you can't get to it, it is as good as useless.

The fully outsourced system is no doubt overkill for most law firms. But full marks for thinking big go to vendors who are trying to persuade customers to push information to offsite servers on a regular basis. This is corporate thinking, and it works.

Offsite mirroring would allow your company, most likely, to use its data without going through the tedious process of tape restore (anyone who has been through this knows how time-consuming and fraught with error and loss it can be) and use recent, even today's data. Make sure the firm holding your data has a bona fide disaster recovery plan, though. Do a tape backup as well, and your firm is going to look a lot more bulletproof than the competition.

It was disturbing to hear some vendors say that, in real restores, one in ten law firms would find their last backup unusable, because many firms do not do any tape verification. This would be catastrophic.

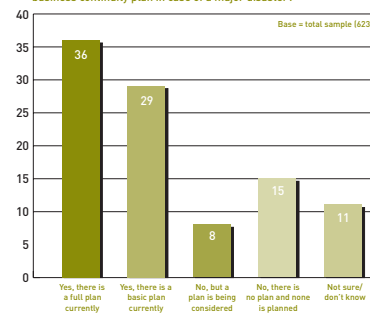
One of the market research results the more cynical observer might struggle to believe is that 65 percent of those polled claimed to have some kind of documented business continuity plan. Even more surprising was that the majority of this number, 36 percent of everyone polled, said yes, "there is a full plan currently in place".

Why is this hard to believe? Put bluntly: because when respondents were asked what percentage of their overheads were down to IT, half didn't know, or weren't sure. Of the respondents, 17 percent were practice managers, 13 percent IT managers and 11 percent were partners.

It is impossible to ignore the incongruity between how many said they have a DR plan and the number who do not know how much they are spending on IT every year. This does not mean law firms do not have plans. It just means those plans might not be worth the paper they are written on.

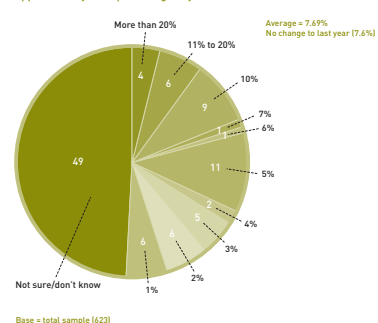
Documented business continuity plan

Does your law firm currently have in place a documented business continuity plan in case of a major disaster?



Percentage of overall overheads that are IT

Approximately what percentage of your overall overheads is IT (costs)



We welcome Access to the guide as a new entrant this year. The company has been in the legal software market for over twenty years and has achieved credible market research results, which illustrate that it is well supported by a loyal customer base.

Access offer a fully integrated accounting and case management package on a robust SQL platform. The system offers automated conflict checking of name and address when entering a new client or new name onto the system, though this is not set up as mandatory. It also allows for more extensive checks including search of matter description.

The panel liked in particular the reporting facilities on fee earner performance, and look forward to future product improvements, including the provision of web access to the case management system, promised for the coming year. The panel would also particularly like to see improved email integration and document version control introduced over the next twelve months. All document version control in the present version is left to Microsoft Word, unlike many other systems in the guide which have developed their own, integrated, document version control features.

As it stands, however, Access offer a fully featured package, which is well regarded by the installed user base.

Rating on Key Company Attributes

Provides innovative solutions	7.15	
Professionalism of sales approach	8.18	
Ease of doing business	8.13	
Keeps clients up to date with changes/pressures in legal practices	7.35	
Genuine concern that firm is gaining maximum benefit from using PM system	7.28	
Quality of training offered	7.73	
Understanding of legal business	8.31	
Quality of service support	8.08	

Rating on Key Product Attributes

Range of features	7.45	
Comprehensive range of functionality	7.46	
Total cost of software/maintenance	7.25	
Appropriateness for size of law firm	7.80	
Ease of configurability	7.10	
Improves efficiency and effectiveness of Law Firm	7.51	
Apparent ease of use	7.53	
Ongoing support offered	8.23	
Reliability of system	8.15	

Overall Rating

Overall reputation of the Company	8.15	
Overall satisfaction with practice management system	7.35	

Although this edition marks Access Legal Systems' well overdue debut in the Software Solutions Guide, the company actually installed its first legal accounts and time-recording system in 1980 and today has a product range that is well suited to the needs of today's High Street market. And, in common with some of the other less headline-grabbing suppliers featured in this guide, over the intervening quarter of a century, Access has built up a substantial and loyal user base. Product-wise, in the late 1990s Access totally re-wrote all its applications to run on a Windows platform based on a single SQL database, so users now have the benefit of a fully integrated practice management system incorporating practice and client database, case management, legal accounting and time recording.

This platform also gives Access scope to take its products forward in the foreseeable future and recent enhancements have included the introduction of a commercial-style balance sheet and automatic conflict-checking in the accounts system, email and SMS texting in the case management system and marketing reports and pro forma invoicing in the database. Future plans include cash flow forecast reporting in accounts, internet access and integration with Microsoft Outlook for case management and the extension of marketing facilities to enhance the CRM (client relationship management) capability of the database. Access currently supports not only the Windows NT/2000/2003 and XP platforms, but also Linux, Unix and Novell, while the database size is limited only by memory, disk space and platform restrictions.

Product Pricing (Average cost per seat)

Access Practice Management System					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	£3,670	£1,744	£961	£833	£722
Software Installation (days)	0	1	1	2	3
Project Management (days)	0	0	0	0	0
Training (days)	2	5	9	15	20
Annual Maintenance/Support Charge	£670	£1,410	£3,300	£5,040	£8,150
Maintenance included in year 1	-	-	-	-	-

User Base

Access Practice Management System		1-5	6-20	21-40	41-75	75+	Top 100
Total firms	70	Firms	16	28	20	6	0
Total users	1,222	Users	50	345	535	292	0

Excludes local government

Suitability for size of firm

	ACCESS
Solo/Very Small 1-5 Users	●
Small High Street 6-20 Users	●
Medium High Street 21-40 Users	●
Larger High Street 41-75 Users	●
Commercial and Regional Firms 75+ Users	●
City and Major Regional Firms Top 100 Firms	



George Fowler - Managing Director

For more than 25 years, Access Legal Systems has been a specialist supplier of software solutions to the legal profession. Our staff are loyal, dedicated and have extensive knowledge of legal practice and the applications that we supply. Our systems are fully functional and reliable and are complemented by professional training and support.

At the heart of our applications is a single SQL database which supports a fully integrated Practice Management System with functions to handle Practice and Client Database, Case Management, Legal Accounting and Time Recording and Time Capture.

Throughout our years of commitment to the legal profession, we have given an absolute priority to ensuring the continuity of our client data. We have achieved this by rigorously enforcing appropriate backup procedures, by ensuring that the technology is suitable to the task in hand and by offering full conversion of data to new operating platforms. Practices which have been with us for all of our 25 years have been able to seamlessly migrate from one technology platform to the next without loss of data and without disruption to workflow.

Contact Details

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AIM's Evolution product was rebranded as Evolution Insight and launched in Autumn 2005. The core upgrade is included in the maintenance charge for existing customers.

The main focus of the new product is enhanced reporting, which should help practices improve performance and better manage relationships with clients. The thrust is to allow management by exception. Features include an improved client contact screen and flexible reporting facilities – for example, listing your 'Top 50' clients.

AIM has clearly thought through the ergonomics of the user interface, with colour coding to help fee-earners and managers quickly utilise search results.

'E-Vigilance' is a new module, developed for Insight, to automate the sending of active alerts using email, SMS text and html to fee earners, managers, clients or referrers. For example, an alert can be set up concerning outstanding matters, to be sent out every two weeks, or automatically, as certain pre-defined criteria are met.

There is no drag-and-drop facility to link emails to matter files, but the process of selecting an email and selecting a matter is straightforward. Reflecting the importance of efficient time recording, which AIM says delivers a faster return on investment, the system even offers automatic time capture whenever an email is opened that relates to a particular matter or client, for example.

The Guide panel was pleased that the system enforces mandatory conflict and anti-money laundering checks. Information is held at the client level, which enables a fee-earner to view a file and decide if, for instance, a utility bill was sufficiently recent to be used. Search criteria for conflict checking can be easily amended – perhaps according to practice area, for example.

AIM maintains an excellent reputation in the legal market, despite some customer frustration over delays in the release of its eagerly awaited new version. Since the conclusion of our research project, over a third of its customers have successfully migrated to the Insight platform.

Rating on Key Company Attributes

Provides innovative solutions	7.00	
Professionalism of sales approach	7.78	
Ease of doing business	8.05	
Keeps clients up to date with changes/pressures in legal practices	8.05	
Genuine concern that firm is gaining maximum benefit from using PM system	7.75	
Quality of training offered	7.97	
Understanding of legal business	8.10	
Quality of service support	8.00	

Rating on Key Product Attributes

Range of features	7.73	
Comprehensive range of functionality	7.82	
Total cost of software/maintenance	7.88	
Appropriateness for size of law firm	8.33	
Ease of configurability	7.20	
Improves efficiency and effectiveness of Law Firm	8.08	
Apparent ease of use	7.97	
Ongoing support offered	8.26	
Reliability of system	8.38	

Overall Rating

Overall reputation of the Company	7.38	
Overall satisfaction with practice management system	7.70	

Since last year's edition of this guide, there have been over 200 enhancements made to AIM's flagship system, Evolution, which has now been re-branded as Evolution Insight. Broadly speaking, these enhancements can be summed up as features that are admirably suited to help firms operate better as commercial enterprises, rather than the hit-and-miss approach some still have towards business administration. For example, for fee-earners, new features include a matter-based report generator providing access to all time, financial and case management-specific data, whilst on the bookkeeping side, there is a new nominal reporting system that includes trial balance, horizontal and vertical balance sheets, profit and loss and full listings.

Evolution Insight can also provide a single view of all client matter-based correspondence, including emails, scanned images, forms and documents, which can be stored and managed in user-defined folders if required. This is sometimes termed 'matter-centric computing' – in effect, the digital equivalent of the old manila folder – which is one of the hottest concepts in legal technology today. And AIM has also recently launched E-Vigilance, its business automation toolkit. Based on the concept of "active" exception management, this provides firms with a simple way to deliver key information and alerts via email, web browsers and SMS text messaging. The system is supplied out of the box with 20 pre-defined alerts, including money laundering, WIP management, missing timesheets and matter milestone reminders. It can be used to automate other areas of reporting within a firm, delivering alerts to anyone, including staff, clients and referrers.

Product Pricing (Average cost per seat)

EVOLUTION Insight					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	-	£2,200*	£2,000*	£1,500*	£1,300*
Software Installation (days)	-	1	2	3	6
Project Management (days)	-	2	3	5	7
Training (days)	-	7	14	22	24
Annual Maintenance/Support Charge	-	£2,500	£4,500	£6,500	£10,000
Maintenance included in year 1	-	-	-	-	-

E-Vigilance

Cost per seat	-	£700	£175	£88	£45
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Evolution Insight - "Cost per seat" includes full PMS with accounting, time capture, billing, contact management and comprehensive reporting suite. Systems over 5 users also include file management and matter correspondence management including filing of all incoming and outgoing emails.

* Evolution Insight price Includes Microsoft SQL Server licence for a single database server.

User Base

EVOLUTION		1-5	6-20	21-40	41-75	75+	Top 100	
Total firms	189	Firms	18	32	44	47	48	2
Total users	9,243	Users	48	392	1,255	2,238	5,310	435

Excludes local government

Suitability for size of firm

	EVOLUTION INSIGHT
Solo/Very Small 1-5 Users	●
Small High Street 6-20 Users	●
Medium High Street 21-40 Users	●
Larger High Street 41-75 Users	●
Commercial and Regional Firms 75+ Users	●
City and Major Regional Firms Top 100 Firms	●



RICHARD BEARPARK - Chief Executive

AIM is firmly established as a leading supplier to the legal market, with a comprehensive range of solutions and services. All are designed to deliver better business performance to clients who get a real return on their investment.

During 2005, we announced new application software and new technology partnerships, all focussed on addressing critical issues facing legal businesses today, such as risk management and increased competition in the market.

Evolution Insight, our major new release, has over 200 new features, together with a powerful new reporting suite. The announcement of DocuMail means greatly enhanced productivity for users of Microsoft Office, whilst E-Vigilance allows automatic identification and communication of potential business risks.

Our continuing investment in new technology and staff development was rewarded when we were accredited as a Gold Partner by Microsoft, one of our key partners.

The AIM users' association is the UK's largest and most proactive independent legal systems user group. We are delighted by the feedback we receive, stating that we are easy to do business with and have a professional culture that continues to be highly supportive of their business needs.

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AlphaLAW (formerly MSS) continue to be top of the rankings for market research. They retain their customer loyalty for good reason.

For the user, their software is clear and well presented. As far as case management is concerned, their design process is particularly impressive. Customers can develop their case flows from an easy-to-use flow chart using their own or AlphaLAW precedents.

We also liked the easy ability to have several matters running on the screen at the same time. This may not be unique, but they do make it easy. At the same time, there are notifications of credit limits (a fee-earner decision) and risk assignment. There is good privilege access control.

Reports to fee earners are their own and not generated from the infamous Crystal. This is much better for the small- to medium-sized firms to manage.

AlphaLAW are clearly used to working with firms whose work comes from bulk suppliers. Service level agreements will require good case-tracking facilities and AlphaLaw support their users very well in this aspect.

They also have a clear vision for the future. They see their market as extremely competitive, possibly leading to mergers. This might lead decision-makers to take stock of who their current supplier is if they agree with this view. It is also their view that there will be increased mobile working. They want to create systems which provide the "average" user with capabilities normally only available to the larger firms.

Finally, today's essential thinking includes Business Continuity Planning. As you would expect, they have thought about it carefully. They are able, they say, to supply, for a relatively modest annual fee, help with the restoration of everything (not exclusively IT) to get a business up and running in the event of a disaster.

Rating on Key Company Attributes

Provides innovative solutions	7.85
Professionalism of sales approach	8.18
Ease of doing business	8.10
Keeps clients up to date with changes/pressures in legal practices	8.26
Genuine concern that firm is gaining maximum benefit from using PM system	8.05
Quality of training offered	8.25
Understanding of legal business	8.37
Quality of service support	8.58

Rating on Key Product Attributes

Range of features	8.60
Comprehensive range of functionality	8.43
Total cost of software/maintenance	7.83
Appropriateness for size of law firm	8.68
Ease of configurability	8.28
Improves efficiency and effectiveness of Law Firm	8.54
Apparent ease of use	8.75
Ongoing support offered	8.73
Reliability of system	8.95

Overall Rating

Overall reputation of the Company	7.95
Overall satisfaction with practice management system	8.88

Along with a major re-branding exercise, which sees MSS as it previously was become AlphaLAW, for the second year running, this supplier has gained top marks in the customer satisfaction survey that forms part of this guide. However, as well as focussing on services and support, AlphaLAW has also been rolling out some major enhancements to its flagship AlphaLAW-*Vantage* product. The most significant of these is a new Microsoft .NET-based case management module, called AlphaLAW-*UNO*, that utilises XML web services to provide a highly mobile, comprehensive and scalable solution. New features here include: a case workflow definition process that allows users to create workflows and build intelligence into the process, so much of the work can be carried out by non-qualified staff under supervision. There is also a significantly enhanced diary that should make it easier for users to manage and schedule appointments, with Microsoft Outlook diary Synchronisation allowing users to take their diary away with them on devices such as PDAs and Smartphones.

The system now also includes a set of default compliance checks to warn users about possible digressions, and a new user-defined 'due today' facility providing vital information about the day's appointments, active matters and tasks, as well as fee-earner key performance indicators. Finally, the company has not forgotten its entry-level – and I think seriously underrated AlphaLAW-*Esprit* practice management system for small firms. Recent enhancements have been centred on the continually changing requirements of the LSC, including tailored fixed fees, new forms and new end-codes.

Product Pricing (Average cost per seat)

AlphaLAW-Esprit					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	£1,770	£689	-	-	-
Software Installation (days)	0	1	-	-	-
Project Management (days)	0	0	-	-	-
Training (days)	1	2	-	-	-
Annual Maintenance/Support Charge	£443	£783	-	-	-
Maintenance included in year 1	-	-	-	-	-

AlphaLAW-Vantage					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	£4,150	£1,460	£884	£793	£740
Software Installation (days)	0	1	2	3	4
Project Management (days)	0	0	2	3	5
Training (days)	2	3	5	10	18
Annual Maintenance/Support Charge	£747	£1,159	£2,704	£4,764	£8,369
Maintenance included in year 1	No	No	No	No	No

User Base

AlphaLAW-Esprit		1-5	6-20	21-40	41-75	75+	Top 100
Total firms	731	Firms	408	323	0	0	0
Total users	1,856	Users	887	969	0	0	0

User Base

AlphaLAW-Vantage		1-5	6-20	21-40	41-75	75+	Top 100
Total firms	269	Firms	81	93	59	28	7
Total users	5,322	Users	240	891	1,641	1,499	871

Suitability for size of firm

	AlphaLAW-Esprit	AlphaLAW-Vantage
Solo/Very Small 1-5 Users	●	●
Small High Street 6-20 Users	●	●
Medium High Street 21-40 Users		●
Larger High Street 41-75 Users		●
Commercial and Regional Firms 75+ Users		●
City and Major Regional Firms Top 100 Firms		●



Simon Meehan - Managing Director

Being rated first in 13 out of 14 categories in last year's guide was always going to be a hard act to follow. To that end, the 2005 results acted as a spur for us to work even harder to give our clients excellent software solutions and service that offered more performance, more productivity, more reliability, more profitability and more value.

This philosophy has been recognised and again we have been rated 1st overall in the customer satisfaction survey in the 2006 Software Solutions Guide.

At AlphaLAW, we're committed to helping you get the most out of your AlphaLAW systems. We make sure that you receive the hardware, software and services that make the most sense for your legal business, technically and economically. From controlling the total cost of ownership to helping you manage new capabilities and services. Our product and technical support departments offer fast, reliable response to anything from routine questions to emergency service. We'll get to know your business, anticipate your evolving needs and ensure that your AlphaLAW solution meets both your bottom line and your competitive needs.

At AlphaLAW we support your business with the technology, service and training you need to optimise the value of your services and gain a competitive advantage.

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1-5

6-20

21-40

41-75

75+

Top 100

This is extremely well automated and astonishingly flexible software which very much impressed the panel with its breadth of capacity.

New for 2006 (but not unique in the market) was the optional use of OLAP (online analytical processing) as an excellent and easily configurable analytical tool called Vision. This lets the user cut and slice of data in many different ways, the better to allow any law firm to understand not only its bottom line, but how it is getting there, fee-earner by fee-earner, work-type by work-type, department by department.

Vision frees a firm from the straightjacket presented by the challenging programming required to achieve the full flexibility ultimately offered by Crystal reports (whether or not linked with export to Excel).

The panel felt that Axxia was inexpensive for the large firm but, regrettably, fiscally unavailable to the smaller firm. Vision adds hugely to what it has to offer, but at an additional price, as quoted to us, of £10-20,000. This might be typically £13,000 out of the box, but up to £30,000 fully configured.

Any firm contemplating working with Axxia will need to set aside substantial internal resources to make sure that they get the best out of the available toolkit, ensuring that all the modules and products are streamlined from the user perspective.

However, the firm that can do this can achieve superb results in partnership with the considerable suite of enticing products and modules that Axxia has to offer.

Rating on Key Company Attributes

Provides innovative solutions	6.46	
Professionalism of sales approach	7.55	
Ease of doing business	7.28	
Keeps clients up to date with changes/pressures in legal practices	7.03	
Genuine concern that firm is gaining maximum benefit from using PM system	6.85	
Quality of training offered	7.13	
Understanding of legal business	7.63	
Quality of service support	7.43	

Rating on Key Product Attributes

Range of features	7.1	
Comprehensive range of functionality	7.23	
Total cost of software/maintenance	6.71	
Appropriateness for size of law firm	7.35	
Ease of configurability	6.68	
Improves efficiency and effectiveness of Law Firm	7.43	
Apparent ease of use	7.25	
Ongoing support offered	7.58	
Reliability of system	8.08	

Overall Rating

Overall reputation of the Company	7.51	
Overall satisfaction with practice management system	6.90	

The big news from Axxia is the announcement of its new next-generation web-based product set – Axxia Dynamics – which will be formally launched at the Legal IT exhibition in Islington in February, 2006. However, as this is technically outside the scope of this review, I am going to focus on two other aspects. The first is the admirable way the company has opened up its architecture, so instead of just adding more functionality to its core systems, it is now also supporting interoperability with the growing number of third-party systems and services with which law firms must now co-exist. These include the Stamp Duty Land Tax (SDLT) requirements, the generation of PISCES-compatible XML files, investigations into the production of HIP packs and interoperability with various forms packages, integration with third-party CRM (client relationship management) packages and mobile time-recording via such devices as the Blackberry.

The second feature is the way Axxia's business intelligence offerings – these are the systems law firm partners and managers should be using to answer all those worrying questions that keep them awake at night – have matured over the past year to become truly class-leading in the legal market. Axxia now offers a full range of management information tools, from ad hoc reporting through a configurable key performance indicator (KPI) module and on to a heavy duty 'slice and dice' analysis and modelling tools. I'm not aware of any other suppliers featured in this guide who can currently offer such a complete range of products and, in fact, it is only the high-end products from suppliers catering for the largest law firms that come close to the Axxia offering, but at a much greater cost.

Product Pricing (Average cost per seat)

Axxia					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	-	£3,090	£1,850	£1,580	£1,425
Software Installation (days)	-	2	2	3	5
Project Management (days)	-	2	2	3	4
Training (days)	-	7	7	8	10
Annual Maintenance/Support Charge	-	£1,200	£4,800	£8,800	£15,000
Maintenance included in year 1	-	✓	✓	✓	✓

User Base

Axxia		1-5	6-20	21-40	41-75	75+	Top 100	
Total firms	229	Firms	13	68	53	46	26	23
Total users	21,625	Users	50	900	1,675	6,000	5,000	8,000

Suitability for size of firm

	Axxia
Solo/Very Small 1-5 Users	●
Small High Street 6-20 Users	●
Medium High Street 21-40 Users	●
Larger High Street 41-75 Users	●
Commercial and Regional Firms 75+ Users	●
City and Major Regional Firms Top 100 Firms	●



Stuart Holden - Managing Director

As the UK's largest legal technology supplier, Axxia System has spent the last three decades helping law firms of all sizes grow stronger through IT. We focus on delivering key benefits to users: improved productivity, increased profitability, improved client service and better risk management.

We understand business drivers and work to align our strategic offering to the clients' objectives, whatever their size or specialisation. In recent years, more and more small- to medium-sized firms have taken advantage of our superbly scalable solutions – the best of 'big-firm' technology distilled down for rapid deployment and ease of use within the smaller practice. A whole range of support skills and services is also available 'on tap', giving organisations access to what is effectively their own 'IT department' – without any of the accompanying overheads.

We are also committed to partnership, supporting and working with our clients over the long term. That's why we encourage users to have a direct influence on product development; why we are transparent about business and product direction; why we invest heavily in quality customer service; why we demonstrate financial stability and integrity; and why we maintain the broadest portfolio of enabling tools of any UK supplier.

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Civica is not the “new boy on the block” many readers might assume – the company has been around for much longer under the name Sanderson. Its software pedigree stretches far beyond the solicitors’ market, with a client list that includes major public sector organisations.

As would be expected from a Microsoft Gold Certified Partner, the software, Galaxy Legal, impressed the panel, and Civica’s experience in the field shows in its practical approach which is reflected in their good market research. Their core market is centred on the 50 – 100 user firm, and is one where practical IT support is essential. Systems can also be supplied on an outsourced basis which any firm too small to have strong in-house IT support may want to consider carefully, and Civica certainly has the necessary expertise to do it.

We liked the up-to-date ‘Outlook’ feel of the software, and the system incorporates nearly all the sort of good money-laundering and checking systems that firms should be using to stay compliant. The system includes the ability for management to set levels of compliance across the firm, something always considered an advantage by the panel (but often regarded as a pain by the end user). There are also standard workflows available to client firms which could considerably reduce the time needed to get up and running. The panel was pleased to see that Civica has thought about the move to scanned images, which can be seamlessly incorporated.

Although the majority of Civica’s users are outside the City, the firm is highly regarded by its clients who are clearly important to the firm. The users also like the software, which is built on a sound database. This not only means that comprehensive management information is easily available but also that, if you plan to grow, Galaxy Legal has the capacity to grow with you.

Rating on Key Company Attributes

Provides innovative solutions	6.90	
Professionalism of sales approach	7.62	
Ease of doing business	7.24	
Keeps clients up to date with changes/pressures in legal practices	7.24	
Genuine concern that firm is gaining maximum benefit from using PM system	6.86	
Quality of training offered	7.00	
Understanding of legal business	7.76	
Quality of service support	7.19	

Rating on Key Product Attributes

Range of features	7.62	
Comprehensive range of functionality	7.67	
Total cost of software/maintenance	7.29	
Appropriateness for size of law firm	7.95	
Ease of configurability	7.10	
Improves efficiency and effectiveness of Law Firm	7.81	
Apparent ease of use	7.67	
Ongoing support offered	7.76	
Reliability of system	8.19	

Overall Rating

Overall reputation of the Company	7.29	
Overall satisfaction with practice management system	7.38	

In the 12 months since Civica made its debut in this guide, the company has been rolling out new features and functionality. Two of the main ones are: the OSD (or Outlook Style Desktop), which provides a completely new user interface. This is an easy-to-use navigation and query tool, in the style of Microsoft Outlook, that permits the simple creation of customised queries over the entire Galaxy Legal database – queries can be performed over any name, client, matter or case information. The OSD also provides a facility for storing short cuts to Galaxy Legal functions and short cuts to any files accessible from the client PC on which it is used.

Secondly, there is a new and enhanced version of the original conflict search facility. This replaces the existing function and allows detailed searching of the whole Galaxy Legal database – areas that can be searched include name, person, company, client, matter and case details. This system also has an interesting add-on that, providing you have the relevant module, also allows a user to run a conflict-of-interest search on any or all of the documents they have stored on their network or system. There is also a useful option to make a conflict search mandatory before a new client or matter can be created. Interestingly, these enhancements were introduced as a result of feedback from users – and from the panel who vetted Civica for last year’s guide – so it is good to see a supplier paying attention to user comment.

Product Pricing (Average cost per seat)

GALAXY LEGAL					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	£3,800	£1,340	£1,220	£853	£746
Software Installation (days)	1	1	2	3	5
Project Management (days)	0	0	2	3	5
Training (days)	4	5	10	18	32
Annual Maintenance/Support Charge	£800	£1,200	£3,245	£3,980	£4,950
Maintenance included in year 1	✓	✓	✓	✓	✓

User Base

GALAXY LEGAL		1-5	6-20	21-40	41-75	75+	Top 100	
Total firms	41	Firms	3	14	13	6	6	3
Total users	1,943	Users	7	193	378	325	1,040	595

Suitability for size of firm

	GALAXY LEGAL
Solo/Very Small 1-5 Users	●
Small High Street 6-20 Users	●
Medium High Street 21-40 Users	●
Larger High Street 41-75 Users	●
Commercial and Regional Firms 75+ Users	●
City and Major Regional Firms Top 100 Firms	●



Pam Kendrick-Astle - Director - Legal

We are delighted to return to this year's guide, which sees us making progress in all areas of activity. Our systems are proving to be reliable, scalable and good value. Working closely with our user group, we have introduced significant new enhancements and service offerings to ease the burden of system administration. With increasing emphasis being placed on compliance and risk management issues, the flexibility of the system and its ease of use is assisting our customers to meet these challenges head-on.

Focussed on the delivery of real business benefits, Civica provides licence compliance and asset management services to some of the world's largest law firms and a strong regional presence ensures local support wherever it's needed to our extensive customer base.

As a launch partner for Microsoft® Windows 2003 and winner of the Microsoft® LAR Operational Excellence Award in 2004, Civica's partnership and technical accreditations are many and varied.

Smaller firms looking to grow or larger firms seeking increased efficiencies can benefit from Civica's combination of consulting, software and managed services to meet business objectives and maximise return on investment.

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DPS have clearly been very busy since their last inclusion on the guide. They have redeveloped One Office in .NET and taken the opportunity to provide some increasingly popular features. These include full Outlook integration and more innovative features, like floating toolbars to allow among the most flexible approach for the user interface that we have seen.

The efficiencies of .NET development and their 'one database' approach have enabled them to respond quickly to the many of emerging needs of larger law firms, including interoperability of software, flexibility and security of the technology platform, a HIP module, more sophisticated approach to risk management and more definable online services for clients.

We particularly liked their implementation of managing emails. DPS are one of the few suppliers who allow both drag-and-drop and manual depositing of emails to suit the needs of different legal practitioners. The document scanning capabilities, too, impressed us as a very practical and feature-rich solution. Basic document management is built in and the system uses the functions of Microsoft Word for more advanced functionality.

The product is modular, and has been designed with both smaller and larger practices in mind to allow for more rapid, small-scale deployment and more extensive firm-wide programmes.

Rating on Key Company Attributes

Provides innovative solutions	6.80	
Professionalism of sales approach	7.33	
Ease of doing business	7.35	
Keeps clients up to date with changes/pressures in legal practices	6.79	
Genuine concern that firm is gaining maximum benefit from using PM system	6.88	
Quality of training offered	7.41	
Understanding of legal business	7.58	
Quality of service support	6.80	

Rating on Key Product Attributes

Range of features	7.25	
Comprehensive range of functionality	7.33	
Total cost of software/maintenance	6.63	
Appropriateness for size of law firm	7.58	
Ease of configurability	6.97	
Improves efficiency and effectiveness of Law Firm	7.63	
Apparent ease of use	7.68	
Ongoing support offered	6.85	
Reliability of system	7.80	

Overall Rating

Overall reputation of the Company	6.97	
Overall satisfaction with practice management system	6.78	

After opting out of the guide last year, DPS returns for 2006 with a number of innovations to its One Office. For example, many of the functions of One Office are now available from within Microsoft Outlook, with One Office appearing as Outlook buttons that allow users to look up client, contact, matter details, write and receive emails against them, set appointments and tasks and print ledger cards including recorded time. This functionality is also available in the web-deployed version of Outlook.

DPS has also introduced case automation and remote file inception, so files can be created on the web or third-party systems and sent to the DPS case management, where the automation module incepts a file and begins to process the work required on opening the file. This may be writing a client-care letter, sending out standard terms and conditions, or other tasks. As the system will also automatically periodically chase unanswered correspondence, by sending out copies of the letters or documents to which replies are pending, and ensure incoming emails are attached to the correct matter, this is a system with a lot of potential for firms with high-volume work and fee earners who need to focus on the bigger picture, rather than be bogged down with routine administration.

Two other features to highlight are: the DPS case management system is PISCES XML compliant and, of more broader interest to not just conveyancers – although criminal practices will probably find it the most useful, the new web browser-based diary offers a simple way for firms to manage the court, duty and offices diaries of multiple fee earners, with appointments viewed by office, duty scheme or court and the system accessible from any location using web-enabled devices such as PDAs, laptops or 3G phones.

Product Pricing (Average cost per seat)

DPS SOFTWARE					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	-	£995	£600	£450	£400
Software Installation (days)	-	1	1	1	1
Project Management (days)	-	-	-	-	-
Training (days)	-	-	-	-	-
Annual Maintenance/Support Charge	20% OF THE TOTAL SOFTWARE COST				
Maintenance included in year 1	✓	✓	✓	✓	✓

User Base

DPS SOFTWARE		1-5	6-20	21-40	41-75	75+	Top 100	
Total firms	392	Firms	76	156	119	15	22	4
Total users	8,698	Users	93	2,464	2,289	820	1,682	1,350

Suitability for size of firm

	DPS Software
Solo/Very Small 1-5 Users	●
Small High Street 6-20 Users	●
Medium High Street 21-40 Users	●
Larger High Street 41-75 Users	●
Commercial and Regional Firms 75+ Users	●
City and Major Regional Firms Top 100 Firms	●



OSMAN ISMAIL - Managing Director

One Office from DPS brings together all the key functions in a practice. It has workflow modules for property purchase, sales, HIPs, Remortgage, Personal Injury, Family, Criminal and General Litigation work. Uniquely, their crime module has a full CDS and crown court billing and reporting module. The system also has a web-based diary that can be used from PDA's or mobile phones by fee-earners on the move. This is particularly useful for court work.

For flexibility, their case product can be used conventionally on an office computer local- or wide-area network, or remotely from the Internet. Their web module features a work-quoting system that is fully amendable by the practice and covers property work, including HIPs, Personal Injury and Family work. The web-based module will complete file inceptions and using the Case Robot, automatically build and prepare all initial letters and documents for printing; this is in addition to allowing clients and work-providers to track cases online.

The case system is fully integrated to Outlook™, sharing appointments, tasks, and emails. The new 'Case Robot' can send out chasing letters and emails based on tasks that have been added to a case manually, or automatically.

It is also the only product on the market that can, if required, be operated entirely from within Outlook™ and on the internet. The functions of One Office become Outlook™ buttons that allow the user to send and receive emails, make and amend appointments or tasks against cases. They can also view ledger cards or electronic files, raise cheque requisitions, record time, or amend clients' matters and contacts, all against a case.

Written in Microsoft's .Net, One Office uses a fully scalable MS SQL database as its data source and is fully tested with SQL version 5.

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This is well-specified and scalable software from a company which not only majors on delivering a feel-good factor to its purchasers, but actually delivers real practice benefits.

The panel liked Eclipse and in particular empathised with their view that they considered their users to be 'a family'.

Market research confirms that Eclipse are seen as good folk with whom to do business, and their overall satisfaction rating was second out of the firms researched for the Guide.

Eclipse scored highly with the panel for their leadership qualities. The firm encourages those firms installing their software to adhere to Law Society best practice guidelines. Where the firm does not wish to do so, Eclipse go the extra mile by warning the firm in writing that it is a risk turning off a carefully crafted risk management feature. Examples include mandatory automated conflict and money-laundering/POCA checks.

The software demonstrates further special strengths in the area of case management, including escalation of critical issues. Email too is seamlessly managed. Good and very workable arrangements are in place when it comes to support supplied by Eclipse to firms around business continuity matters.

The market research shows that users of Eclipse software are very happy with the company and the products. At the the panel interview in November 2005, the panel did feel that the time was right for the 'look and feel' of the system to be further developed. Happily, Eclipse has announced a wide range of forthcoming developments to Proclaim®, due in the 1st half of 2006, which includes 'look and feel' enhancements, further functionality extensions, and increased integration with 3rd party products. The Panel has every confidence that Eclipse will follow through on these, since they have always reliably done so in the past.

Rating on Key Company Attributes

Provides innovative solutions	8.07	
Professionalism of sales approach	8.20	
Ease of doing business	8.12	
Keeps clients up to date with changes/pressures in legal practices	8.27	
Genuine concern that firm is gaining maximum benefit from using PM system	8.12	
Quality of training offered	8.34	
Understanding of legal business	8.10	
Quality of service support	8.20	

Rating on Key Product Attributes

Range of features	8.56	
Comprehensive range of functionality	8.40	
Total cost of software/maintenance	7.76	
Appropriateness for size of law firm	8.61	
Ease of configurability	8.50	
Improves efficiency and effectiveness of Law Firm	8.56	
Apparent ease of use	8.59	
Ongoing support offered	8.68	
Reliability of system	8.56	

Overall Rating

Overall reputation of the Company	8.24	
Overall satisfaction with practice management system	8.61	

Eclipse is proving to be one of the great success stories of the legal IT world, having expanded its customer base by over 25% during the past year – and winning orders from a broad range of firms from large, established practices through to new start-ups. The company has also extended its industry alliances to offer a 'best of breed' solution, so you can now run the Eclipse case management software with either Eclipse's own Proclaim® accounts package or that of a third-party practice management systems supplier. That said, Eclipse has not ignored the need for ongoing development of its own systems over the last year. Enhancements here include adding new functionality to the core Proclaim® system (audit trails for supervisors, more flexible CRM features, improved reporting) and the introduction of new modules to the case management product roster. Eclipse can now offer conveyancing/remortgage, personal injury, debt recovery, employment, family, probate and crime, along with specific workflows for medical agencies, insurers and costs draftsmen. Inevitably, a lot of the recent focus has been on conveyancing, both with regards to the forthcoming Home Information Packs and existing third-party integrations such as PISCES, LMS and xit2.

Despite this growth, I'm glad to see Eclipse has not lost track of how important it is to keep in touch with existing customers, with recent months seeing an extension of the company's support services to ensure law firms maximise the return on their investment in software. These have included an increase in the range of training sessions and workshops to help users get the most out of Proclaim®'s functionality, as well as regular information mailings, articles, newsletters and user conferences.

Product Pricing (Average cost per seat)

PROCLAIM®					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	£2,850	£1,810	£1,499	£1,485	£1,485
Software Installation (days)	1	1	2	5	5
Project Management (days)	1	1	1	1	1
Training (days)	2	2	5	11	21
Annual Maintenance/Support Charge	-	-	-	-	-
Maintenance included in year 1	-	-	-	-	-

User Base

PROCLAIM®		1-5	6-20	21-40	41-75	75+	Top 100	
Total firms	228	Firms	70	101	26	16	11	4
Total users	5,148	Users	243	1,415	732	956	1,732	70

Suitability for size of firm

	PROCLAIM®
Solo/Very Small 1-5 Users	●
Small High Street 6-20 Users	●
Medium High Street 21-40 Users	●
Larger High Street 41-75 Users	●
Commercial and Regional Firms 75+ Users	●
City and Major Regional Firms Top 100 Firms	●



RUSSELL THOMSON - Sales Director
STEVE OUGH - Technical Director

This year's independent research for the Software Guide has again rated Eclipse Legal Systems as the number 1 supplier that end-users would most recommend to colleagues and peers. Our position as one of the very top suppliers has been further affirmed with 'Top 3' ratings in over 70% of the Law Society's research categories.

The Proclaim® Case Management solution is in use by thousands of partners, fee-earners and support staff working across a huge variety of legal services. By taking the time to ask our clients what they want – and ensuring that we meet and exceed their expectations – Proclaim® has gained an unsurpassed reputation for functionality, ease of use and flexibility.

Uniquely, Proclaim® can be implemented in a huge range of organisations: practices spread over multiple sites with hundreds of staff; high-street firms wanting a departmental solution; and new start-ups of just one or two users.

Proclaim®'s structure ensures that we can provide a case management solution to work 100% around your requirements. Whether you're looking for an 'out-of-the-box' package, or a fully tailored bespoke system, Proclaim® will meet your needs and continue to grow and evolve in line with them.

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1-5
6-20
21-40
41-75
75+
Top 100

Edgebyte's product suite, Lawbyte, is aimed squarely at the smaller firm, and such niche targeting has its advantages. There has not been the push from small firms to attach bells and whistles to software, and Edgebyte have attended to this simpler market well. But the firm seems determined not only to open up new client possibilities but also to pull their smaller clients up to the next level of technology.

Lawbyte came through as simple and unsophisticated yet homely last year, but now seems behind the times, with no ability to scan in ID documents, not terribly user-friendly email filing, no encryption possible on emails and document version control that borders on non-existent. But just when all seems lost, Edgebyte seem to have a solution.

This year Edgebyte hope to change their software dramatically, it seems, by going fully .NET and, where possible, incorporating a free version of Microsoft's SQL Server, which should not only allow them to build a Microsoft-alike, up-to-date product suite but should also mean reduced cost with increased functionality, including providing for all those missing areas.

Lawbyte as it stands, however, has been improved. Edgebyte have seriously improved its financial reporting elements, and the panel noted that, though simple, cashflow forecasting is present and will be expanded further. As in other areas, Edgebyte stood out by saying they have sent people out to clients specifically to talk about financial reporting. This kind of information seeking, when used, leads to better products.

In the realm of disaster recovery Edgebyte also show leadership and vision. Their offering is to attempt to get users who are on broadband or equivalent business Internet connections to set up automated daily backing up to a remote server. This is high-end thinking, which we hope reflects where Edgebyte will take Lawbyte in 2006.

Rating on Key Company Attributes

Provides innovative solutions	7.89	
Professionalism of sales approach	7.86	
Ease of doing business	8.53	
Keeps clients up to date with changes/pressures in legal practices	8.21	
Genuine concern that firm is gaining maximum benefit from using PM system	8.13	
Quality of training offered	7.86	
Understanding of legal business	8.64	
Quality of service support	8.47	

Rating on Key Product Attributes

Range of features	8.26	
Comprehensive range of functionality	8.00	
Total cost of software/maintenance	7.97	
Appropriateness for size of law firm	8.32	
Ease of configurability	8.03	
Improves efficiency and effectiveness of Law Firm	8.53	
Apparent ease of use	8.82	
Ongoing support offered	8.49	
Reliability of system	8.51	

Overall Rating

Overall reputation of the Company	8.30	
Overall satisfaction with practice management system	8.36	

Edgebyte's Lawbyte practice management system is one those niche products that has retained a loyal – and clearly well-satisfied, if the market research is anything to go by – user base down through the years. That said, the company has not fallen into the temptation of becoming complacent, or letting itself get left behind by the march of technology and law firm management skills. For example, the latest version of Lawbyte includes enhanced financial reporting facilities; in particular, projected cash flow analysis in addition to the more traditional historical cash flow analysis.

On the technology front, the first half of 2006 will see the release of a new Lawbyte .NET module (at the time of writing, it is still being tested) that will allow remote access over web browsers, thereby making it simpler for users to access the system when working from home, in branch offices or while out and about with only a laptop, PDA or smart-phone. And, by way of rounding off the company's latest offerings, a new support forum has been added to the Edgebyte website. This will provide a platform where issues of common interest to users can be raised and discussed, a conduit for feedback on Lawbyte products from users and a source for software updates and fixes.

Product Pricing (Average cost per seat)

LAWBYTE					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	£2,300	£780	£495	£448	£425
Software Installation (days)	1	1	1	1	1
Project Management (days)	1	1	1	1	1
Training (days)	2	2	3	4	5
Annual Maintenance/Support Charge	£552	£952	£2,495	£4,452	£5,000
Maintenance included in year 1	✓	✓	✓	✓	✓

User Base

LAWBYTE		1-5	6-20	21-40	41-75	75+	Top 100
Total firms	454	Firms	323	114	15	2	0
Total users	2,675	Users	1,404	826	352	93	0

Suitability for size of firm

	LAWBYTE
Solo/Very Small 1-5 Users	●
Small High Street 6-20 Users	●
Medium High Street 21-40 Users	●
Larger High Street 41-75 Users	●
Commercial and Regional Firms 75+ Users	●
City and Major Regional Firms Top 100 Firms	●



NIGEL BERNSTEIN - Managing Director

Founded in 1990 by a team of dedicated computer professionals with wide experience of IT in the Legal Profession, Edgebyte has built up a user base of over 400 firms. The Edgebyte team pride themselves on their Lawbyte Solicitors package, the strength of their software support and the quality of the professional back-up provided to their clients.

Lawbyte allows partners to manage their practices efficiently and effectively. Lawbyte is an extremely cost-effective way of providing partners with the key information necessary to maximise billings, improve cash flow, manage caseloads, control overheads and plan for the future.

We feel that the simplicity of the user interface is the unique selling point of Lawbyte. The system is both easy to learn and easy to use. Other advantages include the ability to build on the basic single user accounts and time recording module by adding additional modules and users as required.

We place great emphasis on customer service. It is our intention to establish a long-term relationship with each of our clients to provide them with the ongoing back-up that they require.

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1-5

6-20

21-40

41-75

JCS have expanded their software yearly, and can now offer smaller firms a comprehensive set of products and there are elements of JCS's outlook that are leading, pulling customers into next generation thinking.

JCS's Legal Ledger FiLOS is a one-stop-shop for smaller law firms, and as such there are bound to be some trade-offs. For example, they use Word for document text tracking, and their own application to oversee document version control.

Last year JCS's money laundering and conflict checks compared 'favourably' to the competition. This year, with such concentration from all firms to this end, JCS's checks seem a little lightweight. This is partly because implementation of these checks is optional, leaving it to the client to originate procedures.

Email handling has improved, with drag and drop possible for placing emails into matters. This might not sound like much, but it was surprising how many suppliers still cannot provide this ease of use. They also make it possible to deliver encrypted emails, though it seems it is still early days for smaller firms to realise this will become a simple fact of business life.

JCS score leadership points with backup and security. Last year's plus of offsite backup is still a good idea, and still under-bought. This is a shame – if there is broadband, the only thing stopping firms from using an extra backup possibility such as this is near-sightedness. Firms should make sure the backups are also backed up with any system they choose.

There is much to be done on the ground in persuading customers to adopt better IT practices in 2006. But, all in all, JCS are there for their customers, and offer a product that performs in a variety of roles.

Rating on Key Company Attributes

Provides innovative solutions	7.28	
Professionalism of sales approach	7.98	
Ease of doing business	8.40	
Keeps clients up to date with changes/pressures in legal practices	7.87	
Genuine concern that firm is gaining maximum benefit from using PM system	7.73	
Quality of training offered	7.56	
Understanding of legal business	8.08	
Quality of service support	8.28	

Rating on Key Product Attributes

Range of features	7.95	
Comprehensive range of functionality	7.89	
Total cost of software/maintenance	7.85	
Appropriateness for size of law firm	8.28	
Ease of configurability	7.59	
Improves efficiency and effectiveness of Law Firm	7.90	
Apparent ease of use	8.10	
Ongoing support offered	8.26	
Reliability of system	8.38	

Overall Rating

Overall reputation of the Company	7.67	
Overall satisfaction with practice management system	7.88	

JCS, with its Legal Ledger FiLOS suite, continues to be a popular fixture within this guide – and quite rightly so, for, rather than resting on its laurels, the company continues to roll out fresh enhancements and innovations to its product range. One of the most significant over the past 12 months has been the introduction of a 'drag & drop' function that allows any file to be attached to the current matter in the case management system. These files include emails (incoming and outgoing – complete with attachments if desired), scanned-in documents, PDFs, spreadsheets and pictures: a user can then open these documents through the case management system. Although JCS are keen to stress this will not bring about the 'paperless office', it should drastically reduce the flow of paper around the office – the 'less-paper office' in effect – and make it simpler for fee-earners to work from home, as they can have access to all the files in the case.

Reflecting the fact that most of its users are High Street practitioners with a strong private client-base, JCS has also been putting development resources into supporting e-conveyancing in its broadest sense. Recent initiatives here include integration with Searchflow, so the JCS case management system – CasMan – can process the automatic submission and return of online searches; and integration with the SDLT.co.uk system for the online submission of stamp duty land tax forms with optional payments and the return of successful receipted certificates. By way of providing a rounded solution that addresses both back- and front-office needs, the JCS Legal Ledger software also allows the disbursement incurred for using SDLT.co.uk to be posted automatically to the accounting system. And, finally, CasMan is being fully integrated with the Land Registry to allow for the submission and receipt of searches and documents.

Product Pricing (Average cost per seat)

LEGAL LEDGER FiLOS					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	£1,680	£910	£750	£720	-
Software Installation (days)	1	1	3	5	-
Project Management (days)	1	2	8	14	-
Training (days)	2	3	10	18	-
Annual Maintenance/Support Charge	£492	£1,055	£2,900	£5,530	-
Maintenance included in year 1	✓	✓	✓	✓	

User Base

LEGAL LEDGER FiLOS		1-5	6-20	21-40	41-75	75+	Top 100
Total firms	186	Firms	56	126	4	0	0
Total users	670	Users	108	477	80	0	0

Suitability for size of firm

	LEGAL LEDGER FiLOS
Solo/Very Small 1-5 Users	●
Small High Street 6-20 Users	●
Medium High Street 21-40 Users	●
Larger High Street 41-75 Users	
Commercial and Regional Firms 75+ Users	
City and Major Regional Firms Top 100 Firms	



KERRY FRATER & ROGER JACKSON - Directors

Depressed markets, increased competition, Home Information Packs, e-Conveyancing, Client extranets, pressures from referrers and institutional partners. These are some of the main drivers in a Legal sector that is changing more, and faster, than ever. Not to mention reforms to the criminal justice system and the constantly shifting goalposts of publicly funded work.

The result is that law firms have to work even more closely with their software suppliers to ensure that their systems are meeting the demands and challenges that they face.

We are pleased that, once again, the customer research demonstrates that JCS is a supplier to meet this challenge. Easy to do business with. Cost-effective, easy-to-use, scalable software. And first-class, great-value support. Focussing on training, as well as product development and innovation, we aim to ensure maximum return on an often substantial investment.

So, whether you view the drivers in the market as a threat or an opportunity, JCS is committed to developing, installing, training and supporting solutions that meet your needs. Solutions that our existing Clients are happy to recommend.

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This is Linetime's second year in the Guide, and the Leeds-based firm still looks strong. Last year's money-laundering and conflict-checking still rate highly, with checking boxes popping up in front of users demonstrating a welcome 'lead' rather than 'follow' attitude from the company.

One stand-out point in Linetime's email integration is the addition of free, open-source encryption, using OpenPGP. Linetime shows vision here – as the legal profession continues to go online for more services and rely increasingly on email, encryption of mail will become a fact of life.

Progress on the cash flow forecasting front is also evident since last year, with yearly and weekly cash flow forecasting elements now built in alongside VAT forecasting.

Linetime's MyView.NET is a portal through which users access all applications, including the wide range of modules that go to make up the firm's Liberate product set. Users can also work through Microsoft Outlook, with simple email filing and automated document production. Liberate, the overall product suite, uses a SQL Server back-end, and is built on Microsoft's .NET framework, making it integrate well with Microsoft Office products. This also means that using the system via a web browser should in the future be a natural move, and fairly future-proofs the system.

Apropos one of this year's panel bugbears, disaster recovery, Linetime pushes risk assessment as well as physical recovery – refreshingly comprehensive.

Companies in the Guide this year showed up the varying levels of leadership out there at the moment, and Linetime seem happy to lead their clients towards best practice. The product range is extensive in scope and the firm seems to understand that law firms need direction as well as technology.

Rating on Key Company Attributes

Provides innovative solutions	7.92
Professionalism of sales approach	8.08
Ease of doing business	8.23
Keeps clients up to date with changes/pressures in legal practices	8.05
Genuine concern that firm is gaining maximum benefit from using PM system	7.93
Quality of training offered	7.76
Understanding of legal business	8.48
Quality of service support	8.18

Rating on Key Product Attributes

Range of features	8.08
Comprehensive range of functionality	8.00
Total cost of software/maintenance	6.97
Appropriateness for size of law firm	8.00
Ease of configurability	7.67
Improves efficiency and effectiveness of Law Firm	8.15
Apparent ease of use	7.79
Ongoing support offered	8.21
Reliability of system	8.32

Overall Rating

Overall reputation of the Company	7.82
Overall satisfaction with practice management system	7.98

Linetime is another supplier whose software – the Liberate integrated case and practice management system – deserves to be on more invitations to tenders and law firm shortlists, particularly as the company has spent another year busily rolling out innovations – both in terms of products and services. For example, on the technology front, Linetime has been using Microsoft .NET in scenarios where it has been necessary to branch out of the main Liberate platform and/or integrate with other systems. These include the company's own ImageRouter.NET, CallRouter.NET and Liberate Express products, as well as the creation of an XML/PISCES link with Searchflow and an upcoming HIPs product development.

I was also pleased to see that on the services front, Linetime have been doing a lot of work with customer training. This has included the addition of several refresher courses to their training programme (a lot of firms overlook the fact that staff do need refresher courses to top up their skills, remind them of forgotten features and introduce them to new functions in legal software) and the improvement of facilities at their Leeds training centre. To this end, Linetime's own staff have also recently achieved accreditation under the Trainer Assessment Programme (TAP) – an industry-standard training qualification awarded by the Institute of IT Trainers – and adopted the TAP training methodology. One final note: with email now playing such an important part in law firm life, it was good to see that Linetime has just launched an out-of-the-box web and email security service to protect PCs and networks from viruses, spam and other forms of 'malware' – and you can subscribe to this service even if you are not a Linetime user.

Product Pricing (Average cost per seat)

LIBERATE					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	-	£2,163	£976	£842	£658
Software Installation (days)	-	1	1	2	2
Project Management (days)	-	1	1	2	2
Training (days)	-	6	11	16	23
Annual Maintenance/Support Charge	-	£1,140	£2,380	£4,780	£7,300
Maintenance included in year 1	-	-	-	-	-

Liberate is also available under a Managed Services Contract – all products and services provided for a fixed fee (per user per month).

User Base

LIBERATE		1-5	6-20	21-40	41-75	75+	Top 100	
Total firms	97	Firms	0	33	27	32	12	3
Total users	4,183	Users	0	308	694	1,422	1,447	312

Suitability for size of firm

	LIBERATE
Solo/Very Small 1-5 Users	
Small High Street 6-20 Users	●
Medium High Street 21-40 Users	●
Larger High Street 41-75 Users	●
Commercial and Regional Firms 75+ Users	●
City and Major Regional Firms Top 100 Firms	●



TONY KLEJNOW - Managing Director

We are proud to be Number One in the Customer Satisfaction Index in the 2006 Software Solutions Guide. The recognition reflects the emphasis that every department within Linetime places on customer service.

Liberate from Linetime is available as a complete practice-wide system or a series of departmental solutions. Built around a single SQL Server database, Liberate provides a practice with all the tools necessary to compete in today's market place whilst effectively managing their business and monitoring compliance.

Liberate provides comprehensive practice accounts management and flexible ready-to-use case management systems for a wide variety of case types. Our portfolio also includes specialist software for Debt Recovery, Contact Marketing and client web access (Liberate On-line).

Other products include:

Imagerouter.NET - control and distribution of scanned documents;

Call Router.NET - optimum handling of customer telephone calls;

MyView.NET - user access and management information portal;

Liberate Express - case and practice management functionality from within Outlook.

Linetime solutions may include hardware, system and application software and all associated services.

Linetime focus on delivering total solutions – high-quality customer service pre- and post-implementation is paramount.

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6-20

21-40

41-75

75+

Top 100

Mountain's move to .NET seems to have paid off – now that so many other vendors are jumping on the bandwagon, Mountain already have plenty of experience and, having cornered the market for barristers' systems, they have an admirable installed base and understanding of the field.

Though not completely comprehensive (it was not possible, for example, to check for conflicts by postcode), money laundering and conflict checking in Mountain's latest practice management system is thorough and unavoidable. The unavoidability of these checks is something the panel feels should be a given in any system. Of course, Mountain's product suite is not the only one to offer this set-up, but it is delivered well.

Because of the .NET backplane, integration with Outlook, Excel and Word is good. Mountain also has one of the most pleasant user interfaces we saw – uncluttered, colourful, easy to read and navigate.

Encryption is not an affordable option for solicitors' systems from Mountain (something that could be solved using the free OpenPGP), and the integration between Outlook mail and filing in matters seems clunky, though functional. Mountain offers the option of altering inbound mail subject lines to file them more efficiently in matters, but from a mail integrity standpoint, this feels like something that should be accounted for when using it.

Mountain's PMS/CMS does have digital dictation, electronic conveyancing and HIPs elements built in alongside document management. The DMS is functional but comparatively basic. Mountain also offers a set-up to allow remote/web access, though this also seemed 'in development' in some ways, such as its inability on the web side to allow documents to be sent in.

That said, it is important to note that Mountain's offering is good-looking and ticks almost all the right boxes, an accolade not to be sniffed at. With the development still going on in the new .NET systems, solicitors will find in Mountain a well-thought out suite of systems.

Rating on Key Company Attributes

Provides innovative solutions	6.98	
Professionalism of sales approach	7.53	
Ease of doing business	7.68	
Keeps clients up to date with changes/pressures in legal practices	7.68	
Genuine concern that firm is gaining maximum benefit from using PM system	7.32	
Quality of training offered	7.54	
Understanding of legal business	8.03	
Quality of service support	7.61	

Rating on Key Product Attributes

Range of features	7.63	
Comprehensive range of functionality	7.46	
Total cost of software/maintenance	7.20	
Appropriateness for size of law firm	7.90	
Ease of configurability	7.45	
Improves efficiency and effectiveness of Law Firm	7.85	
Apparent ease of use	7.80	
Ongoing support offered	7.80	
Reliability of system	7.93	

Overall Rating

Overall reputation of the Company	7.41	
Overall satisfaction with practice management system	7.59	

Its inclusion again this year means Mountain continues to hold the distinction of being the only supplier to have retained a full entry in every edition of this guide since its inception in 1998. However, in terms of what is new this year, it is gratifying to see that Mountain is effectively maintaining a dual-product development strategy, catering for not only the users of its new .NET product – as well as its older FoxPro system, who may currently have no plans or need to upgrade – but also for the differing needs of various types of practice. So, for example, for its traditional core High Street market, Mountain has developed a module to allow firms to create HIPs and output them securely to the internet for estate agents and clients to download. In addition, the company is working closely with the Land Registry to ensure its systems allow firms to compete effectively in the new and inescapable world of e-conveyancing.

At the same time, Mountain has also launched a three-dimensional business analyser that provides a multifaceted way of presenting information in data 'cubes' utilising the Excel spreadsheet package, so practices can see trends in performance, analyse their business as a whole and drill down into any areas of data. Interestingly, while this type of in-depth analysis is more common in larger firms, Mountain is offering it to both its .NET and FoxPro sites – so smaller firms need not miss out if they want this kind of functionality. Also worth mentioning is that Mountain has completed a full integration with Microsoft Outlook, so that users now have the option of running all the company's .NET products from within that application.

Product Pricing (Average cost per seat)

MOUNTAIN SOFTWARE PMS & SOLICITORS ACCOUNTS & TIME					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	£2,745	£2,226	£1,113	£915	£791
Software Installation (days)	-	1	1	2	3
Project Management (days)	-	1	2	4	6
Training (days)	2	4	9	14	22
Annual Maintenance/Support Charge	£850	£1,360	£2,310	£3,765	£6,270
Maintenance included in year 1	✓	✓	✓	✓	✓

User Base

PMS & SOLICITORS ACCOUNTS & TIME		1-5	6-20	21-40	41-75	75+	Top 100	
Total firms	488	Firms	203	143	82	49	11	0
Total users	6,972	Users	542	1,396	1,771	2,448	815	0

Suitability for size of firm

	MOUNTAIN SOFTWARE PMS & SOLICITORS ACCOUNTS & TIME
Solo/Very Small 1-5 Users	●
Small High Street 6-20 Users	●
Medium High Street 21-40 Users	●
Larger High Street 41-75 Users	●
Commercial and Regional Firms 75+ Users	●
City and Major Regional Firms Top 100 Firms	



STEVE KENDRICK - Sales Director

As a Microsoft Gold Partner, we continue to roll out our new .net software to existing and new customers. Utilising SQL greatly enhances the performance, user experience and scalability of our software solutions that can operate entirely from within Microsoft Outlook. We offer a wide range of case management modules, including internet-based solutions and our products are highly regarded for LSC/CDS compatibility. New innovations include a HIPs module, substantial enhancements in client relationship/document management and integration with Nflow digital dictation. A new three-dimensional business analyser provides even greater integration analysis within the Practice.

Mountain Software is the only software house to have been included since 1998 in every issue of the Law Society's Software Solutions Guide. Supplying Solicitors with systems since 1980, market research shows that our clients are the most loyal and are the most likely to upgrade with Mountain Software.

With over 750 solicitors' practices, 300 barristers' chambers and 110 coroners' jurisdictions as clients, coupled with an exciting range of new products and solutions designed to maximise the potential of your practice, why not find out what makes Mountain Software a unique supplier to all aspects of the legal profession.

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Now a regular in the Guide, OPSIS continue to make improvements to their accounting and case management systems, which can still be purchased separately.

OP SIS now offer an SQL version of the software with will allow them to compete for business in the bigger firms.

Money laundering checks and procedures are well implemented in the case management system and OPSIS now offer a very comprehensive Money Laundering Protection system (AML Custodian) as a stand-alone application for those without adequate money laundering procedures. Functionally very rich, the package does not however share data with the other applications.

Other improvements include much improved fee earner performance reporting, including the ability to monitor a wide range of indicators for each fee earner and report customization. In other respects the package demonstrated has not advanced substantially although a number of small ease-of-use changes have been made to aid fee earner productivity. The handling of emails and their integration into the matter is automated from within MS Outlook and document version control remains adequate. OPSIS'S market research results continue to be mid-range however the level of client commitment was very strong.

One of few suppliers still fully supporting the sole practitioner market, OPSIS still supply their Millenium Solo product, a solid and reliable performer meeting all the needs of users in this market.

Rating on Key Company Attributes

Provides innovative solutions	7.11	
Professionalism of sales approach	7.95	
Ease of doing business	8.03	
Keeps clients up to date with changes/pressures in legal practices	7.38	
Genuine concern that firm is gaining maximum benefit from using PM system	6.80	
Quality of training offered	7.23	
Understanding of legal business	7.90	
Quality of service support	8.10	

Rating on Key Product Attributes

Range of features	7.59	
Comprehensive range of functionality	7.27	
Total cost of software/maintenance	7.41	
Appropriateness for size of law firm	8.05	
Ease of configurability	7.53	
Improves efficiency and effectiveness of Law Firm	7.74	
Apparent ease of use	7.83	
Ongoing support offered	7.87	
Reliability of system	8.17	

Overall Rating

Overall reputation of the Company	7.45	
Overall satisfaction with practice management system	7.37	

While OPSIS continues to offer and support its Millennium Accounts single-users accounts system for sole practitioners/very small firms and SPS Small Practice System for up to five users: recognising that small firms and start-ups may grow rapidly, the company can now also offer Microsoft SQL Server versions of all its key products to meet the needs of larger, multi-branch firms. Another new development – which should appeal to firms of all sizes – has been a major overhaul of the OPSIS reports module. This now offers a useful selection of management and WIP reports, including an analysis of fee-earner performance versus budget. Users also have the facility to customise and edit existing reports to suit their exact requirements and then export them into Word, Excel or PDF file formats.

In terms of new products, OPSIS has taken the bold initiative of recently launching OPSIS AML Custodian – a stand-alone anti-money-laundering (AML) compliance system that can be used by any law firm, not just existing OPSIS sites (in fact, users of the OPSIS case management system already have the option of an integrated AML module). Features of AML Custodian include: prompts for the correct form of client ID verification; automatic checks against the Bank of England consolidated sanctions list; storage of scanned images of evidence; the automatic creation of email warning to MLRO and the automatic production of NCIS reporting forms. Given that the system is being sold for an all-in price of £999 for a 5-user licence plus scanner, there really is no excuse for not being compliant.

Product Pricing (Average cost per seat)

MILLENNIUM ACCOUNTS					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	£1,740	£1,215	£638	£585	£550
Software Installation (days)	0	1	2	3	5
Project Management (days)	0	1	1	1	1
Training (days)	1	3	5	11	20
Annual Maintenance/Support Charge	£480	£850	£1,600	£2,600	£4,350
Maintenance included in year 1	✓	✓	✓	✓	✓

PRACTICE MANAGEMENT SYSTEM					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	£3,800	£1,340	£1,220	£853	£746
Software Installation (days)	1	1	2	3	5
Project Management (days)	0	0	2	3	5
Training (days)	4	5	10	18	32
Annual Maintenance/Support Charge	£800	£1,200	£3,245	£3,980	£4,950
Maintenance included in year 1	✓	✓	✓	✓	✓

AML CUSTODIAN					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	£999	£200	£100	£50	£34
Software Installation (days)	0	0	1	1	1
Project Management (days)	0	0	0	0	0
Training (days)			Manual Provided		
Annual Maintenance/Support Charge	-	-	-	-	-
Maintenance included in year 1	-	-	-	-	-

User Base

MILLENNIUM ACCOUNTS		1-5	6-20	21-40	41-75	75+	Top 100
Total firms	287	Firms 225	54	4	2	2	0
Total users	1,507	Users 431	495	114	106	361	0
PRACTICE MANAGEMENT SYSTEM		1-5	6-20	21-40	41-75	75+	Top 100
Total firms	484	Firms 28	450	6	0	0	0
Total users	284	Users 89	34	161	0	0	0

Suitability for size of firm

	MILLENNIUM ACCOUNTS	PMS
Solo/Very Small 1-5 Users	●	●
Small High Street 6-20 Users	●	●
Medium High Street 21-40 Users	●	●
Larger High Street 41-75 Users	●	●
Commercial and Regional Firms 75+ Users	●	●
City and Major Regional Firms Top 100 Firms		



ELLA JENKINS - General Manager

Investing in a new IT system is a major business decision for any law firm and choosing the right software supplier for your firm is also of equal importance. Once the initial sales negotiation is over, you need to be assured of continuing service and support for the years to come.

The customer satisfaction survey, conducted for this Software Solutions Guide, rated OPSIS amongst the top 3 suppliers with the most committed and loyal customer base and in the top 5 for customer satisfaction. These results reflect our belief in building long-term relationships with customers and taking pride in providing excellent customer service and support.

Right from the start, you will find OPSIS an easy company to do business with. Our professional sales team have a no-hidden-costs approach to pricing the system appropriate for your firm's size and requirements. A dedicated Project Manager is then appointed to coordinate all aspects of the implementation, from installation through to "going live", and our friendly technical and helpdesk staff will offer ongoing help and support.

Whether you are a sole practitioner, a small start-up firm or a large multi-site practice, by choosing OPSIS as your software supplier, you can be assured of making a good decision.

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1-5

6-20

21-40

41-75

75+

Quill continues to offer a popular bureau service for firms wishing to outsource their cashiering and make use of accounts, time recording and database software.

Once accounts information has been entered by Quill's legal cashiers, up-to-date data can be accessed by fee earners and others for financial and management reporting. A link with Opsis for the provision of case management tools means that Quill can be part of a fully rounded practice management solution.

Quill tell us that their product continues to sell well this year to sole practitioners – particularly new start-ups – but that it is increasingly appealing to larger clients who are perhaps identifying potential savings they could make by outsourcing the bookkeeping function, such as avoiding upgrading their networks and elevating employment issues by dealing with a supplier rather than in-house staff.

A new development is the introduction of 'e-chits'. Whereas as in the past Quill's clients would post paper chits (and indeed some still do), most now send them electronically.

A .NET offering, Pinpoint.Interactive, is scheduled for the first months of 2006. Quill claim that the browser-based interface will make it more accessible while personalisation features will appeal to fee earners who want a home web page featuring key statistics on their performance: number of matters opened, unpaid bills and top clients.

Quill welcomed this year's more detailed market research, but the research company may not have fully appreciated the nature of Quill's outsourced offering, so skewing some of their findings. Even so, overall satisfaction with the system was rated above the average in what may generally be considered a strong field.

Rating on Key Company Attributes

Provides innovative solutions	6.78	
Professionalism of sales approach	7.74	
Ease of doing business	8.13	
Keeps clients up to date with changes/pressures in legal practices	6.73	
Genuine concern that firm is gaining maximum benefit from using PM system	7.62	
Quality of training offered	7.15	
Understanding of legal business	7.84	
Quality of service support	8.08	

Rating on Key Product Attributes

Range of features	7.83	
Comprehensive range of functionality	7.24	
Total cost of software/maintenance	7.18	
Appropriateness for size of law firm	8.08	
Ease of configurability	7.50	
Improves efficiency and effectiveness of Law Firm	7.54	
Apparent ease of use	8.05	
Ongoing support offered	7.85	
Reliability of system	7.75	

Overall Rating

Overall reputation of the Company	7.72	
Overall satisfaction with practice management system	7.85	

At the risk of sounding boring, as I say this every year, I really think that more firms should seriously consider outsourcing their bookkeeping operations to a service such as Quill's PINpoint accounting bureau. In smaller firms and start-ups, any available funds would be better used on fee-earners and practice development rather than on cashiers and back-office overheads. This year, the argument becomes even stronger, as PINpoint is not only teaming up with case management systems suppliers – Opsis, also featured in this guide, is already on board – but has also moved into document outsourcing with a link-up with a digital dictation transcription services provider and the promise of documents being turned around within 45 minutes.

If you are still not convinced by the merits of outsourcing, PINpoint's latest enhancements include an e-chit and e-cheque system that allows a fee-earner to electronically submit a chit, raise an authorisation to produce a cheque and check the balances on the client account ledger card, thereby reducing any reliance on DX or postal communications, as well as cutting the timescale between the submission of a chit and posting the transaction. Finally, during the course of this coming Spring, Quill will be rolling out a new .NET product – PINpoint Interactive – that will provide access to the service via a web browser. As with some of the other .NET initiatives mentioned in this guide, this will allow users to access the PINpoint service from anywhere – including home and branch offices – and export financial reports to Excel.

Product Pricing (Average cost per seat)

PINPOINT ACCOUNTING BUREAU					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)*</i>	£370	£625	£1,680	£3,254	-
Software Installation (days)	-	-	-	-	-
Project Management (days)	-	-	1	1	-
Training (days)	1	1	1	1	-
Annual Maintenance/Support Charge	£0	£0	£0	£0	-
Maintenance included in year 1	✓	✓	✓	✓	

* The cost per seat illustrations above are actually monthly charges for the PINpoint service and include transfer of opening trail balance information, on site training and remote installation. The number of users relates to the number of fee-earners within the practice. There are no annual software maintenance fees for the PINpoint service. The PINpoint monthly charge is based upon the size of practice and type of work undertaken. The above figures are assuming a high street practice performing both contentious and non-contentious private work. The PINpoint service can equally accommodate the needs of publicly funded and niche practices.

User Base

PINPOINT ACCOUNTING BUREAU		1-5	6-20	21-40	41-75	75+	Top 100
Total firms	134	Firms	25	92	17	0	0
Total users	1,457	Users	112	909	436	0	0

Suitability for size of firm

	PINPOINT ACCOUNTING BUREAU
Solo/Very Small 1-5 Users	●
Small High Street 6-20 Users	●
Medium High Street 21-40 Users	●
Larger High Street 41-75 Users	
Commercial and Regional Firms 75+ Users	
City and Major Regional Firms Top 100 Firms	



TONY LANDES - Managing Director

Less than 10 years after its launch, PINpoint has grown into the biggest legal bureau service of its kind, with all types of firms recognising the financial and administrative benefits of outsourcing their bookkeeping and software requirements. This professionally run service ensures up-to-date ledgers, legal aid and management reporting, solves your accounts, time recording and risk management requirements such as conflicts of interest and money laundering. It includes database features such as diary dates, wills, deeds and experts registers... all this without the need to invest in dedicated accounts staff or expensive new infrastructure.

Now, PINpoint's new "Web-based" concept has responded to demand with a secure, interactive service from any location. This high-tech development offers PC users Broadband connectivity, using standard Internet Browser Technology. E-chits and E-cheques are spearheading this innovation, with more invaluable features to be added in the future.

Part of Quill Group, PINpoint's knowledge of the legal marketplace, and the positive feedback from users of the Web-based service, confirm it as the ideal solution for all sizes and types of firms, including new start-ups and breakaway practices. With firms under increasing pressure to adopt quality standards, they should expect the same from suppliers. Quill's Investor-in-People Accreditation, DTI SMART Award and Law Society SSG Endorsement all demonstrate our commitment to quality.

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SOS continues to impress the panel with its highly functional, well-designed software. Their understanding of legal business allows them to punch above their weight and provide some of the latest insights in managing the performance of larger practices.

These insights include human resource management (HRM) features, customer relationship management (CRM) and business intelligence capabilities (the latter delivered through Microsoft Excel) that enable a more balanced view of the performance of the practice throughout a firm.

Their software has been redeveloped in .NET as promised, and they have integrated the product with Microsoft Outlook. This is a recognition of how and where many fee earners and other staff work in medium-size and larger law firms, and provides a very flexible and cost effective technology platform. They have continued with their integration with Visualfiles to provide more sophisticated case management capability.

SOS's accounting system remains one of the strongest in the market, with excellent in-built reporting features, including budget variance analysis.

They have extended the already very well-thought out processes for conflict and money laundering checks with a generic workflow ability bundled with their fee earner desktop. This has the flexibility to search the entire data structure, including external sources, required to meet current and future regulations.

This host of features, cross-functional working capability, and flexible technology platform will require significant planning and resources to ensure effective deployment.

Rating on Key Company Attributes

Provides innovative solutions	7.38
Professionalism of sales approach	8.05
Ease of doing business	8.08
Keeps clients up to date with changes/pressures in legal practices	7.65
Genuine concern that firm is gaining maximum benefit from using PM system	7.46
Quality of training offered	7.60
Understanding of legal business	8.33
Quality of service support	7.93

Rating on Key Product Attributes

Range of features	7.90
Comprehensive range of functionality	8.05
Total cost of software/maintenance	7.16
Appropriateness for size of law firm	8.10
Ease of configurability	7.60
Improves efficiency and effectiveness of Law Firm	8.10
Apparent ease of use	7.85
Ongoing support offered	7.85
Reliability of system	8.58

Overall Rating

Overall reputation of the Company	8.23
Overall satisfaction with practice management system	7.95

The big news from SOS is the completion of the development and the launch of the company's all-new .NET practice management system, SOS Connect. There is not enough space to go into all the benefits of this new .NET system, but along with giving personal productivity benefits, such as giving users the option of having Microsoft Outlook, rather than Connect's own desktop, as the desktop interface, I think a lot of firms will appreciate the communications benefits inherent within the system. For example, multi-branch firms no longer need expensive leased lines linking their offices in order to roll out the software across the entire firm. Instead, all they need is an internet connection – and, of course, this can also be used by individual fee earners to link into the system from home or abroad via a laptop.

Along with .NET, SOS has also been focussing on one of the other big issues all firms face, namely management information/business intelligence reporting, and have addressed it with their new OLAP (online analytical processing) application. This allows managers and other staff to drill down through data to analyse figures, identify trends and uncover problems – and, from there, start managing a firm on a sound business footing. For firms that want a future, such systems are a must and I'm pleased to see OLAP is available to users of both the Connect system and the older – but still perfectly good – SOS Practice Manager software. Finally, SOS has addressed the issue of online security – which many firms do not take as seriously as they should – by teaming up with Message Labs to offer a comprehensive, subscription-based email management, security and content control solution.

Product Pricing (Average cost per seat)

SOS CONNECT					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	-	-	£1,800	£1,400	£1,200
Software Installation (days)	-	-	1	2	2
Project Management (days)	-	-	3	3	4
Training (days)	-	-	16	20	22
Annual Maintenance/Support Charge	-	-	£3,800	£6,520	£11,350
Maintenance included in year 1	-	-	-	-	-

User Base

SOS		1-5	6-20	21-40	41-75	75+	Top 100	
Total firms	425	Firms	0	22	217	136	44	6
Total users	12,305	Users	0	125	4,100	4,080	3,500	500

Suitability for size of firm

	SOS Connect
Solo/Very Small 1-5 Users	
Small High Street 6-20 Users	●
Medium High Street 21-40 Users	●
Larger High Street 41-75 Users	●
Commercial and Regional Firms 75+ Users	●
City and Major Regional Firms Top 100 Firms	●



MICHAEL PLATT - Managing Director

SOS award-winning software is now in use in over 400 law firms throughout the UK – from high street practices through to top 100 firms.

Over the last three years, we have been developing our new software under the latest .Net/Web Services platform within an optional Outlook front end, which will deliver real commercial benefits to law firms.

Quite simply, our latest software can be accessed wherever there is internet access (at home, overseas and even on the move). Alternatively, a fee-earner may choose to operate our software off-line. The documents, time logs, etc., are then uploaded and synchronized the next time the fee-earner is linked to the office network.

SOS has coupled its new .Net software with the very latest email and document encryption service to ensure you can communicate with your clients electronically in complete confidence.

A powerful new OLAP (on-line analytical processing) reporting tool completes the comprehensive new product line-up from SOS in 2006.

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Spring 2005 saw TFB release Partner for Windows 2.27, which has already been implemented across a wide number of user sites. The enhancement is quite radical from the previous version but for those practices which take risk management seriously it is a must. It is free to existing users as are all their upgrades but requires investment in training.

TFB are keenly aware of the professions needs. Although previously rated as providing adequate support our market research has shown that their ratings have soared this year which is quite an achievement given their growth strategy.

The panel generally believe that in some processes such as Anti-Money Laundering checks, some steps should be mandatory and TFB take this on board.

In terms of managing risk, one helpful tool (TaskCentre), enables alerts to be escalated where essential activities, such as undertakings, have not taken place.

A drag and drop facility enables emails to be put into the case management system with the minimum of clicks thus making it very user friendly.

TFB are also well advanced with archiving by scanning and this is an area where practices can save a lot of money on file storage for a comparatively small investment.

In relation to business continuity as with most suppliers, their immediate thoughts are back up and recovery. TFB are going beyond that and are able to help their customers with advice and support with off site data storage. They recommend that the best means to get the business up and running is by switching to a "never fail" alternative server on another site.

We also saw good offerings for new requirements under the solicitors' rules such as cash flow forecasts which demonstrate that every effort is being made to provide the complete practice management system.

Rating on Key Company Attributes

Provides innovative solutions	7.83	
Professionalism of sales approach	7.67	
Ease of doing business	7.80	
Keeps clients up to date with changes/pressures in legal practices	8.08	
Genuine concern that firm is gaining maximum benefit from using PM system	7.93	
Quality of training offered	7.98	
Understanding of legal business	8.30	
Quality of service support	8.15	

Rating on Key Product Attributes

Range of features	8.10	
Comprehensive range of functionality	8.13	
Total cost of software/maintenance	7.26	
Appropriateness for size of law firm	8.05	
Ease of configurability	7.79	
Improves efficiency and effectiveness of Law Firm	8.21	
Apparent ease of use	8.08	
Ongoing support offered	8.00	
Reliability of system	8.44	

Overall Rating

Overall reputation of the Company	7.75	
Overall satisfaction with practice management system	7.93	

TFB has continued its policy of offering a 'best of both worlds' solution that combines the benefits of its Partner for Windows integrated practice and case management system with the flexibility of 'best of breed' software. Last year's guide saw the introduction of third-party digital dictation and redlining software, while this year the new add-on options available include integration with telephony services (or CTI), email services and mobile computing via the very popular BlackBerry device.

These innovations have not, however, distracted TFB from keeping its eye on the ball with regards to both user support services or its core software. As the market research data shows, TFB has hugely improved its customer satisfaction rating over the past 12 months, coming joint top this year, as well as scoring far higher in many of the other categories. Among the changes helping here has been the online support website, which has prompted a lively debate among TFB users. On the product front, Partner for Windows has not only had a complete makeover in terms of its user interface, but there has also been the introduction of new CRM facilities, which should be of interest to firms specialising in corporate commercial work, while the new public funding module is one of the most comprehensive products available to deal with all aspects of LSC civil & criminal time and billing. Finally, TFB's Legal Desktop initiative – a small-practice edition of its software – also means the system is now a viable option for smaller firms looking for a solution that can grow with them.

Product Pricing (Average cost per seat)

PARTNER FOR WINDOWS					
Number of Users	1	5	20	40	75
Cost per Seat <i>(includes)</i>	£950	£2,300	£1,600	£1,300	£1,150
Software Installation (days)	0	1	2	6	8
Project Management (days)	0	1	3	5	7
Training (days)	1	5	9	16	30
Annual Maintenance/Support Charge	£300	£600	£2,120	£4,000	£6,300
Maintenance included in year 1	✓				

User Base

PARTNER FOR WINDOWS		1-5	6-20	21-40	41-75	75+	Top 100	
Total firms	353	Firms	12	111	118	75	35	2
Total users	15,000	Users	36	1,332	4,572	4,510	3,900	650

Suitability for size of firm

	PARTNER FOR WINDOWS
Solo/Very Small 1-5 Users	●
Small High Street 6-20 Users	●
Medium High Street 21-40 Users	●
Larger High Street 41-75 Users	●
Commercial and Regional Firms 75+ Users	●
City and Major Regional Firms Top 100 Firms	●



SIMON HILL - Managing Director

Established in 1976, TFB's name has become synonymous with the provision of the most advanced software solutions available to the legal profession. TFB's market strength is accredited to its flagship case and practice management system, Partner for Windows and the versatility of its design, which can be tailored to each individual firm's requirements. This, combined with the company's dedication to customer care and range of additional products, sets TFB apart from other suppliers and reinforces their market strength.

The latest version of Partner for Windows was launched at the beginning of 2005 and since its release, v2.27 has enabled our client base to take full advantage of many more facets which the solution has to offer, such as CRM, Marketing and LSC work. The fact that some of the key enhancements of Partner for Windows have emerged as a direct result of user input is just one indication of TFB's desire to work alongside our users. For us, when a new system is installed, it is just the beginning of what we hope will be a long and fruitful relationship which grows and develops in accordance with our clients' needs.

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1-5

6-20

21-40

41-75

75+

Top 100

ACCESS Practice Management
ALPHALAW AlphaLaw Esprit
ALPHALAW AlphaLaw Vantage
AXXIA Practice Management
CIVICA Practice Management
DPS Galaxy Legal
ECLIPSE DPS Software
EDGEBYTE Proclaim®
JCS Legal Ledger FILOS
MOUNTAIN Mountain Software PMS
OPSIS Practice Management System
OPSIS Millennium Accounts
OPSIS Liberate
TFB Partner for Windows
SOS Connect

ACCOUNTS

Fully compliant with the Solicitors' Accounts Rules	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Accounting reports pack	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automatic client account interest calculation	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automatic deposit account interest calculation	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Credit control	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Budgeting functions	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Distinguish incurred, billed and not billed disbursements	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated cheque printing	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated cheque requests	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated posting slips	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated bank reconciliation	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Multi-currency	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Asset register	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Purchase ledger	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Direct billing	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

MANAGEMENT REPORTS AND FEE EARNER PRODUCTIVITY TOOLS

Predefined standard management reports	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Key performance indicator reports	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Fee earner WIP reports	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Fee earner time records	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Fee earner time gaps shown	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Fee earner time written off reports	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Fee earner target reports	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Fee earner unbilled time and disbursements	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Fee earner critical tasks and dates	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated attendance notes	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Quick client setup tools	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

TIME RECORDING

Time sheet entry	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Clock/timer facilities	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Time recording reports	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Time rates	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Matter budget management	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated time recording for tasks	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Time management	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Billing guides	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated phone tools TAPI	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

CLIENT MATTER DATABASE FUNCTIONALITY

Automated conflict checking	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Full conflict search across selected data fields	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Limitation dates	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

	ACCESS Practice Management	ALPHALAW AlphaLaw Evolution	ALPHALAW AlphaLaw Esprit	AXXIA AlphaLaw Vantage	CIVICA Practice Management	DPS Galaxy Legal	ECLIPSE DPS Software	EDGEBYTE Proclaim®	JCS Legal Ledger	LINETIME Lawbyte	MOUNTAIN Mountain Software FilLOS	OPSS Practice Management PMS	OPSS Millennium Accounts	TFB Partner for Windows	SOS Connect
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Matter duplication checking	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Experts register	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Audit trail for conflict checks		•	•	•	•	•	•	•	•	•	•	•	•	•	•
Anti-money laundering checks	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Budget limit settings	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Credit checking	•	•			•	•	•	•	•	•	•	•	•	•	•
Undertaking recording	•	•		•	•	•	•	•	•	•	•	•	•	•	•
Matter locking	•	•			•	•	•	•			•	•	•	•	•
Risk management banding		•	•	•	•	•	•	•			•	•	•		•
Risk management commentary		•	•	•	•	•	•	•			•	•	•	•	•
Risk management supervision tools		•		•	•	•	•	•			•	•	•	•	•
Create automated checklists/workflows	•	•		•	•	•	•	•	•	•	•	•	•	•	•
Matter planning tools	•	•		•	•	•	•	•			•	•	•	•	•
Critical notes recording facility	•	•	•	•	•	•	•	•			•	•	•	•	•
Locking transaction/matter history	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Wills and deeds register	•	•		•	•	•	•	•	•	•	•	•	•	•	•
Single central database for all contacts	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Multiple clients on matter	•	•	•	•	•	•	•	•			•	•	•	•	•
Unlimited contacts on a matter	•	•	•	•	•	•	•	•			•	•	•	•	•
Relationship definition	•	•	•	•		•	•	•			•	•	•	•	•
Full search/sort facilities	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

DOCUMENT PRODUCTION

Automated document production for single client/contact	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated document production for range of clients/contacts	•	•	•	•	•	•	•	•	•	•	•	•		•	•
Automated multiple document production	•	•		•	•	•	•	•			•	•	•	•	•
Version control of documents	•	•		•	•	•	•	•	•	•	•	•	•	•	•
Ease of document retrieval from within Word	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Form integration	•	•		•	•	•	•	•	•	•	•	•	•	•	•
Free text searching	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Write back from documents to database		•			•	•	•	•			•	•	•		•
“Intelligent document” facilities	•	•		•	•	•	•	•	•	•	•	•	•	•	•
Document Assembly	•	•		•	•	•	•	•	•	•	•	•	•	•	•

EMAIL FUNCTIONALITY

Email inbox integration	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Outgoing email recorded in transaction history	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated email time recording	•	•		•	•	•	•	•	•	•	•	•	•	•	•
Full sent email storage	•	•		•	•	•	•	•	•	•	•	•	•	•	•
Original email viewing	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated email routing directly to a matter file	•	•				•	•				•	•		•	•
Email encryption facilities		•		•	•	•	•	•			•			•	•
Outlook integration	•	•	•	•	•	•	•	•	•		•	•	•	•	•

ACCESS Practice Management
 ALPHALAW AlphaLaw
 AXIA AlphaLaw Esprit
 CIVICA Practice Management
 DPS Galaxy Legal
 ECLIPSE DPS Software
 EDGEBYTE Proclaim®
 JCS Legal Ledger
 LINETIME Lawbyte
 MOUNTAIN Mountain Software
 OPSIS Millennium Accounts
 OPSIS Practice Management
 OPSIS Liberate
 TFB Partner for Windows
 SOS Connect

	ACCESS	ALPHALAW	AXIA	CIVICA	DPS	ECLIPSE	EDGEBYTE	JCS	LINETIME	MOUNTAIN	OPSIS	OPSIS	OPSIS	TFB	SOS
DIARY AND SCHEDULING															
Proactive date management (e.g. prompts for missed dates)	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Firm wide diaries	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Individual diary access	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Separate task and appointment management		•		•	•	•	•	•	•	•	•	•		•	•
Resource diaries		•		•	•		•	•	•	•	•	•		•	•
Escalation of tasks/to do items to supervisor	•	•	•	•	•	•	•	•		•	•	•		•	•
Proactive scheduling	•	•		•	•	•	•	•		•	•	•		•	•
CUSTOMISATION AND VIEWS															
Tools for customised workflow development	•	•		•	•	•	•	•	•	•	•	•		•	•
Tools for customising matter types	•	•	•	•	•	•	•	•	•	•	•	•		•	•
Tools for customising data (user defined fields)	•	•		•	•	•	•	•		•	•	•		•	•
Tools for customising user help screens	•	•		•	•	•	•	•		•	•	•		•	•
Document view	•	•	•	•	•	•	•	•	•	•	•	•		•	•
Transaction history view	•	•	•	•	•	•	•	•	•	•	•	•		•	•
Web browser enablement		•			•	•	•			•	•	•		•	•
Accessible from within Word	•	•			•	•	•			•	•	•		•	•
Accessible from within Outlook	•	•			•	•	•			•	•	•		•	•
Contact and relationship views	•	•	•	•	•	•	•	•		•	•	•		•	•
THIRD PARTY DATA TRANSFER ONLINE AND SYSTEMS ADMINISTRATION															
Ability to transfer data to third party systems online	•	•		•	•	•	•	•	•	•	•	•		•	•
NLIS integration	•	•		•	•	•	•	•	•	•	•	•		•	•
Legal Services Commission e-lodgement	•	•		•		•	•		•	•	•	•	•	•	•
STARS integration		•		•	•	•	•	•		•	•	•		•	•
Adding/Amending users	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Systems administration security	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Systems administration audit trails	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
LEGAL AID AND MISCELLANEOUS															
Legal Aid - civil contract management reports	•	•	•	•	•		•	•	•	•	•	•	•	•	•
Legal Aid - criminal contract management	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Use through devices (e.g. Personal Digital Assistants)				•		•				•	•	•	•	•	•
Integrated voice recognition		•			•	•	•	•	•	•	•			•	
Data replication	•	•		•	•	•	•	•		•	•	•		•	•
Client extranet upload facilities	•	•		•	•	•	•	•		•	•	•		•	•
Automated SMS text messaging	•	•			•	•	•	•		•	•	•		•	•
Project management tools		•		•	•	•	•			•				•	•

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