Review: HoudiniESQ: Practice Management in Your Private Cloud

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HoudiniESQ
www.houdiniesq.com

TechnoScore: 4.0
1 = Lowest Possible Score;
5 = Highest Possible Score

And now for something "completely different" in law firm practice management — HoudiniESQ, a new practice management system developed from LOGICBit. You can host HoudiniESQ on a Windows, Mac, or Linux server, and use it in any Web browser. Sounds good, but how well does it work? In this TechnoFeature, practice management and document assembly specialist Seth Rowland, Esq. takes HoudiniESQ for a spin and presents his findings — in considerable detail as always.

INTRODUCTION

What if you could build your own practice management system to your specifications? What would happen if you could "reinvent" practice management? What could you imagine if you had no obligations to an installed user-base? What if the constraints of "Microsoft Windows" design didn't apply to you? What would you do if you were given a "second" chance?

Frank Rivera was the "architect of Time Matters World Server" (a version of LexisNexis' Time Matters that works in a Web-browser). He has since started his own company, LOGICBit, which re-cently released HoudiniESQ, a practice management system that works entirely in a browser. It's a database, Web server, document manager, email manager, calendar manager, and private cloud, all wrapped in one. It works in any browser and can be installed on any platform, including a hosted platform. It can also use any database or none at all.

HoudiniESQ has the potential to completely redefine what a legal practice management system is, how it should handle data, and what it should do.

INSTALLATION AND PRICING

HoudiniESQ installs in five minutes, seriously. You can download HoudiniESQ from the Web site. Once you register and receive a license code, you are ready to go. If you are a solo practitioner, you can use the software "for free." If you have more than one user, then you pay a one-time base "server" fee of $792, and an annual per user fee of $96. If you want LOGICBit to host your database, you'll pay a monthly fee of $48/user per month.

I installed the software on a fairly powerful desktop machine (Windows Vista 64 custom-box with a quad-core processor and 8 GB of RAM). I ran a brief wizard, defining a localhost (Web server). After I entered details about my firm, the system sent a registration email message to LOGICBit. I then had to wait until I got sent a license code to start playing with the software.

REINVENTING THE INTERFACE

HoudiniESQ doesn't look like anything you have ever seen on a Microsoft Windows PC. Even though it runs entirely in a browser, it also doesn't look like anything you have ever seen on the Internet. Houdini defies easy categorization. It is a cross between Apple OS X, Solaris, and something entirely new.

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LOGICBit recommends running your browser (Internet Explorer, Safari, Chrome, or Firefox) in full-screen view. When you do, you are presented with a desktop empty of all icons except a single launch bar along the top left of the screen. From here you can launch your matter dashboard, your matter manager, your calendar, your email, and your integrated chat. Yes chat. HoudiniESQ is a Web-based system built in the age of social media; it includes instant messaging and services such as Twitter.

It is fair to call HoudiniESQ the first case management system built for the Mac. You can install the server on Windows, Mac OS X, and Linux. But HoudiniESQ

functions much like a Mac program. The installer is the program, in one self-contained unit; it works out of the box once licensed. The navigation appears as a floating bar that spawns "fly menus." Information is presented in translucent windows that blend into the background and you can resize them by dragging on the bottom-right corner.

For someone as embedded in the PC-World as I am (though I have dabbled with my son's MacBook), it is a new experience. I found myself having to "rethink" how I use a computer; a bit of a culture shock. Most Mac users will likely get it instantly.

There are graphic icons that identify all the features of the program in picture menus. I recommend watching all the videos and attending the daily demo given by Frank at 1 PM EST each day, for this is a really powerful program. Much of the power is hidden in the interface unless you know what icons to click to unlock it.

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COVERING THE BASICS IN A NEW WAY
Most matter management systems are three dimensional. There are matters, contacts, and related records. Both matters and contacts have a basic pre-defined set of fields. Related records are often fragmented into events, tasks,

documents, notes, research, email, timeslips, etc., each in their own data tables.

Depending on the case management program, you may be stuck with the fields defined by the software developer, or you may have varying ability to add or configure custom fields for matter and contact records. For example, Time Matters, Amicus Attorney Premium Edition, and AdvologixPM offer extensive ability to customize, with customizations controlled by practice type or classification code.

And while related records can be displayed in a "chronology," they are in separate database tables which limit your ability to address and present these records as a "whole" on a matter. In Time Matters, you can display a timeline, use power views to aggregate lists in one HTML window, or use the related records tab. In Amicus Attorney you have the chronology brad. In AdvologixPM, you have configurable "sublists" on the primary account, matter, or contact record.

HoudiniESQ changes the paradigm. First, it is truly three dimensional. There are matters, contacts, and events; that's it. All related records are "events" and in a single table. They are events in the sense that they occur at a particular time and endure for a particular time. HoudiniESQ is "event-centric." Everything a lawyer does is "billable."

Rather than triggering a timeslip, the event itself is the timeslip. Since everything you do is an event, you can view everything on the Group Calendars. Most people will leave the default to show only calendar events on their calendar.

HoudiniESQ has all the related record types you would expect from a full-powered practice management system, with many useful innovations. What differs is how they are managed "under the hood."

Second, HoudiniESQ supports unlimited, three dimensional customization. Rather than "form styles" that mask a fixed database table, HoudiniESQ enables you to add unlimited custom fields on a contact, matter, or event. Each of these records has a "type" and a "status." For each type, you can define custom fields and designate custom statuses for that type. Then, for each status on a type of record, you can define custom fields.

If you change the record type or the status, the data in the custom fields on the prior type or status is preserved intact. This means you can build "phases" into a matter, with separate fields for each phase.

MATTER DESKTOP, MATTER DASHBOARD, AND ELMO
There is a lot to this program. One of the most innovative is the matter desktop. It functions much like the matter journal in Time Matters, which likely inspired this feature. It displays boxes or widgets, with information from all related records. It differs in that you can resize, move, hide, and completely configure each widget. As you change the matter, the data instantly updates and you can act upon it.

There is a separate matter dashboard, also configurable. The difference is the "desktop" requires you to select a matter in the search menu. The dashboard enables you to see a list of all your matters in a column, and then display the most

important information. The "details" page includes Events, ToDos, and related Contacts, generally the most important information on a file. There are also bottom tabs that give you access to all the other related records and details, such as documents, billing, email, etc.

The desktop can also include ELMO, a feature sort of inspired by the red furry Sesame Street character. In the world of HoudiniESQ, ELMO is a window into your upcoming events and tasks that updates regularly throughout the day. In other words, a tickler (get it — tickle me Elmo).

INTEGRATED SEARCH
The backbone of HoudiniESQ is Houdini IRIS, the Information Repository and Indexing Service. This search engine, designed by Rivera, is responsible for the product's lightning speed in finding records and displaying related records. Search is not an afterthought, but an integral part of the system.

You can use Boolean operators AND and OR as well as the wild cards * and ? in your search. Searches can be case-sensitive. You can search globally or designate specific fields. You can specify ranges. You can designate certain terms as more important than other terms. You can use fuzzy searches. You can limit it to your data, your firm's data, your documents, or you can expand your search out to eDiscovery (documents and email) or the Internet, to Google Scholar or Lexis for legal case research.

GROUP CALENDARING
The main innovation on the calendar is that it works in a browser like a desktop application. It supports daily, weekly, and monthly views, as well as group calendaring. While the calendar is an exciting technical achievement, in its implementation, it is not much different than the other practice management systems; it gives you what you expect it to give.

However, the HoudiniESQ calendar does offer some innovative features. You can quickly filter by event codes (filtering tasks, events, and all other date-stamped related record types). Further, each user can have multiple overlapping calendars. For example, you might have a work calendar and a private calendar, with the former being public to your other firm members. Rather than switching calendars, you can display them together in a single calendar view. And because HoudiniESQ is Web-centric, you can synchronize your calendar with Google Calendar.

You can have an office with Macs, Linux, and PCs using the same practice management system without Bootcamp or internal warfare.

NEEDED IMPROVEMENTS
Realize that HoudiniESQ is a new product. While it has attracted a number of high-profile customers, some gaps exist.

HoudiniESQ lacks a robust report designer. You can create all sorts of views and displays and print them with a clean style sheet. But you cannot, at present, create a custom report with groupings and subtotals. I am told such a designer is on the roadmap. For now, you can either create printable views or use the powerful API (Application Programming Interface) with your own report designer to build reports.

As a document assembly specialist, I look at document and data work flow. I am very happy with the unlimited custom fields. However, at present the ability to use those fields is limited to merge templates using Microsoft Word's limited merge capability in a tool that is under development. There are plans to build a Web-based RTF editor that includes drag and drop fields, but it too will likely be limited to merge data, rather than rule-based document assembly. There are ways to use the API to get data from HoudiniESQ, but at present no easy tool exists for mapping data to a HotDocs answer file, or sending the data to DocXpress, Exari, or ContractExpress.

HoudiniESQ's billing components handle basic billing, invoicing, and trust accounting. The invoice builder is quite sophisticated, enabling you to drill back to the source records. The system, at present, however, lacks supports for alternative billing structures. I also did not see options for batch-processing of bills on multiple matters, as found in dedicated billing systems for example.

CONCLUSION: OVERALL RATING
HoudiniESQ represents such a radical departure in design from the other practice management systems that it is hard to rate. Some of its features are far ahead of any other system currently available. And other features are still clearly under development. At present, I would give it a TechnoScore of 4.0 on a scale of 1.0 to 5.0.

If you are a Penguin-devotee or a Mac fanatic (solidly in the "I hate Microsoft camp"), you will love HoudiniESQ. This is a practice management system for you with all of the features of a Windows-based system, without Windows. No need to envy your PC colleagues any more.

If you are a "PC" and want to live a little bit on the wild side, HoudiniESQ might be the product for you. You can be as mobile as you like. You can have an office with Macs, Linux, and PCs using the same practice management system without Bootcamp or internal warfare.

LOGICBIT'S RESPONSE
We invited LOGICBit to respond to this TechnoFeature. Chief Architect Frank A. Rivera responded as follows:

"Not just for Apple lovers. Many Windows users find our product's look and feel as well as our approach to practice management refreshing. A large percentage of our clients are former Time Matters users. After all, Time Matters was built to look and feel like Windows Outlook. I think the industry is ready for change and we are happy to oblige.

"I would like to thank Seth Rowland for taking the time to really dive into our product's feature set and sharing his professional opinion. We look forward to addressing his concerns and our products shortcomings, especially those related to document automation and assembly in the very near future."

Seth Rowland, Esq. was named TechnoLawyer Consultant of the Year in 2002 for his contributions to TechnoLawyer on the subject of document assembly and law practice automation. He is a nationally known technologist whose company, Basha Systems LLC, has helped many law firms build customized practice management and workflow solutions. Please feel free to visit his blog for the latest on document assembly and practice management.

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