

## Upgrades Galore – or Not?

Within the last six months, most of the vendors I deal with have released upgrades to their programs: Amicus Attorney, TimeMatters, PC Law, Worldox. And then there is the impending release of Windows Vista/Office 2007 earlyish next year. Clients often ask me: what should I do? Do I need this upgrade? Many clients understandably feel it is simply too expensive to upgrade every time a new version comes out.

To approach this issue without losing your sanity, it is important to understand how the software industry works and the directions in which it is going. The time is long since past when software companies derived a significant part of their profits from new sales: today, upgrades drive profits. The newest buzzword in software – Software as a Service (“SaaS”) goes even further. In this scenario, you “lease” the use of software on a monthly basis for a specified period of time: software becomes more and more like cell phone service. This has several advantages from the maker’s point of view: not only does it increase and regularize the company’s income stream, it also tends to “lock in” the user to specific software. If you stop using the “service” in some cases you may lose access to your data.

PC Magazine analyst Michael Miller’s recent comment about Microsoft also applies to other software makers: “Its existing

products are good enough, and its upcoming products aren’t must-haves.”

LexisNexis has been gobbling up software companies at a great rate and now owns Time Matters/Billing Matters, PC Law, HotDocs, CaseMap, NetDocuments and Concordance (litigation support) as part of its “Practice Management” stable. Since some of these products are overlapping/competing, it remains to be seen whether the classic computer industry phenomenon of AMD will play itself out (that’s Acquire, Merge, Destroy). In the meantime, LexisNexis has been moving toward a policy of yearly upgrades as part of increasing its revenue stream. This means that each upgrade has fewer new and/or major new features. Upgrades become increasingly marginal in terms of increased utility over the previous version, although following Microsoft’s leads fancier graphics and “wizards” abound (it is usually to your advantage to turn off the wizards as fast as you can and learn how to use the program). Perhaps more importantly, since no software company has the resources to put out a stable new product every year, this means that *over time*, although perhaps *not* in the immediate future, the quality of the software must inevitably decrease, since there will be more pressure to get out the new release and correspondingly fewer resources available to fix the existing release. After all, who is going to pay money for an “upgrade” that simply fixes defects in how a program works? Thus programs are frequently rushed to market in order to meet some artificial deadline. Although you may want to take advantage of the price savings in an immediate upgrade, now more than ever the adage “wait for Service Pack 1 before you implement” is good advice.

For the end user, there is clearly a trade-off in the “leasing” model. On the upside, it guarantees fixed monthly payments and software upgrades. On the down side, it will almost certainly be more expensive than buying the software and upgrading as needed, unless the base software is included as a “loss leader.” The key question is *how much* more expensive: when given these options you should do the math very carefully.

Faced with this situation, many clients have asked me: “it’s been working fine for me, what do I need the new release for anyway?” There are several main reasons why you might want/need a new version.

- It has some new feature that you have been dying to have for years. Thus Time Matters 8’s improved e-mail or its integration with Acrobat Reader could be critical for some firms. PCLaw 8 has the ability to track time that has been written down, and lets you have a timer running in Word.
- You have an older version which is no longer supported. The software may work just fine, but if the time ever comes when you do need support, you are likely to *really* need it (i.e., in some sort of catastrophic situation) and it will not be available.
- The version of the program might not run properly if you purchase new hardware with an updated version of Windows. This issue may be aggravated when Windows Vista comes out some time next year.
- Some software programs, in particular PCLaw and Worldox, include upgrades in the cost of yearly maintenance. This means that there is no financial reason NOT to upgrade, once the new version is stable.

What about specifics?

### Amicus Attorney/ Accounting

Gavel & Gown has completely revamped its product structure. The flagship product, Amicus Attorney 7, has been completely rewritten for SQL. While this is very positive going forward, the product is now very resource-intensive and rather slow, although most of the early issues have been resolved. The program features the ability to create and format an unlimited number of custom fields; much better Outlook integration (you see your entire Outlook inbox, including subfolders, from within Amicus). You can see multiple calendars simply by clicking on a list of users. It also lets you select “Favorites” for files, people, etc. that lets you access a subset of your information quickly, and adds some other minor but slick features, like the ability to look up an address via MapQuest.

Because the requirements for Amicus 7 are more suited to firms of more than 10 users willing to invest in technology, Gavel & Gown has released Amicus Small Firm,

### Heckman Consulting

Heckman Consulting is a systems integration firm specializing in the legal market. John Heckman has over 20 years experience in the legal community. For back issues of this newsletter, go to [www.heckmanco.com](http://www.heckmanco.com). After seven years in Connecticut, we relocated to the New York metropolitan area in 2004. You can now contact us at:

Heckman Consulting  
372 Fifth Street  
Jersey City, NJ 07302  
Tel: (201) 792-0022  
Fax: (201) 792-9542  
e-mail: [heckman@heckmanco.com](mailto:heckman@heckmanco.com)

## Upgrades Galore *(Cont.)*

based on Amicus V+ and incorporating the new Amicus Accounting. This is available only to new clients, with a limit of 10 users.

Finally, the new Amicus Accounting is an interim product based on the purchase of source code from an established Canadian accounting package. Amicus Accounting has severe limitations in terms of the number of users it will support and, more important, format options (client/matter numbers must be all numeric for example). If you integrate Amicus Accounting with an existing Amicus Attorney installation, it will overwrite your existing client/matter numbers and substitute all-numeric ones in some random order.

Gavel & Gown is promising a fully-rewritten accounting package in about 2 years that will do away with the existing limitations. If your needs are very simple and you are willing to accommodate to the limitations of the package, this option might be acceptable for very small firms. Otherwise, you would be better off waiting.

### Time Matters/Billing Matters

Version 8 includes a number of new features, including:

- TM Save and TM Open now function in Firefox and Adobe Acrobat Reader.
- AutoText functionality for Time Matters (previously only in BM);
- Form Styles can now be linked to multiple Classification Codes (if you use extensively customized form styles, this could be very important).
- Billing Matters now lets you customize

the Pre-Bill format.

- Management of email attachments is much improved. This is a key issue for many people using TM e-mail, and could justify an upgrade by itself.

### PCLaw

PCLaw's new features include:

- Ability to open a timer from within Word to track your time while you work.
- More functions export to Excel (including the Register)
- The ability to track time that has been "written down" to get more accurate time reporting for analysis.
- Change lawyer rates in advance to take effect on a given date.
- Reprint, Write Off or Unbill multiple bills at one time.

### Worldox GX

Like PCLaw, Worldox upgrades are part of maintenance. Worldox GX gives you:

- Much improved email integration. Every time you send an email, you are asked whether you wish to copy/move it to Worldox (or ignore that address if it is personal email). In addition, you can now also see the Outlook calendar, contacts and notes from within Worldox.
- An Outlook-like "third pane" to preview documents without opening them.
- Many "ease of use" improvements which, while each one may be minor, added together make a real difference.
- Ability to zip and password multiple attachments to email.
- Improved ability to copy files to a hard drive location or write them to a CD.

### Vista / Microsoft Office 2007

The central fact about Microsoft Vista in the "new interface" version is that it won't run on most current computers. It will ship on a DVD (*not* CDs), and most business computers don't have DVD drives. You will most likely need 2Gb of memory and what today would be considered a high-end gaming video card with 512Mb of dedicated memory for it to work properly. There are virtually no business PCs today which meet these requirements. Most of the really advanced features have been dropped from Vista, so aside from the interface, new features are marginal.

Office 2007 has a drastic interface change that is likely to require substantial retraining. Also, it remains to be seen whether the "new" format will meet the specific needs of law firms. Initially, you might be better off sticking with the old format until the new one has been thoroughly tested in your specific environment. In short, upgrading to Vista should probably be done along with your next cycle of hardware upgrades.

### Conclusion

As a rule I recommend upgrading every other release, except for programs where the upgrade is part of maintenance, or unless there is some new feature you have wanted for a long time or is of particular interest. If you are currently using a version of your product that will be "sunsetting" (such as Time Matters 5) you should definitely upgrade. With programs where the upgrade is part of maintenance (PCLaw or Worldox), it is to your advantage to upgrade once the new releases are stable. ■

Heckman Consulting llc  
372 Fifth Street  
Jersey City, NJ 07302

Stamp