

PRACTICE MANAGEMENT SOFTWARE DATA PRESERVATION OPTIONS



	ABACUSLAW	ACUMIN	ADERANT EXPERT EXPERT SIERRA	BRIEF LEGAL	CLIO	COSMOLEX	ELITE PROLAW ELITE 3E	ESILAW	GHOSTPRACTICE	PCLAW	SOLUNO
BEST FOR	Any size	20+	Aderant Expert – smaller firms – min 20 users Expert Sierra – medium – 100+ lawyers	Small/medium	Any size	Any size	Prolaw – small 3E – 40+ lawyers	Any size	5-200 users	Any size	Any size
OS	Windows or Cloud Requires Windows for 2+ users	Windows	Aderant Expert – Windows Expert Sierra – cloud	Mac & Windows Timekeeping app - cloud	Cloud	Cloud	Prolaw – Windows or cloud 3E – cloud	Windows, Cloud (limited access on Mac)	Windows	Windows	Mac, Windows, Cloud (OS agnostic)

WHILE A LICENCE REMAINS ACTIVE:

CAN CUSTOMERS BACKUP/EXPORT THEIR DATA ON THEIR OWN SERVERS?	Clients can backup their files and export the data to their servers.	Yes, this is possible. Acumin's data is hosted in Microsoft's SQL database.		Yes they can. They can create and save backups of their Brief Accounting data file as well as export all of their data to text.		We have the option to export data as needed.		Yes.	Correct. GhostPractice utilizes a Microsoft SQL database that is purchased and owned by the law firm directly. Smaller firms can typically use SQL Express (at no cost), but it has a 10 GB database limit. The SQL database can be hosted by the firm directly onsite on a server, or remotely using a 3rd party IT hosting service. Either way, as long as the GhostPractice application can access the database, it works smoothly. Backups will run via the software, but the local location of the backup must be set and managed by the customer. It's their data.	PCLaw customers can backup/export their data on their own servers or designated local drives.	Soluno customers can export data as required.
CAN THOSE BACKUPS/EXPORTS ONLY BE ACCESSED USING YOUR SOFTWARE OR ARE THEY SAVED IN A MORE GENERIC (PDF, CSV) FORMAT?	No, they can be accessed outside of Abacus. The backup files are in generic file formats (dbf file type).	No, depending on how the back-up is done, anyone can do it with a report writer tool.		Backups of their datafile can only be accessed with Brief Accounting. Exports are in generic tab-delimited text that can be opened in Excel or any text editor.		They can export the data in pdf, excel or csv format		The recommended approach to backing up or exporting data from the software is to create reports that can be printed or saved electronically in a generic (i.e., PDF) format.	Backups are comprised of 3 databases..., one for system generated PDFs, one for actual matter documents saved into GhostPractice, and one for the actual field data for time entries, contacts, clients, matters, etc. All of this data could be accessed via SQL editing tools, but it is encrypted and really requires the GhostPractice software to navigate relational nature of the data tables. The backup files are stored in a .BAK format.	Exported PCLaw data may be saved in file formats of the user's choice.	Customers can export their data in pdf, excel or csv format. Upon request, Soluno provides a decrypted SQL database of the firm's data that they are able access, control, and move to another product long after licenses are lost.



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WHAT CAN CUSTOMERS BACKUP/EXPORT? (CLIENT NAMES AND CONTACT INFORMATION, BILLING HISTORIES, UNBILLED WIP, MATTER NAMES AND FILE NUMBERS, SUPPLIER INFORMATION, ETC.)	All Practice Management data, Accounting data, and optionally, all accounting posting reports and invoices.	Yes, all this data is available.		They can export essentially all of their data. All client and matter info, billing and accounting history, WIP, Vendors etc... can all be exported to tab-delimited text.		Every page/grid in our software and every report has an export function.		ESILaw has a very extensive set of reports that can be prepared by the licensee. These reports provide a variety of ways to filter, view and export the data contained in the software.	Everything in the system is backed up.	All PCLaw data is easily accessible and ready for export.	Every page/grid in Soluno's software and every report has an export function. Customers are able to export all reports to XLSX, CSV or PDF in addition to the SQL database that Soluno provides upon termination.

ONCE A LICENCE EXPIRES:

DO THE TERMS OF YOUR LICENCE ALLOW USERS TO CONTINUE TO USE YOUR SOFTWARE TO ACCESS/PRINT/EXPORT THEIR PREVIOUSLY-RECORDED DATA POST-TERMINATION? OR MUST ALL USE END WHEN THEIR LICENCE ENDS?	The program reverts to read-only mode. They can access, export or print data, but not add or modify data if the data resides on their server.	Depending upon their support agreement, the system can still be accessed for reporting and look-up purposes. In cases where firms have moved away from Acumin to another platform, many keep a stand-alone license active so they have the full benefit of Acumin at a very nominal cost.		The users are provided with a read-only version of their data file for continued access. They are still able to print and export all reports and data. They just can't input new transactions.		We make it clear as part of our cancellation process, that it is recommended that they export any needed data prior to canceling, as they will lose access to the program. Within 30 days after cancellation, they can contact us to request temporary access for export purposes.		Access to the software terminates upon termination of the licence.	Firms can pay for one license with a read only access after termination of the EULA. Firms also have the choice for having a fully functional license(s), but this requires covering the cost of our pricing minimum (currently \$500/month for up to 10 licenses). If a firm migrates to another system, all of the data would likely be exported and imported into another system. It's the same thing we do when customers move to GhostPractice.	All PCLaw data is accessible and exportable in read-only mode, in the case that a license is terminated.	As part of their cancellation process, Soluno recommends that customers export any needed data prior to canceling, as they will lose access to the program. Within 30 days after cancellation, customers can contact Soluno to request temporary access for export purposes.
IF ALL USE OF THE PAID LICENCE MUST END ON THE DATE OF TERMINATION, DO YOU PROVIDE A READ-ONLY ALTERNATIVE THAT LETS CUSTOMERS GET TO THEIR DATA POST-TERMINATION? IF SO, WHAT IS THE COST?	The program reverts to read-only mode at no charge once their license expires.	Yes, as mentioned above. The cost ranges from 50 – 250\$ per month depending upon firm requirements. Alternatively, some firms provide us with their database and for Dexco to run one-time reports. Costs run at 185\$/hour and typically take 1-2 hours to set up and run. This is sometimes the most effective option.		You have that correct. If they terminate their subscription they can continue to access a read-only version. There is no cost. We do periodically provide data export conversion services if a client requires their data exported in some other format type but that is something they can do themselves via the exports they can generate.		We do not provide read only access post termination.		Licensees should export data prior to termination of the licence. We do not offer a read-only licence. Some licensees opt to maintain a single user licence for the purpose of maintaining historical access to the software.	As per above, a read only for one viewing license is \$50/month.	Yes, and there is no cost for PCLaw read-only mode.	Soluno does not provide read-only access post termination.



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WHAT CAN CUSTOMERS ACCESS POST-TERMINATION WITHOUT A PAID LICENCE? (CLIENT NAMES, ETC.) OR MUST THEY MAINTAIN A PAID LICENCE IF THEY WANT TO PRESERVE THE ABILITY TO DO THESE THINGS?	They can view, export and run reports on existing data. Any data entry or modification requires an active license, for example adding new clients, processing bills, generating rules, etc.	As mentioned above, should the client choose the stand-alone license, the entire database is accessible and all transactional information is available as if they were in a fully active status. If not, they will be rely on their back-up data and the third party access tool.		They have access to everything. They do not need to maintain a license. The only limitation is input of new data.		We suggest that they export the information they need prior to cancelation. If they want to maintain their access to the program, they must maintain a license.		A licence is required in order to access and use the features of the software. There are no features of the software that are avail-able without a licence. However, licensees that seek to terminate their licence may create reports of the data maintained in the software, which can be printed or saved electronically in a generic (i.e., PDF) format. Some licensees opt to maintain a single user licence for the purpose of maintaining historical access to the software.	There would be viewing access for anything in the system, but no ability to add, nor edit anything.	All PCLaw information is accessible in read-only mode, in the case that a license is terminated. PCLaw users are advised to keep a minimum number of licenses to maintain support and training benefits of the AMP [sic] Membership.	Customers must have a valid, paid license in order to access the system. Soluno suggests that customers export any required information prior to cancelling their subscription.
IF A CUSTOMER WANTS TO BACKUP/EXPORT ANY OF THEIR DATA POST-TERMINATION, HOW QUICKLY MUST THEY ACT?	If the data files reside on their server, a backup can be done at any time. If we are hosting the application on our servers, they would need to do the backup prior to termination.	The client is in control of the back-up process and does not need Dexco services.		They don't have to act quickly. They continue to have access to backup and export.		It is recommended to complete this task prior to canceling, but within 30 days after cancelation, they can contact us to request temporary access for export purposes.		A licensee can back-up or export data maintained in the software at any point in time prior to the termination of the licence.	After the first full year on the system, cust-omer firms must provide a 2 month notice period to termination. As a part of our EULA, the firms must give our team access to remove the software, or reduce it down to the minimum number of users, or perhaps to 1 viewing license only. Once this has occurred, the monthly subscription invoicing will stop.	PCLaw data, post-termination, is accessible and ready for export, without any limitation on time.	Soluno recommends that customers complete this prior to cancelling a subscription. Customers may contact Soluno within 30 days of cancellation to request temporary access for export purposes.
DO YOU PRESERVE ANY CUSTOMER DATA ONCE THAT TIME PASSES? FOR HOW LONG?	For those firms that have us hosting their data on our servers, we retain it for a period of 30 days.	Dexco does not retain any client data outside of their environment. We do not purge Dexco client data. Should a client wish for us to host their data, this can be done and a hosting fee will apply. Most clients will preserve their data within their system and should post-termin-ation assis-tance be needed, we can access the back-up database and provide the information needed.		Normally we do not. The client has all their own data. We do have clients request we store a backup of their data for them when they are active clients. We will continue to hold those backups for a period of time even after they terminate a subscription. Normally those would be destroyed after a year of termination.		Customer data is maintained for 30 days after cancelation		For EsiLaw and EsiLaw 360 Desktop, the data is hosted and controlled by the customer on their own infrastructure. For EsiLaw 360 Cloud, the data is removed 60 days after the termination of the licence.	GhostPractice does not currently host, store, nor retain any of our customers data. We do provide full support to all our customers in helping them restore database backups when needed. In addition, we provide all our customers with documentation on how to create and restore back ups. In addition, we have documentation on best practices for your backups.	PCLaw users own their data and have complete accessibility.	Soluno securely maintains customer data for 30 days after cancellation.



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OTHER INFORMATION	<p>Abacus EULA:</p> <p>7. Client shall at all times retain ownership of all data generated or imported into the Service by Client. If Client's license to use the Service is suspended or terminated (as discussed below), Client shall have an opportunity (at its sole expense) to extract its data from the Service in a format that could be used in another platform or application.</p> <p>20. Either party may terminate Client's AbacusLaw Subscription ...by providing 30 days written notice to the other party; ... To the extent that Client's installation of AbacusLaw has not already been converted into read only mode, upon termination of Client's AbacusLaw Subscription (for any reason), Client's installation of AbacusLaw will convert to read only mode as of the effective date of Client's AbacusLaw Subscription.</p>	<p>'[W]e recognize that firms migrate to and from software platforms and must work within government compliance rules. Most clients migrate their data from one application to another, especially where trust and tax information is concerned. We have various options for clients to back-up, maintain and access information depending on their needs, capabilities and budget. At the worse case scenario, should a client need our services at any time after termination, we are able to assist.'</p>	<p>Clio Terms of Service:</p> <p>2.9 Themis reserves the right at any time... to modify or discontinue, temporarily or permanently, any feature associated with the Service, with or without notice, except that Themis shall provide Subscriber with 30-days notice of any modification that materially reduces the functionality of the Service.</p> <p>2.11 Themis stores all Content on redundant storage servers. The Subscriber may elect to... replicate all Content associated with the subscription to a third party storage service ("Escrow Agent")... The Subscriber may also elect to replicate all Content associated with the subscription on its own storage device.</p> <p>8.1 Themis's managed backup services must be designed to facilitate restoration of Content to the server or device from which the Content originated in the event the primary data is lost or corrupted. Themis shall ensure recovery of lost or corrupted Content at no cost to you. Following any cancellation or termination of Service for any reason, Subscriber shall have ninety days to retrieve any and all Content.</p> <p>10.4 As required by Section 8 above ("Managed Backup and Archiving"), upon cancellation or termination of a subscription, Content is made available to the Administrator or a designated Authorized User. Following a period of no less than ninety (90) days from the cancellation or termination of a subscription, all Content associated with such subscription will be irrevocably deleted from the Service. All Escrowed Data, if any, will continue to remain available for a period of six months upon cancellation or termination of a subscription in accordance with the terms of the Escrow Agreement.</p> <p>Clio Help articles:</p> <p>Canceling Your Clio Account</p> <p>How to Access the Export Page in Clio</p> <p>How to Export Data from Clio</p>	<p>Cosmolex Subscription Agreement:</p> <p>4. Modification of Services. We reserve the right to modify the Services from time to time; however, future modifications will not result in a diminution of the functionality or quality of the Services.</p> <p>13(3) If we terminate this Agreement or do not offer renewal, we will provide you at least thirty (30) days after termination of this Agreement to retrieve any and all of your Confidential Information and data in the form and format provided by our software. If you cancel your subscription, it is your sole responsibility to retrieve your Confidential Information prior to your cancellation of the Agreement. In any event, we reserve the right to irrevocably delete all of your Confidential Information and data beginning with thirty (30) days after termination or cancellation.</p> <p>Cosmolex Knowledge Base:</p> <p>Overview of Data Migration Service</p> <p>Exporting your data from CosmoLex</p> <p>Exporting Contacts</p>	<p>EsiLaw 360 Terms of Service:</p> <p>Upon the termination or expiration of this Agreement for any reason: (i) Customer will immediately cease all access to and use of the Services, and will delete all copies of the Service Software and Documentation in Customer's possession or control.'</p> <p>'Storage. Provider has no obligation to retain Customer Data after the Subscription ends.</p> <p>Clio website includes materials to assist migrating data from EsiLaw to Clio:</p> <p>What Data Can I Migrate from EsiLaw to Clio?</p> <p>How to Export Data from EsiLaw</p> <p>What Data Can't be Migrated or Imported into Clio?</p>	<p>Clio website includes materials to assist migrating data from PCLaw to Clio:</p> <p>How to Export Data from PCLaw (Version 15 or later)</p> <p>What Data Can I Export from PCLaw?</p> <p>How to Export your Time Entries to PCLaw</p> <p>How to Import PCLaw Contacts into Clio</p> <p>How do I export Activity posts?</p> <p>How to Export Data from PCLaw (Version 14 or earlier)</p> <p>Does Clio Integrate with PCLaw (PCLaw)?</p>	<p>Soluno Terms of Service:</p> <p>Soluno reserves the Services right to adjust as required while at the same time, maintaining current levels of functionality and service quality.</p> <p>If a customer cancels their subscription, it is their sole responsibility to retrieve all confidential information prior to the date of cancellation of the subscription.</p> <p>If Soluno terminates or does not renew a subscription, the customer will receive a decrypted SQL database of their data (upon request).</p> <p>Soluno reserves the right to permanently delete all of the customer's data beginning 30 days following the termination or cancellation.</p>