From the Oct. 2007 Review of Practice Management Systems

Office Tools Pro 2007 provides a full range of management tools, well fitted to the under-40 employee accounting and law firm. Improvements for 2007 were made to document and project management, complementing the straightforward tools in time and billing, contact management, calendaring and action alerts. Users will find this package to be feature-rich, well supported and affordably priced.

Ease of Use/Flexibility – 4.5 Stars
Office Tools Pro is an excellent package for firms where staff training time is limited. The 2006 review referenced much of the installation process, which has gone relatively unchanged. Installation provides a comprehensive introductory slideshow that highlights features to try and methods for setup. A System Utility package is provided that can assist with database maintenance, backups and data imports, which includes contact migration from Outlook. Administrators can set up "staff" (users), which includes rates, history, professional reviews and default work codes. Staff can also be set up as users with rights to add/modify/delete in the different tools. In the next release, it would be nice to have the password in something other than plain text.

Users may find a few limitations during setup, including the three-character limitation to work codes and a five-character initial limitation to GL codes. However, code entry and duplication is relatively easy. It's worth noting that the application size cannot be changed, and the use of 10-point font and smaller is very common. There is an advantage to this, though: If you use dual monitors, the size of the application allows for it to easily be used while

reviewing multiple reports. Using dual WXGA+ (1440×900) monitors, it's

billing processes to the flows available within the program. Time does need to follow some form of approval process, and billing administrators will appreciate the easy adjustment of hours or straight dollar figures by time card. Invoicing from available time can be done quickly, and the final printed bill can be customized for content or output to Word for further editing. The Word output copy is extremely clean.

Given that the product uses MS Access for its primary database, there are some limitations to table and file size. Firms that use the program's full functionality will want to monitor the database size and perform database maintenance regularly to ensure the best performance.

Scalability/Stability – 4 Stars

Office Tools Pro is not intended for large firms but will work excellently for small and midsize firms that are looking to integrate and consolidate their business processes related to practice management. In particular, those firms with no in-house IT and no desire to support full server-grade products that require SQL Server or Exchange may be an exact fit for this package. The software continues to be stable, and updates from the website are easy to obtain, quick to install and don't disturb the data. Given the product's cafeteria approach of "use what you want, but everything is available," firms can feel comfortable in slow adoption (though diving right in and trying everything out is half the fun). Organizations that grow into larger user groups (40+ users) would need to find an enterprise solution, as there is a potential of outgrowing the system. Also, as new tools are developed and adopted by users, database growth will expectedly rise faster than initially anticipated. Office Tools Pro continues to emphasize its commitment to providing for the future needs of its users, which includes a planned SQL version and upgrade path.

Productivity Tools/Features – 5 Stars

happening by location, staff schedules and color-coded meeting types.

Document management allows for the cataloging of existing data stores, a drop box for automatic addition of files, and attaching documents to projects with category attributes. Multiple features have been added for project management, including graphical summaries of hours, cost and fees. Ready access to project details regarding staffing, time submissions and project "sessions" is also provided. Sessions are project-related appointments. Entries are complete with staff and clients who attended, work matters discussed, work codes, and a method to convert time recorded into billable time.

Reporting – 3.5 Stars

Interfaces are provided for on-demand reporting, particularly for areas that would relate to client questions (project status and schedules). The report section itself is broken down by type, providing separate windows for selection and criteria entry. There's rarely any guessing involved per report function or filtering, as the interface masks out options that are unavailable. The only complaint about reports is there is no period selection option; all dates must be keyed in or picked from the calendar. Fully customized (user-built) reports are not an option. More than 50 reports are available, 20 with an emphasis on billing.

Support/Help/Updates – 4.5 Stars

North 40 Systems provides a range of technology services, paying significant attention to Office Tools Pro. Its website regularly receives updates with 10 task-specific user guides publicly available, as well as application updates, though the knowledgebase has only seen one new entry since 2005. The online support form works (it was tested!), with prompt follow-through. Support hours are standard Monday to Friday, 8:00-5:00 Pacific Time.

Integration – 4.5 Stars

files from within Office Tools Pro. Documents referenced under document management
can be launched directly from the listing into their native application or sent
via e-mail from the user's instance of Outlook.

Relative Value – 4.5 Stars

New and smaller firms should consider Office Tools Pro. It's easy to maintain, rich in tools, and strong on upgrades and support. Licensing is $550 for the first user and $175 per additional user. A 10-user office suite (all modules, training guides, support and one year of upgrades) can be purchased for $2,000; annual renewals are 35 percent of the current license price.

2007 Overall Rating: 4.5 Stars

Technology

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