



Newsletter

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Welcome to the winter edition of the newsletter and a belated Happy New Year to you all. 2007 was a busy year with the introduction of the HIPs and the usual implementation of new rules and regulations and we can look forward to an equally exciting 2008 we have no doubt.

Security Issues

Virus protection is a very important issue and one which most of you will have struggled with at some point. If you have spoken to us about this previously you will probably have installed McAfee's anti-virus solution in one form or another as this



is the product range we have been recommending for over 10 years. The McAfee solution is easy to install, consistently rates highly when tested against all known viruses and, most importantly for most of you, it needs no real attention from you in order to update itself and keep your systems protected.

However, as Bob Dylan once sang "the times they are a changing" and McAfee have announced an end of life for their current range of business products. This includes their anti-virus, anti-spam and, especially relevant to many of you out there, small business offerings. Any of you who have Microsoft Small Business Server as your core operating environment will probably have the McAfee Active Virus Defence for Small Business running on it and this is one of the products reaching its end of life.

Don't panic! McAfee will continue to support your existing systems for at least 12 months so there is no immediate crisis but you should start to consider the replacement of your anti-virus systems over the coming few months.

We are still recommending the McAfee systems. McAfee have reworked their product range to ensure that it supports all of the latest operating systems (although they will be dropping support for anything before Windows 2000 so those of you still running Windows 98 machines will be in trouble!) and, most importantly, they are moving towards an Internet based control system. This control system is called the McAfee SecurityCentre and it replaces the older ProtectionPilot system that many of you will be running on your Small Business Server computers.



Installation of the new systems is a snap. You simply click on a web link and it will install all of the components you need to keep your desktops and file servers safe from viruses, spyware, phishing attempts and other unwanted programs. Without any intervention the system automatically update themselves at regular intervals keeping your computers protected against security threats.

For the smaller practice we are recommending an upgrade to McAfee's Total Protection for Small Business (TOPS). This includes the same high-quality anti-virus solution that you are used to from McAfee with additional anti-spyware, desktop firewall and the integrated web Browser Protection from McAfee SiteAdvisor.

If you have your own Microsoft Exchange Server e-mail system (those of you who run Small Business Server will have) you will need something to scan inbound e-mail for viruses at the server. The Advanced version of McAfee's TOPS protects your inbound and outbound e-mail but this does require that you re-route all of your e-mail via McAfee's servers so that they can scan the mail for you before sending it on to your mailboxes.

Whilst this is easy enough if you have your own e-mail domain name and use an ISP that allows you to change your mail server address (called an MX record in computer speak) it can prove problematic for some practices. Professional Technology has therefore come up with an alternative for those firms for whom the Advanced TOPS system isn't the answer. Utilising GFI's MailSecurity product your Exchange Server is protected by two separate anti-virus engines from Norman and BitDefender. The cost of this system is normally less than the Advanced version of TOPS and it runs on your own mail server so there's no need to reroute your mail via McAfee's servers.

For the larger practices out there we are recommending an upgrade to Total Protection for Enterprise which replaces the older ProtectionPilot or ePolicy Orchestrator management systems with a new one, but otherwise offers the same protection levels as the other McAfee systems.

The costs for this will, of course, vary from practice to practice depending on the facilities that you require but complete peace of mind and protection from all those nasty viruses, Trojans, phishing attempts, etc. is surprisingly cheap. You will be looking at somewhere between £30 and £50 per user per annum for the Total Protection system which compares favourably to the costs for such services which you would expect to pay on your home PCs.



If you would like any more information on this or would like to talk to someone about getting your protection up to scratch please give us a call.

UPDATE: McAfee will be offering a very competitive upgrade price for the first year but only if you are quick enough. Costs will come down to under £20 per user for the first year so we would suggest you speak to us sooner rather than later or you could end up spending more than you need to!

Document Management



Document Management technology has always been considered a luxury. Most solicitors' practices have never even considered electronic document management and those that have think it is a system that is implemented only when everything else in the business is covered. The problem is that, for solicitors, document management *is* their business.

Globally, stringent anti-money laundering legislation and financial reporting requirements are making regulatory compliance increasingly complex and demanding for legal practices. Coupled with this trend of tightening regulatory environment is the drive for greater transparency which is compelling practices to take a more strategic approach to both content and document management. These trends are increasing the pressure on legal practices to become more organised with their client's data. Effective electronic document management is recognised as a critical part of compliance with regulatory requirements from both a records management perspective and from a security and traceability standpoint.

Since the implementation of the Sarbanes-Oxley Act [2002] in the US, effective records management has become an essential requirement for good corporate governance and financial reporting. Practices are required by law to retain certain documents for predefined periods. Legal admissibility and evidential weight of electronic documents are other important considerations when implementing a document management system.

Essentially, there are two main areas that can be covered by an electronic document management system - the storage of old or historic case information and the storage and processing of live case information. These two areas can be implemented separately or together but they address two totally separate needs.

Law firms are required to store and have ready access to large volumes of hard copy documents. These include original signed contracts, case notes, legal judgments, working documentation and so on. Space may be at a premium, and storage is often outsourced to specialist offsite storage facilities.

An effective electronic document management strategy can greatly streamline these document storage and retrieval challenges. Original copies of documents may be scanned, stored and managed on site allowing law firms to reduce costs and improve service delivery to their clients.

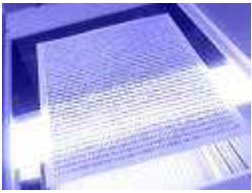
Historic case information can be scanned into electronic form and can then be moved off-site to reclaim valuable office space. For those of you in city centre attractive as the premium price you pay for office scanning the documents and relocating the paper. However, even those practices with plenty of process because files are instantly available and location and access of old case work almost instant to anyone with a PC. You can even extend this search system to provide a more comprehensive knowledge management (KM) system but that is a topic for another time.



Live case information can also be scanned into a document management system and, in time of course, it too becomes historic data. However, there are many advantages to having your live case information in electronic form. Case files are available to any number of people simultaneously so teams can work together on the same case or supervisors can review cases at the same time as fee earners work on them. As you will know, working with paper files makes this almost impossible. In addition, the same search and locate functionality is available for live case work as for the historic cases so you can find cases or even single documents quickly and easily. You already store all of the documents that you create for a case (in word processing or electronic form format) so why not store all other documentation too?

Once you have decided whether you want to store historic cases, live cases or both, you need to think about how you will get all this information into electronic format. Your options are to buy in the necessary scanning hardware and software, which is not as expensive as you would imagine, or you can get an external provider to scan your documents for you.

The former is normally better if you want to store live cases and scanning and indexing documents can be a simple task performed by whoever now opens your post. Scanned documents are stored in a central location for access by authorised personnel and are linked to the case to which they pertain.



The latter is far easier, and usually cheaper, if you have a large volume of paper to archive for historic cases. Working with our partners Paper Mountains we can arrange to scan and index all of your historic documents returning them to you or then storing them off-site for you. The scanned documents can be delivered via CD or DVD disk or, increasingly popular,

stored on a web server for secure access for your staff via the Internet.

At Professional Technology we understand that every practice has its own way of working with documents and therefore its own requirements for Document Management. We have developed a method which allows us to implement flexibility into scanning your paper to meet your needs and all the while ensuring the highest standard in quality and security.

Finally, for those of you using our Seriatim Master Class case management system, documents can be scanned directly into the case plan for any case giving you the complete file history in one easy to find location.

We hope to prepare a more comprehensive e-newsletter on this subject but if you would like any more information on Electronic Document Management please just give us a call.

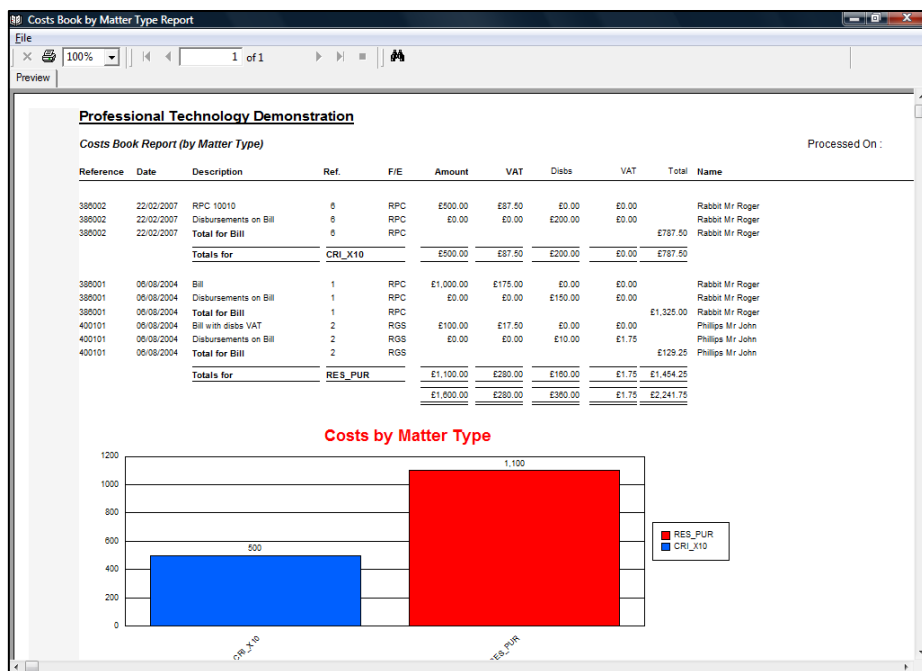
Regulatory Revamp

The Solicitor's Regulatory Authority (SRA) is to consult in March 2008 on the kind of information it will require firms to provide. Key amongst the new information is likely to be a breakdown of turnover in each practice area.

This move is likely to lead to firms in higher-risk practice areas such as conveyancing and personal injury paying more for regulation than other firms. The new rules are expected to be introduced by October of this year.

Under the Legal Services Act 2007, the SRA must move to 'entity based regulation' which means regulating law firms themselves as well as the solicitors in them by next March. However, it will be several years before the SRA has built up enough information to begin charging different fees according to areas of practice.

Most practices will already have the information in some form and those of you using our Quaestor for Windows system can produce it at the click of a button. The "Costs Book by Matter Type" report under the Billing reports heading will give you exactly what is being asked for.



The ILCA Solicitors' Software Users Award



**THE INSTITUTE OF LEGAL
CASHIERS AND ADMINISTRATORS**

The Institute of Legal Cashiers and Administrators continues to remain strictly impartial when asked about specific legal software suppliers. No recommendation or advice is provided. However, to help its members provide their employers with an informed choice the ILCA produce a Listed Suppliers Guide focussing on Legal Accounts and Administration systems and services. This aims to assist members to research, advise or help their firms choose a software package that best suits them.

This is the third year of the Award and they are again asking the users of legal accounts software to vote for the package they think is best. An Award will be presented to the software company to show that this year they have earned the title "The ILCA Solicitors' Software Users Award Winner 2008".

If you would like to rate our systems for this award then take a look at the ILCA's website at www.ilca.org.uk and go to the News & Events section. This will take you to an on-line survey that should only take a few minutes to complete.

If you would like more information on any of the topics covered in this Newsletter then please contact us at the address to the right.

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