

# Law Office in the Cloud™



How and why you should move  
your law practice to a Private Cloud

BY DENNIS DIMKA



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### About the Author

In 2012, Dennis Dimka, Chief Executive Officer of Uptime Legal, made a decision that has brought unparalleled results for the company and its clients. That decision was simple, Uptime would focus exclusively on providing cloud services to small and mid-size law firms. Why take such a risk? He believed law firms required a unique set of services and product commitment. He was right.

Today, Uptime provides hosting, software, and support to more than 500 law firms and thousands of legal professionals in North America.

Uptime is truly agnostic in its approach to legal software. The experience gained from working with leading legal applications is significant. This eBook is dedicated to all those firms struggling to understand how best to approach cloud computing and evaluate their choices.

*“ Law firms don’t want to manage servers anymore. There’s no joy in it, just headaches and heartache. ”*

*—TechnoLawyer*



# Chapter 1

## The purpose of this eBook

is to assist decision makers at small and mid-sized law firms who may be considering a move to the cloud. There are many questions to be answered:

- What are the benefits of moving to the cloud?

- What are the components of cloud computing?
- What are the differences between web-based and cloud-based applications?
- Can on-premises applications be hosted in the cloud?
- What practice management applications should I consider?

The practice management software applications reviewed here are mature, best-of-breed products that

have all been deployed successfully in thousands of law firms. When these practice *management* applications are coupled with email and documents in a Private Cloud environment, law firms achieve true mobility and freedom from IT infrastructure costs and concerns.

Eliminating technology concerns and roadblocks frees legal professionals to focus on their client's cases; a true win-win.



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# Chapter 2

## Law Office in the Cloud: The Next Evolutionary Phase of Cloud Computing for Law Firms

Law Office in the Cloud is the first holistic approach to cloud-based technology for law firms. It is the means by which a law firm can have its entire practice in the cloud, leveraging the benefits of cloud computing completely.



**Cloud Computing affords law firms mobility and flexibility**

### **A Complete Law Office in the Cloud**

There's more to the cloud than just web apps and document storage. You don't have to sacrifice functionality to take advantage of the cloud.

Law Office in the Cloud is a suite of cloud services enabling law firms to run their entire practices in the cloud: their legal applications, their documents, and their email. They can access their entire practices anytime, anywhere,



and from any device. And, all without onsite servers or outside IT support.

A Law Office in the Cloud includes:

- Application hosting and support: Practice management, billing, and more
- Cloud storage for your firm's documents, files, and folders
- Microsoft Office Suite + Skype instant messaging
- Hosted Exchange email
- Local computer antivirus protection
- Built-in security, backups, and disaster recovery
- Unlimited support: for the cloud platform and the law firm's own computers, laptops, mobile devices, printers, and scanners

In addition to the standard services that every law firm needs, A Law Office in the Cloud includes optional components critical to certain firms, including:

- Robust cloud-based Document Management
- Email archive and encryption
- Hosted PBX (cloud-based phone service)
- The ability to sync the cloud environment to your local network

## From Disjointed to Streamlined

Cloud computing creates a considerable edge for law firms. But it's often delivered piecemeal: firms subscribe to a handful of disjointed cloud services alongside local IT systems,

leaving them with more systems to manage, more vendors, and more complexity—not less.

Here is an example of a typical law firm's technology environment:

- An on-premises server hosting its practice management application
- Dropbox for file storage
- Office 365 or Google Apps for email
- MacAfee for Antivirus
- A VOIP provider for phone service
- A local IT company (that may or may not be a legal technology expert) trying to keep everything working together

A Law Office in the Cloud, on the other hand, is delivered for a simple fixed per-user, per-month fee. The law firm doesn't need to have an IT expert or know how much storage, RAM, and other technical matters. The Cloud is designed to host the legal software, documents, and email used by law firms, and incorporates legal technology best practices.

## More Benefits of a Law Office in the Cloud:

- Accessing your entire firm—software, documents, and email—anytime and anywhere
- Using the legal software you've always used—in the cloud
- Most (or all) technology provided and supported by a single company
- Ending the buying cycle, management headaches of on-site servers

- Controlling otherwise volatile IT costs

## The Verdict

Law firms large and small are recognizing the many benefits of cloud computing. However, without the proper implementation, you may find your firm in a disjointed, inefficient environment.

The Cloud model simplifies a law firm's technology landscape, consolidates accountability, and enables you to practice better.

**“A Law Office in the Cloud is designed to host the legal software, documents, and email used by law firms . . .”**

# Chapter 3

## Cloud-based and Web-based are not the same

All too often, we find that firms feel they must choose between the mobility and ease-of-entry of a web-based app and the functionality and maturity of a traditional, premise-based practice management application (and sacrifice one or the other). *They don't.*

## Not Just Semantics

We're not looking to pick apart terminology just for sport. We will clearly define hosted practice management, web-based practice management,

the differences between them (it's apples and oranges, really), the good, the bad, and who is best suited for which solution.

First: Let's quickly clarify some fuzzy terminology. Cloud-based and web-based are not synonymous. Describing something as cloud-based is a very general description, and generally, just means hosted on another company's infrastructure.

There are a number of applications or implementations of cloud computing, one of which is a web-based application. While *web-based applications* are the most commonly understood uses of cloud computing, they are certainly not the only ones, and not the only implementation of cloud

computing that delivers advantages law firms.

## Hosted vs. Web-based Legal Practice Management

With the challenges of providing legal services efficiently and profitably, practice management software has become the hub of most successful law firms. Increased mobility and around-the-clock access have increased demand for systems that are always on and always available.

For most, that means choosing between web-based and hosted practice management systems. What are they, what are the differences, and what are your options? Let's take a look.



**The differences between cloud-based and web-based are many**



# Chapter 4

## Web-based Practice Management

A web-based practice management system is a web application that is accessed via a web browser. Unlike traditional (non-cloud-based) software, there is no software to install. The software publisher periodically pushes out updates and new features that don't require installation.

All of the storage and processing happens on the provider's computer systems. Web-based practice management applications are relatively new, tend to be simple, lightweight, and favor ease-of-use over robust functionality.

## Popular Applications

Popular web-based legal practice management applications include:

- Clio
- MyCase
- Amicus Cloud
- Rocket Matter

These web-based applications are each different, but share many common features. Most include legal billing, calendaring, client management, and to some degree offer case/matter management.





## The Good

1. **Easy to get started.** Being web-based, you can usually sign up and begin using a web-based practice management solution almost immediately.
2. **Simple.** As web apps are still in their infancy, they tend to be lightweight and simple to use. (To some this comes at the cost of being too simplistic.)
3. **Inexpensive.** Many web-based applications cost less than \$100 / user/month, making them attractive to small law firms with limited budgets.

## The Bad

- **Too simplistic.** For many law firms (especially those experienced with traditional, more mature practice management applications) web-based practice management apps are too simplistic.

Many attorneys we've worked with spent years using a traditional case management solution at a previous firm. When they moved on to start their own practices, and liked the idea of a web-based, easy-entry case management solution, they found most of the web-based applications had a small percentage of the functionality of the software they've come to know and love.

- **Only a portion of your practice.**

While practice/case management software may be the heart of your practice, it's still only a portion of it. Your firm's time and billing, documents, email, and other ancillary software applications also make up the epicenter of your firm's back-office.

Web-based practice management apps leave your documents, email, and other desktop-based software on-premises or to be managed by some other system.

## When Web-Based Practice Management is a Good Fit

In the years we've spent working with firms large and small, we find that the firms that typically embrace web-based legal practice management apps are solos and very small practices. Specifically, firms with *one to three total employees* including attorneys and support staff.

If you're a startup, your needs are more likely to be simple: A client database, simple case management, and simple billing. (And, you're more likely to be starting with a limited budget.) This makes web-based case management attractive.

Firms of four or more total employees are more likely to find web-based applications simply offer too little functionality, and require more robust features including document

assembly, full-fledged billing and accounting, docketing, and more.

We also find that mature firms that have experience with premise-based practice management software have come to know and rely on advanced functionality.

**“While practice/case management software may be the heart of your practice, it’s still only a portion of it.”**

# Chapter 5

## Hosted Practice Management

Hosted Practice Management, the lesser-known but powerful implementation of cloud-based legal practice management, is simply the hosting of desktop/premise-based legal practice management software with a Cloud Service Provider (CSP) rather than your own on-premises server.

In other words, Hosted Practice Management is taking existing legal practice management software that's meant to be installed on your local server and desktop computers and installing it to a cloud-based server, then accessing the software (along with the other components of your practice, such as documents and email) via a virtual desktop.

### Popular Applications

The benefit of many traditional, desktop/server based practice management applications is maturity. Many of these applications have been available for decades, and have developed a rich feature set and cater to the many needs of an evolving law firm. Popular traditional practice management applications that can be hosted include:

- Amicus Premium
- Needles

- PCLaw
- ProLaw
- Tabs3 / Practice Master
- Time Matters

### The Good

- **Functionality.** Hosted practice management applications have rich features sets.
- **Choice and variety.** As a mature software category, there are many traditional practice management apps from which to choose. Some specialize in a particular practice area, such as personal injury or

family law; others are billing-centric, while still others are more all-inclusive with respect to front-office and back-office requirements.

- ***Your entire practice in the cloud.***

A true Private Cloud will include hosting your entire practice, including cloud storage for files and documents, email service, and hosting for other applications, all accessible from one unified virtual desktop.

### The Bad

*Not all clouds are created equal.* Unfortunately, not all hosting providers are up to the task of hosting your practice



management application or supporting your firm. Legal cloud computing is a very specialized segment and it can be easy to fall into the trap of choosing a high-risk provider.

We'll cover some best practices on selecting a Hosted Practice Management provider shortly.

## When Hosted Practice Management is a Good Fit

After working with hundreds of law firms and thousands of lawyers, we've found that most: law firms of *four or more total employees* (including attorneys and support staff) have a much better, more centralized, and more tailored cloud experience when implementing a hosted practice management solution.

At this size and larger, growing and managing a successful law practice tends to be more about efficiency, streamlining process, and scalability, and less about saving a few dollars each month.

Having a single platform for all software, documents, and email is invaluable to firms of four or more employees. Being able to access every aspect of your law practice, not just case management, is critical as your firm grows and evolves.

## Selecting the Best Provider

The caveat to hosted practice man-

agement as the ideal solution for many firms is: you must find a *knowledgeable, battle-tested provider*.

As cloud computing matures, many companies are taking a crack at providing cloud services. This includes IT service providers, software publishers, and generalist hosting companies. When evaluating CSPs, we suggest that you select a provider that meets the following criteria:

- **Cloud Services is the company's primary focus.** Companies not in the business of cloud hosting (including software companies and local IT service providers) see the business case (and the dollars) in cloud computing, and quickly create an offering to capitalize on this relatively new revenue source, but lack the expertise to properly support the system or the hosted software. Ideally, your CSP should have a minimum of three years providing cloud services.
- **Committed to Legal.** Many CSPs can provide cloud servers, virtual desktops, and application hosting. Some of them even list legal as one of the vertical markets they focus on.

The truth is, legal technology is such a specialized market segment, that the only way to truly be a legal tech/legal cloud expert is to completely and exclusively serve law firms. If the provider you're evalu-

ating lists legal as one of several verticals, we advise you to keep searching.

- **Bar Association Recognized.** Many cloud service providers are upstarts or new side ventures for existing companies. The CSP your firm entrusts its data and client records to should be recognized by the ABA, multiple state bar associations, and generally well regarded in both the legal and technical communities.

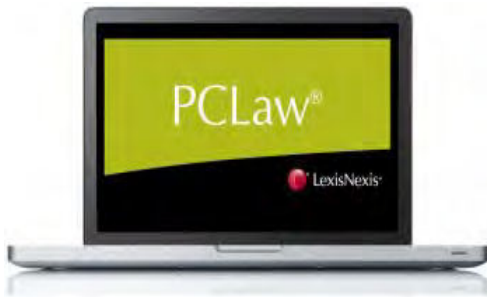
## Evaluating PM Applications

The following Chapters take a closer look at the most popular Practice Management systems, including Up-time's Verdict on each product.

**“Legal cloud computing is a very specialized segment and it can be easy to fall into the trap of choosing a high-risk provider.”**



# Chapter 6



## PCLaw®

PCLaw, a product of LexisNexis, is a billing, accounting and case management system for law firms, with an emphasis on billing and accounting.

Arguably, billing and accounting is at the top of a law firm's hierarchy of needs which would explain why PCLaw has more market share than any other case management solution (cloud-based or otherwise).

PCLaw can be described as a very well rounded law firm back-office suite with functionality that includes time and expense tracking, billing for virtually every format, and complete accounting. By this we mean, unlike many of its competitors, with PCLaw you will not have to rely on another accounting package to handle the rest of your accounting (trust accounting, payroll, AR, AP, payroll and financial statements.)

PCLaw also has what we would describe as lightweight front-office functionality, with simple features such

as a customer database, calendar, and case management features.

## What We Like About PCLaw

There's a lot to like about PCLaw, but if we had to pick a couple of stand-out factors, they would be:

1. ***Straight-Forward & Simple.*** Big picture, our favorite feature about PCLaw is probably that it does what it does (billing, accounting, and simple case/client management) very well, and doesn't try to do more.

If you need a client and matter database, a simple calendar, call log, billing and accounting: PCLaw can likely manage your entire practice.

2. ***Rapid Setup.*** Unlike many other on-premises and hosted practice management applications, PCLaw can be installed and running very quickly. It can be installed to a local or cloud server in minutes, and out-of-the-box it is ready to create matters and bill clients.
3. ***No Other Accounting Software Necessary.*** Most legal practice management and client billing applications leave the back-end accounting to another piece of software (often QuickBooks).

Ledgers, operating accounts, trust accounts, AR and AP are typically the domain of third-party software and may leave your firm disjointed.

At the risk of being repetitive, there's something very Zen about billing and complete accounting in a single software package.

## Key Features

The key functionality of PCLaw includes:

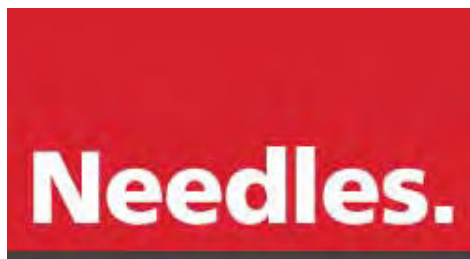
- Time & Expense Tracking
- Billing (including hourly, project-based, flat-fee, split, contingency, and LEDES format)
- Batch Invoicing
- Trust Accounting
- Accounts Payable, Receivable & Banking
- Robust Reporting
- Powerful financial and matter dashboards
- Integration with Time Matters and Amicus Attorney for more comprehensive case management

## The Uptime Verdict

Your firm should use PCLaw if it needs a complete billing, accounting and reporting platform, and doesn't yet (or ever) have a need for more comprehensive case management features (such as document/form assembly and rules-based calendaring).

PCLaw will grow with your firm: it suits small start-up practices as well as mid-sized law firms.

# Chapter 7



*It's about time.*

## Needles

Needles is mature legal case management application. Needles began as many software companies often do: A group of software developers (in this case with legal backgrounds) developed a custom case management solution for their client's personal injury attorneys.

And while Needles is flexible enough to support the needs of virtually any practice area: personal injury practice is where Needles started—and where it really shines.

## What We Like

1. **Specialization.** When Needles was first developed in 1985, their first clients were personal injury attorneys.

That group helped Needles develop its product over the years, and really hone in on the nuanced needs of PI attorneys and cases:

The intake system, workflow/checklist systems, and reporting capabilities were all shaped over years of PI attorney feedback.

2. **Customization.** The Needles case intake system is robust and very customizable.

The case checklist/workflow systems are also among the most-touted features by Needles users, allowing firms to create a process and workflow for each case type that works for their practices.

3. **Integration.** Needles integrates with applications you probably use—like Outlook, QuickBooks, and even WorldDox.

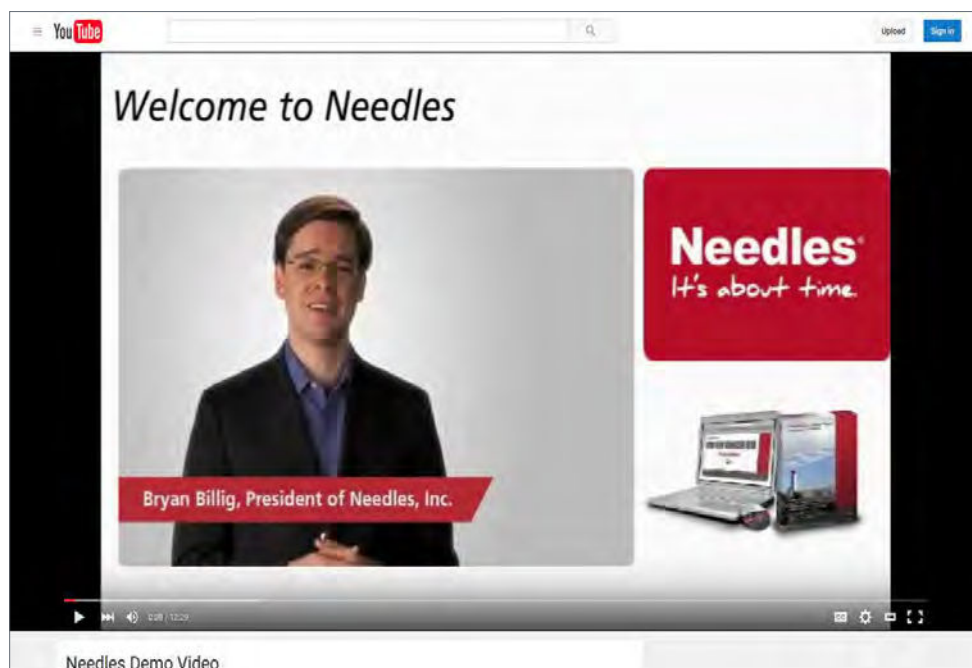
## Key Features

Needles is a complete case and practice management solution, and includes:

- Contact & client management
- Case management
- Customizable case & intake workflow
- Conflict checking
- Statue tracking
- Scan-to-Needles integration

## The Uptime Verdict

Needles is a seasoned, robust case management system. We think it is especially a good fit for law firms that practice personal injury, or those with a need to create or customize very specific case intake and workflow processes.



## See Needles in Action

You can view a YouTube video demonstration by [clicking here](#).

# Chapter 8



## ProLaw™

ProLaw, sold by Elite, a Thomson Reuters Company, is legal practice management, document management, and accounting in a single solution.

ProLaw does a lot, and we tend to think of ProLaw's functionality in three categories:

1. Practice Management, or "front office"
2. Billing and Accounting, or "back office"
3. Document Management

## What We Like about ProLaw

1. **A Fully Integrated Solution.** Many software applications designed for law firms tend to focus exclusively or more heavily on either front-office or back-office functionality.

What we like about ProLaw is that it is a complete package. It does a very good job of practice

management, billing/accounting, and document management. Arguably, ProLaw is the only mainstream legal practice management application that also incorporates a true DMS, or Document Management Solution, with features including versioning, check-in/check-out, and more.

### 2. *It Looks like Microsoft Office.*

Much of the ProLaw interface will look and feel very familiar. That is because ProLaw was designed to look and work like Microsoft Office.

This, in our opinion, makes ProLaw easy to use quickly since it has a familiar look and feel.

### 3. *Documents Live in the Database.*

Most legal practice management applications allow you to link documents (such as Word or PDF files) to a matter, but the file must be stored somewhere else, then manually linked to the matter (which creates a kind of shortcut to the document from your practice management application).

With ProLaw, when you add a document or email to a matter, the document is actually stored in the ProLaw database, keeping everything together and eliminating the need to maintain a separate file system.

## Key Features

ProLaw covers a lot of ground.

- Practice Management
  - » Client & contact management
  - » Case management
  - » Calendaring (including rules-based calendaring)
  - » Link to legal research (via WestLaw)
- Accounting
  - » Billing
  - » Trust Accounting
  - » General Accounting (AR, AP, GL)
- Document Management
  - » In-line document storage
  - » Integration with Microsoft Office
  - » Version Management
  - » Email Management
  - » Check-In/Check-Out
  - » Index & Search

## The Uptime Verdict

ProLaw is an incredibly powerful and mature legal practice management system. We recommend it to our clients when a firm needs practice management, billing/accounting, and document management in a single solution.

ProLaw is often a great fit for law firms that are at least 6 total users in size (solo practices and very small firms may find ProLaw to be "too much").

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# Chapter 9



## Tabs3™

Tabs3, developed by Software Technology Inc., is a legal billing and accounting solution designed for law firms. It is a complete back-office solution for law firms that includes billing, AR/AP, general ledger, and more.

Tabs3 can be complemented by its front-office counterpart: PracticeMaster to add case management, calendaring, workflows, and more. Law firms have used Tabs3 for over 35 years.

## What We Like about Tabs3

In our experience, we find Tabs3 a very popular legal billing & accounting solution for firms that have grown past the solo or solo-plus-one size, and we think we know why:

1. Tabs3 is a **complete billing and accounting solution**: its users will not have to bolt-on another piece of software such as Quick-

Books to facilitate the rest of their accounting (trust accounting, payroll, AR, AP, payroll and financial statements).

2. If your firm needs more sophisticated front-office (practice management) functionality, Tabs3 is complemented well by PracticeMaster (made by the same company, and developed to integrate with Tabs3).

PracticeMaster includes workflows to automate repeat processes, calendaring, conflict search and more. The modular nature of these two products gives them a what-you-need-and-nothing-more quality.

## Key Features

The key and stand-out features of Tabs3 include:

- **Flexible Billing.** We have found Tabs3 billing platform to be incredibly mature and flexible, with options including contingency, split fee, retainer, flat fee, and progress billing. Create standard billing rates for each timekeeper or levels of timekeepers (e.g., partner, associate, etc.), or custom rates for any timekeeper and any client.

You can also use contingency, split fee, retainer, flat fee, progress, and electronic task based billing (requires Taskbill). Then customize your statement to show exactly

what you want. You can also set up simple or complex compensation rules for originating, primary, and secondary timekeepers.

For example, Brad gets 10% of receipts from the Smith matter until he receives a total of \$2,000.

- **Faster Billing.** You can print or e-mail your statements as PDFs. You can automatically generate all of the e-mails and PDFs at once and automatically insert the last payment date, outstanding balance, statement notes, and other client information into the e-mail. Print draft statements and track which are still under internal review.

- **Workflow & Automation** (PracticeMaster). Use Workflows to automatically start tasks or give you and your staff reminders after you perform a particular action.

For example, when you add a new client, let PracticeMaster automatically generate a thank-you letter. With Workflows you and your staff will be more productive and see fewer errors.

- **Conflict Search.** Quickly identify possible conflicts for everyone in your firm. Search clients, contacts, documents, e-mails, and attachments. Advanced options like phonetic spelling and phrase match make your searches more accurate and efficient.



- **Complete Accounting.** Tabs3 is a complete accounting solution, and includes back-office functionality such as reporting, Accounts Payable, Accounts Receivable, Trust Accounting and General Ledger.

## The Uptime Verdict

In our experience working with hundreds of firms, your firm should consider Tabs3 if it needs a complete billing, accounting and reporting platform.

If your firm needs workflow management to streamline and automate processes (such as intake), conflict-of-interest-search, calendaring or other front-office functionality, we advise you take a serious look at Practice-Master as well.

All considered, Tabs3 (and Practice-Master) will grow with your firm: it suits small practices as well as mid-sized law firms.



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# Chapter 10



## Time Matters®

Time Matters is part of the LexisNexis suite of software products. Time Matters focuses primarily on practice management, or front-office functionality, including client and case management, calendaring, tasks, and notes.

Time Matters will also handle your law firm's billing (but not accounting).

## The LexisNexis Ecosystem

LexisNexis offers a portfolio of legal software products designed to meet the needs of many different law firms.

Not every law firm needs every feature of every application, and to that end LexisNexis offers a variety of products that meet different needs and work together.

Since Time Matters is designed to manage your front-office, it integrates

with LexisNexis' other accounting software systems, including:

- PCLaw™, for small law firms, and ...
- Juris™, for midsize and larger law firms

## Key Features

Time Matters has been available for many years, making it a mature product with a broad set of practice management features, including:

- Client and contact management
- Matter and project management
- Calendaring and docketing
- Time and billing
- Document and email linking

## What We Like about Time Matters

1. **Customization.** Time Matters is highly customizable. From customizing the front-end, such as matter screens or reports, to customizing the back-end, and creating custom database queries, workflows and events, Time Matters is one of the most customizable applications available.

Firms with a need to tailor a product to their practice and their process should take a close look at Time Matters.

2. **Integration with PCLaw and Juris.** Time Matters includes basic

billing capabilities—which may suffice for your firm. If not—Time Matters integrates very well with LexisNexis billing and accounting products, PCLaw and Juris. These back-office counterparts can be purchased along with Time Matters or added on later.

3. **Network of Consultants.** As mentioned, Time Matters is very powerful and very customizable—but really getting the most out of it, and tailoring it to your firm, requires an expert.

Fortunately, LexisNexis has an authorized consultant program and a large network of independent legal software consultants who can help your firm maximize your investment in Time Matters.

## The Uptime Verdict

Time Matters is a mature product packed with features to help you manage your practice. We recommend any firm that needs comprehensive case, client, and calendar management take a close look at it—especially if your firm needs a solution that can be customized to your processes and workflow . . . and especially if your firm already uses (or plans to use) PCLaw or Juris for billing and accounting.

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# Chapter 11

## In Summary

Cloud computing for small and mid-sized law firms is truly a game-changer. It eliminates technology roadblocks, increases productivity and mobility, and in most cases reduces overall technology costs.

As with any success plan, the key is identifying the right products and services to fit your practice.

## This eBook has covered:

- Client and contact management
- The benefits and components of cloud computing
- The differences between web-based and hosted applications
- The leading Practice Management applications you might consider for your practice

I trust you'll find this eBook valuable and encourage you to pass it along to anyone who can benefit from its contents.

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# Chapter 12

## Legal Applications

Subject/Product	Publisher/Author	Website Links
▪ PC Law	LexisNexis	<a href="http://needles.com">needles.com</a>
▪ Needles	Needles Case Management	<a href="http://pclaw.com">pclaw.com</a>
▪ ProLaw	Elite	<a href="http://elite.com/prolaw">elite.com/prolaw</a>
▪ Tabs3	Software Technology Inc. Lexis/Nexis	<a href="http://tabs3.com">tabs3.com</a>
▪ Time Matters	LexisNexis	<a href="http://timematters.com">timematters.com</a>

## Other Legal Resource Links

- [Cloud Computing Defined](#)
- [Law Technology Today](#)
- [American Bar Association Legal Technology Center](#)

## Uptime Legal Related Links

- [When Cloud Computing Backfires](#)
- [Private Cloud vs. Office 365 for Law](#)
- [Cloud Computing Due Diligence Whitepaper](#)
- [Are Web Apps a Better Bargain than a Private Cloud?](#)



## More Information

For more information on cloud computing for the legal industry and best practices when moving your law firm to the cloud, please contact us:

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[uptimeLEGAL.com](http://uptimeLEGAL.com)

