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ILTA White Paper April 2009



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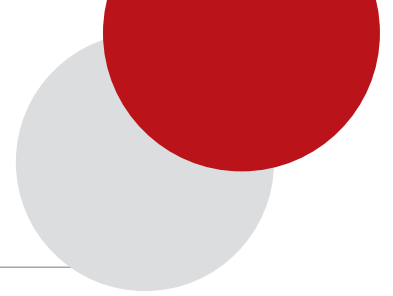
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Enhanced security, reduced costs, reduced energy usage, improved employee productivity: What's not to love about Office 2007, Vista and/or Windows 7?

As you strategize your company's deployment of this new breed of office and operating systems, you'll want to pay close attention to the experiences of the trail-blazers. With the new opportunities come new challenges, not the least of which is the exposure of a gap in skill deficiencies when faced with the new user interface.

The experts who contributed their knowledge to this publication include Microsoft executives who provide "front line" reports on what can be expected with the new operating systems and offer resources and tools to ease your deployment. Our key consultants provide their experience in planning for, launching and supporting Office 2007. And we have member case studies on successful implementations of

SharePoint, Microsoft's Office Communications Server and an Office 2007 OPENXML document generator developed in-house.

Member feedback drives the content of our publications, and I wish to acknowledge Kara Portwood, Vice President of ILTA's Microsoft Peer Group, and her Steering Committee for directing the excellent content that you'll enjoy in this white paper. My sincere gratitude is extended to the many contributors from whose expertise you'll benefit.

Randi Mayes
Editor-In-Chief

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by **Sherry Kappel, Microsystems**

In an industry where Office applications, most notably Microsoft Word, are mission-critical, your firm must realize productivity and stability by creating an informed deployment strategy. Our expert shares her findings from rollouts across several early adopter firms.

STATEMENT OF PURPOSE

ILTA is the premier peer networking organization, providing information to members to maximize the value of technology in support of the legal profession.

ABOUT ILTA

Providing technology solutions to law firms and legal departments gets more complex every day. Connecting with your peers to exchange ideas with those who have "been there done that" has never been more valuable. For over three decades, the International Legal Technology Association has led the way in sharing knowledge and experience for those faced with challenges in their firms and legal departments. ILTA members come from firms of all sizes and all areas of practice, all sharing a common need to have access to the latest information about products and support services that impact the legal profession.

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Windows 7 for Legal IT

Microsoft's Brian Zeve Responds to ILTA's Questions

In January, Microsoft announced the beta availability of Windows 7, the next generation of Microsoft's client operating system. Since there has been much speculation in the legal industry regarding the up-and-coming capabilities of Windows newest operating system, Microsoft is providing some details in response to your questions, giving our ILTA readers an early look at the features and experiences that law firms can expect when Windows 7 is made generally available. They're also providing recommendations for what cost-conscious law firms should do in 2009 to ensure their companies can realize improved productivity, enhanced security and reduced IT costs from their Windows operating system today and tomorrow.

▣ WHAT IS NEW WITH WINDOWS 7?

With Windows 7, Microsoft is building on the substantial investments made in Windows Vista by:

- Improving security, reliability and performance.
- Enhancing PC management with a focus on compatibility and battery life.
- Introducing compelling new experiences for users.

Microsoft is on track to deliver a system that will enable law professionals to spend more time doing what they need to do each day: profitably serve their clients. Windows 7 will deliver an operating system that is more nimble and reliable, that maximizes utilization of today's powerful hardware and easily connects with all the devices that law professionals rely on today.

▣ WHAT CHANGES DID MICROSOFT MAKE IN DESIGNING WINDOWS 7?

Windows 7 reflects an evolved approach to engineering the operating system that is guided by lessons learned

from user experience with Windows Vista and previous versions of the operating system. It weaves customer feedback more closely into the development process and enables the delivery of innovative new features in a way that preserves compatibility and performance.

Microsoft's investments in Windows 7 are shaped by the evolving needs of end users and IT professionals in the enterprise. Users are becoming more computer-savvy, and they expect more from the technology they use at work. They expect the ability to work from home, from branch offices and on-the-road, with the same level of productivity. As user needs have changed, the demands on IT professionals have increased. Today, IT professionals must provide greater capabilities and flexibility for users while continuing to minimize cost and security risks. Microsoft has designed Windows 7 to address these requirements.

▣ WHAT ARE THE KEY WINDOWS 7 ADVANCEMENTS FROM WINDOWS VISTA?

New capabilities that will deliver solid benefits to legal professionals and the firm's IT department include advancements that:

- Enhance enterprise search capabilities so users can query a SharePoint site on a firm's intranet right from Windows, as well as files on a user's PC.
- Enable mobile workers to be productive anywhere by providing them with seamless, secure access to the firm's corporate networks without the need to connect to a VPN.
- Decrease the time that a law firm's branch offices must spend waiting to download files across the network.
- Help to protect sensitive data on PCs and removable drives, with manageability to enforce encryption and backup of recovery keys so that data is accessible.

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- **Limit the risk of malicious software by enabling IT to specify which software is allowed to run on each user's PC through centrally managed, flexible Group Policies.**
- **Enable legal professionals to work the way they want with quicker, easier organization and access to multiple documents and applications.**
- **Streamline everyday tasks by providing immediate access through Jump Lists to the applications and files that professionals frequently use.**
- **Improve PC management including desktops, laptops and virtual environments with advanced image management and deployment tools that use less network bandwidth and reduce costs.**
- **Take handwriting recognition a giant step forward with greater accuracy and speed in pen input, ability to create personalized custom dictionaries for handwriting recognition, and the support of new languages.**

☑ CAN YOU PROVIDE MORE DETAILS AROUND THE WINDOWS 7 FEATURES THAT LAW FIRMS WILL BE ABLE TO UTILIZE?

Building upon our previous response, the following presents a more detailed overview of five exciting new applications that will be available in Windows 7 for Enterprises:

- **1. Enterprise Search: Helps legal professionals find the information they need faster and more easily.**
Legal professionals need to access information on matters from a variety of sources in their daily tasks. With Windows Vista, Microsoft introduced advanced desktop search technology, enabling users to instantly find information on their computers. With Microsoft Office SharePoint Server 2007 and the Enterprise Search family of products, Microsoft delivered highly secure and manageable server-based search. Windows 7 brings these experiences together and provides users with an improved and seamless search experience across local and networked corporate data directly within Windows Explorer. Users will be able to:
 - Utilize a more intuitive approach to finding and organizing information with advancements to the Windows 7 user interface (UI) and recommendations based on recent searches.

- Gain a new way of accessing documents, presentations or any type of file that might be located in different folders, hard drives, or even computers — in a single view “Library.”
- Search multiple locations such as electronic document repositories, SharePoint sites, and Web applications as easily as they search their desktops from a single interface with “Search Federation” or OpenSearch.
- Make content on intranet portals more discoverable and accessible with Enterprise Search Scopes in Windows 7.

- **2. DirectAccess: Enhances productivity for mobile workers, improves security and manageability for IT**

DirectAccess in Windows 7 and Windows Server 2008 R2 enhances the productivity of mobile workers by connecting them seamlessly and more securely to their corporate network any time they have Internet access — without the need to connect to a VPN. When IT enables DirectAccess, the whole corporate network file shares, intranet Web sites, and line-of-business applications can remain accessible through an Internet connection. DirectAccess:

- Empowers IT administrators to manage mobile computers by updating Group Policy settings and distributing software updates any time the mobile computer has Internet connectivity, even if the user is not physically in the office or logged on to a VPN. This flexibility gives the firm's IT team the opportunity to service remote machines on a regular basis and ensures that even when mobile, attorneys can stay current with company policies.
- Enhances security and access control by authenticating the computer and the user, and supports multifactor authentication, such as a smart card. IT administrators can configure which intranet resources specific attorneys and support staff can access using DirectAccess.
- Keeps data safer as it travels through public networks by using IPv6-over-IPsec to encrypt communications transmitted across the Internet.
- Reduces unnecessary traffic on the firm's corporate network by sending only traffic destined for the network through the DirectAccess server running Windows Server 2008 R2. (The administrator can also choose to send all traffic through the corporate network.)

- **3. BranchCache: Improves application responsiveness and increases branch office productivity**

For law firms with several locations, BranchCache in Windows 7 can help increase network responsiveness of applications, providing users in remote offices an experience more like

working in the main office. When accessing content stored on Windows Server 2008 R2, professionals working in a branch office won't need to wait as long to download files from headquarters. A copy of data accessed from an intranet website or a file server is cached locally within the branch office. When another professional on the same network requests the file, the user gets access to the content almost immediately as it is downloaded from the local cache rather than over a limited bandwidth connection back to headquarters. BranchCache:

- Ensures that content is served to users who have the right permissions and always checks to make sure it is delivering the latest version of the file.
- Decreases bandwidth utilization between headquarters and the branch since BranchCache only caches read requests. It will never interfere with a user saving a file.
- Works seamlessly with network security technologies including SSL, SMB Signing and IPsec to improve application performance even if the content is encrypted.
- **4. AppLocker: Helps to prevent unauthorized software from running for better control of user desktops**

Downloading of unauthorized software is something every law firm seeks to avoid. It can cause a higher incidence of malware infections, generate more helpdesk calls and undermine efforts to standardize the firm's desktops. With the vast number of applications available on the Web, IT professionals need sophisticated tools to ensure the firm's professional users work with only approved, licensed software. Windows 7 offers new application control policies with AppLocker, a flexible, easy-to-use mechanism that enables IT professionals to specify exactly what is allowed to run on user desktops. AppLocker:

- Restricts unauthorized software while allowing applications, installation programs and scripts that users need so that IT professionals can realize the security, operational and compliance benefits of application standardization.
- Provides simple, rule-based structures for specifying which applications can run and be centrally managed using Group Policy. It introduces publisher rules that are based on an application's digital signature, making it possible to build strong rules that account for application updates.

NOTED ON THE NEWSWIRE:

Microsoft Helps Businesses Manage Their Carbon Footprint and Identify Cost-Saving Opportunities

New Environmental Sustainability Dashboard for Microsoft Dynamics AX enables midsize businesses to track their environmental impact and energy consumption from within their ERP solution. In early February, Microsoft Corp. announced the general availability of the Environmental Sustainability Dashboard for Microsoft Dynamics AX. The new toolset, available to Microsoft Dynamics AX 2009 customers at no additional charge, will enable midsize businesses to capture data needed to measure key indicators related to energy consumption and greenhouse gas emissions as part of everyday business processes from within their enterprise resource planning solution, helping them pinpoint ways to cut their energy consumption and costs.

With the new solution, companies can collect auditable data on four of the core environmental performance indicators identified by the Global Reporting Initiative for energy consumption and greenhouse gas emissions, including direct on-premise fuel consumption and the carbon footprint of their power usage with utilities and other vendors. Based on this information, organizations can monitor their carbon footprint and institute business practices that are both environmentally and economically sustainable, minimizing their exposure to fluctuating energy costs, for example.

The dashboard delivers new functionality that is highly sought after by customers. In a recent survey of 130 IT procurement and operational professionals by Forrester Research Inc., 55 percent expressed interest in reducing energy-related expenses, and 50 percent expressed interest in doing the right thing for the environment. ("Five Steps to Building a Recession-Proof Packaged Applications Strategy," Forrester Research, December 2008).

The new dashboard harnesses Microsoft Dynamics' groundbreaking RoleTailored design, which equips employees with a personalized Role Center based on the information they need to do their job. The dashboard itself serves as the environmental manager's Role Center, delivering the information crucial to performing that job. Furthermore, these reports can be easily surfaced within employees' individual Role Centers within Microsoft Dynamics AX 2009 or other familiar productivity tools, such as Microsoft Office SharePoint Server. This allows organizations to increase their internal transparency, drive employee engagement and rapidly raise awareness of environmental initiatives, and propagates green practices and frugal energy usage companywide, embedding them firmly in organizational culture.

About Microsoft Dynamics

Microsoft Dynamics is a line of financial, customer relationship and supply chain management solutions that helps businesses work more effectively. Delivered through a network of channel partners providing specialized services, these integrated, adaptable business management solutions work like and with familiar Microsoft software to streamline processes across an entire business.

- Supports the creation and execution of correctly structured rules enabling IT professionals to safely deploy application updates without having to build a new rule for each version update.

- **5. Virtual Desktop Infrastructure: Supports the deployment of virtual desktops more efficiently and with an improved user experience**

Delivering desktop functionality using virtual machines hosted on servers — a solution known as Virtual Desktop Infrastructure (VDI) — is an emerging model at law firms. The benefit of this fast-evolving technology is that it enables users to access their desktops remotely, thereby centralizing data, applications and operating systems. Windows 7 delivers the latest enhancements for VDI to provide a richer user experience and easier management for IT. Virtual Desktop Infrastructure:

- Provides users with an experience that is closer to a local PC experience. It supports the Windows Aero interface, video viewing in Windows Media Player 11, and multiple-monitor configurations. New microphone support enables remote desktops running Windows 7 Enterprise to provide voice over IP (VoIP) and speech recognition functionality. And, the new Easy Print technology enables users to print to local printers without the need to install printer drivers on the server.
- Provides common tools for physical and virtual images so that IT professionals can use the same Windows image management tools and processes to manage both native WIM-based system images and Windows 7-based virtual machine images (VHDs). This enables offline servicing of VHD files to add, remove and enumerate patches, language packs, drivers and other components of the operating system image.

📌 WHEN WILL WINDOWS 7 BE GENERALLY AVAILABLE?

Microsoft is currently in the development stages for Windows 7, and we expect that it will take approximately three years for Windows Vista Consumer General Availability (GA) to develop. The specific release date will be determined once the company meets its quality bar for release.

📌 WHAT IS YOUR RESPONSE TO THE NOTION THAT LAW FIRMS SHOULD LEAPFROG WINDOWS VISTA AND WAIT FOR THE RELEASE OF WINDOWS 7?

Adopting a new operating system in an enterprise environment is never a simple undertaking. Therefore,

we are advising our customers to deploy Windows Vista and Microsoft Desktop Optimization Pack today for an easier migration to Windows 7 in the future.

Windows 7 is designed to minimize deployment challenges and costs — particularly when upgrading from Windows Vista — as both operating systems are built on the same underlying foundation. Investments in Windows Vista deployment today will pay off when deploying Windows 7 in several areas including:

- **Hardware:** Investments in hardware capable of running Windows Vista will largely carry over to Windows 7. Microsoft's goal is that computers that run Windows Vista well will run Windows 7 as well, if not better.
- **Applications:** Much of the work done to mitigate applications in Windows Vista will carry over to Windows 7 deployments due to the underlying similarity of the two operating systems and efforts by Microsoft and its partners to provide compatibility.
- **Deployment:** The significant advances in deployment introduced with Windows Vista is continued in Windows 7 with enhanced system imaging, image delivery and data migration tools to improve the end-to-end deployment experience.

📌 WHAT ENHANCEMENTS HAS MICROSOFT MADE TO WINDOW VISTA SINCE ITS INTRODUCTION?

In addition to offering the smoothest upgrade path to Windows 7, Windows Vista SP1 offers the most advanced and secure Microsoft operating system on the market. In the first six months of availability, Windows Vista has seen fewer vulnerabilities compared to other tracked operating systems (including Windows XP, RH Enterprise Linux, Ubuntu, Novell SUSE Linux ED & Mac OS X 10.4 (Tiger). Enterprise customers have reported the following capabilities proven to drive performance and cost-savings:

- **Enhanced security.** With a significant percent of law firms' client environments composed of mobile computers, removable drives and USB thumb drives, ensuring laptop security is critical. With Windows BitLocker Drive Encryption, firms can safeguard their data in the event of a lost computer. With User Account Control in Windows Vista, firms can implement a more controlled desktop environment. The IT staff can provide credentials for elevated access on a case-by-case basis. As a result, firms can better control their client environment without restricting attorneys' work for a safer, more stable and predictable computing experience.
- **Reduced costs.** By limiting user rights, law firms can reduce administrative overhead from managing unauthorized applications and changes to the client computer. In addition,

because the operating system image and software applications will be installed using standard tools and processes that the IT department can control, firms can expect to spend less time determining the current state of their client computers.

- **Reduced energy usage.** Companies in every industry are facing increasing pressure to lower energy consumption. Law firms can use the power management features in Windows Vista to meet their energy-saving goals. By centrally managing power states, workstations that used to stay on, even when not in use, can now be put to sleep during periods of inactivity.
- **Improved employee productivity.** Current users have reported an increase in user productivity with Windows Vista and Office Professional Plus 2007. Using the Instant Search feature, law professionals can spend less time managing, organizing and searching for files. Instead, they can search and get fast results as they type

— quickly accessing the information they need to do their jobs more effectively.

HOW IS MICROSOFT INVOLVING ITS LEGAL SOFTWARE PARTNERS IN THE WINDOWS 7 LAUNCH TO ENSURE COMPATIBILITY?

Microsoft kicked off the Windows 7 and Windows Server 2008 R2 Ecosystem Readiness Program at the start of the year. These programs provide partners with the resources they need to ensure that their existing applications, devices and systems are compatible with Windows 7 and Windows Server 2008 R2 and to ensure a wide range of high-quality Windows 7 software-based solutions will be ready for customers. The program delivers great development, training and testing resources, including beta builds, development and test toolkits, technical documents and application testing labs.

Software partners can join by going to: www.msdn.com/windows.

Hardware partners can go to the Windows Hardware Developer Central (WHDC) site to access the program at: http://www.microsoft.com/whdc/Win7_Beta.mspx. **ILTA**

When Will Your Firm Deploy Office 2007?

by Kara Portwood of Armstrong Teasdale LLP

ILTA's Microsoft Peer Group first posed this question to the ILTA membership in a survey distributed in June 2008. Since the initial survey, many economic constraints have been imposed on firms, and IT professionals are being asked to do more with less. It is a given the initial results of the survey are now obsolete.

In an effort to gain a better understanding of deployment of Office 2007 in the legal community, in January 2009, I personally reached out to 100 member firms who responded to the initial survey. The following chart provides the responses both from the initial survey and the follow up.

While these responses reflect only 100 members of the ILTA community, it truly gives us a sense that firms have pushed back Office 2007 deployment at least until the end of this year. Most firms discussed initiatives underway to better prepare the firm for deployment and to better prepare users by leveraging some of the online resources available from Microsoft.

All six firms that deployed Office 2007 report users are very happy with the new User Interface and feel their

users are more productive because of the ability to easily find features/functionality inside of Office 2007.

We will continue to monitor firms as they progress through their Office 2007 deployment initiatives. **ILTA**

Months Until Firmwide Deployment	Firm Response as of June 2008	Firm Response as of January 2009
Deployed	0	6
0-6 months	20	8
7-12 months	75	32
13-18 months	5	53
19-24 months	0	1
Total Number of Firms	100	100

Lessons Learned in Deploying Office 2007



While the Office 2007 system brings increased productivity, accelerated user acceptance and a stable, secure and agile environment, many firms don't know where to begin when planning for deployment. In an industry where Office applications — particularly Microsoft Word — are mission-critical, it is essential that your users and your firm realize the benefits of productivity and stability through utilization of informed design, definition and planning.

Based on my experiences working with firms in varying stages of implementation, I can offer some guidelines to ensure user acceptance, accelerated adoption and the ability to recognize effective new workflows. What follows are real-world lessons learned from early adopter firms of various sizes and an invitation to construct the document platform for the next decade.

ADOPTION INSIDE LEGAL

The entire firm-client relationship is defined by the documents kept. When considering the stages of client engagement, document workflow connects and records each and every phase. Unlike previous Office implementations, client engagements — and our documents — herald a new economy and reach far beyond any one ZIP Code or national border. Now, more than ever before, firms compete globally and must approach document platforms and associated tools with an extended, or should we say, extensible, reach.

Fortunately, Office 2007 comes with attributes to meet this approach: a fluent interface (otherwise known as the “ribbon”), an open file format — XML — and seamless connectivity with applications and internal and external networks. Not only does the ribbon interface make it easier for users to find the tools they need, it provides an environment that can be leveraged to further enable document workflows, improved document processes and, best of all, an improved user experience.

At the core of Office 2007 is XML. From the document file formats to the ribbon, Microsoft has committed to an open and extensible standard. This means the manipulation of documents or launch of automated workflows can occur without the Office application itself. Imagine creating an entire family of documents that support the intake of a new client — engagement letters, associated waiver letters — without ever launching Word. Unleashing this digital document workflow is made possible by the Office 2007 system and third-party software applications that fully leverage it. The result? Legal finally sheds its \$2,500 typewriter, unleashing digital document workflows previously impossible.

With the radical redesign of the Office 2007 fluent interface, many firms worry about the impact to their users. As you will learn from your early adopter peers, this fluent interface creates an improved, more intuitive user experience than Office deployments of the past. Two to four weeks into the learning curve, document producers report being more productive than before the upgrade.

ADOPTION STRATEGIES AND LESSONS LEARNED

Through our experiences guiding and supporting clients in their Office 2007 implementations, we've learned some lessons and discovered how early adopter firms have leveraged their adoption techniques. This has led us to the development of a five-stage rollout strategy.

STAGE1: DOCUMENT EXCHANGE AND COLLABORATION

By now, every firm should be fully armed to meet the requirements of the document exchange and collaboration stage. Firms currently using a previous version of Office should have looked at, evaluated, tested and deployed Microsoft's Compatibility Pack.

Freely downloadable from Microsoft, the Compatibility Pack is a collection of file open and file save filters for Word, PowerPoint and Excel. It allows Office 2000, XP and 2003 applications to open the "x-files" created in Office 2007, where they can be edited, printed or saved — all while maintaining visual fidelity, file format fidelity and the file name. (Note: When integrated with a document management system, some limitations may exist. Check with your DMS vendor for current capabilities.)

The document exchange and collaboration stage creates the on-ramp for power users to embark on the other four stages of deployment. This is an exceptional way to get your users to understand the capabilities and enhancements of 2007, the limitations of the Compatibility Pack and where and how third-party tools are needed.

LESSON LEARNED: SAN DIEGO-BASED FIRM, 28 OFFICES

This firm's current environment is Office 2003. The firm receives Office 2007 documents from its early adopter clients, and it identified early on that first on its to-do list was to build and prepare an Office 2007 project team. The team would be charged with getting reacquainted with Word's native functionality, and to focus on the new features of Word 2007 that may impact decisions on add-ins from third-parties. Recognizing Microsoft had fully "tricked-out" Word 2003, the team wanted to determine the professional-level tools they would or wouldn't need when rolling out 2007. Additionally, it needed to become familiar with the functionality of the new Office system, given clients' adoption and the likelihood these features were being used in documents the firm received.

The project team jumpstarted its efforts with a one-day session, first to learn the new features and functionality. This evaluation helped the team recognize where third-party tools were needed to enhance the 2007 document production environment, and where document exchange and collaboration issues might occur.

After this meeting, Microsystems worked with the team to form specific plans for its document exchange and collaboration phase, most likely lasting 12 months. We presented a deep-dive session on considerations of the variances associated with document exchange, and the impact on collaboration between a firm on 2007 and one on 2003. Utilizing a Chicago-based classroom, and broadcasting to six of the firm's offices, we worked through pre-built documents that reflected a typical collaboration trail. This allowed the team to develop best practices around managing the workflow between now and the time the firm deploys.

STAGE 1: DOCUMENT EXCHANGE AND COLLABORATION — RECOMMENDED TASKS

- **Download Compatibility Pack**
- **Verify prerequisites**
- **Verify third-party support**
- **Test, then deploy Compatibility Pack**
- **Identify document experts**
- **Create 2007 playground**
- **Investigate all new features**
- **A pre-built document test collection**
- **Try on third party solutions in Office 2007**
- **Find the feature gaps**
- **Identify lead subject matter experts**
- **Inventory current desktop**
- **Jumpstart user training**
- **Solicit user requirements**
- **Network with peer firms**
- **Work in "compatibility mode"**
- **Identify strategies, goals**

STAGE 2: PLANNING

During the planning stage, the spotlight should be deeply focused on the user community. Why? In the decade since desktop technologies were last refined, roles of support staff, lawyers and the business climate they serve have seen significant shifts. As such, the automation that law firm IT departments provide may not adequately address the work requirements they have today, nor those anticipated in the decade ahead.

One way to begin would be to inventory the current state of your firm's document production environment by gathering a list of user requirements. Several research methods can be employed here. Consider surveying the users about their needs, annoyances and the holes that exist within the current environment. A focus group may be an efficient method of collecting user requirements. Also, consider face-to-face interviews that involve live environment walk-throughs. This research helps you establish goals and tenets for software selection, document design, interface design and deployment strategy.

Software selection: The goal is to rethink your entire document automation applications and processes. While the "desktop" has been a PC for two decades, it may be virtual or Web-based in the future. How does that influence decision and definition processes? Take this opportunity to define a process and criteria for selection of third-party automation vendors. Consider vendors that are professionally aligned with Microsoft, ones that help maximize your Microsoft investment. Determine if current vendors are investing in the technology that ensures they will be able to offer support for the next decade.

Document design: Another part of the planning stage is to update or rebuild templates. This step is an opportunity often underappreciated or overlooked altogether. Revisit some of the design choices made in the past such as how do you define your styles, numbering and branding, or how do you automate and maintain commonly reused content? Such considerations will help you realize a much more agile environment in the years ahead.

Interface design: Because the Office 2007 interface has changed significantly, the initial reaction of knowledgeable support staff may be one of apprehension. Ironically, the interface change is your best advocate for adoption and user acceptance: spend time planning what your interface is going to be. Define what tabs and functionality your ribbon(s) will incorporate, and involve the users early on. These decisions and this communication will ensure users are aligned and will reveal requirements often overlooked.

It is also very important to enlist and engage individuals and groups within your organization such

as human resources and marketing. These groups can help communicate the objectives of the rollout. The better you deploy the communication, the better you'll deploy the application.

LESSON LEARNED: TROUTMAN SANDERS LLP, 11 OFFICES

Troutman Sanders LLP is considering an Office 2007 migration in 2009 to provide the best tools and practices to efficiently produce documents.

STAGE 2: PLANNING — RECOMMENDED TASKS

- **Inventory current state**
- **Build, deploy "playground"**
- **Download MSFT learning**
- **Establish goals and tenets**
 - Software selection
 - Document design
 - Interface design
 - Deployment strategies
- **Interview vendors**
- **Define RFI process, issue RFI**
- **Gather user requirements**
 - Formal process?
 - Resources for process?
 - Organizational changes?
- **Identify lead business users**
- **Isolate drivers, justifications**
 - Alignment to other projects?
 - Sequencing to other projects?
- **Enlist HR, marketing, practices**
- **Institute educational initiatives**
 - Skills Assessment?
 - Refresh training?
 - Automation review?
- **Audit all templates, forms**
 - Automation?
 - Menus/customizations?
 - AutoText?
 - Styles?

STAGE 3: PILOT

An effective strategy among early adopter firms is to conduct multiple pilots — for IT and for the end-user. Pilots should be quick and focused on one aspect of the deployment. IT pilots will vet stability, integration aspects and continuity between applications and should test for challenges. User pilots should be conducted in a similar manner; except that lawyers and assistants should run through common workflows to identify gaps.

A key to pilot success is to communicate the scope and expectation of the pilot and establish an open understanding with the testers. It is important for the tester to know that not everything will be perfect, but that you are looking for very open, meaningful and specific feedback.

During your pilot process, just as when you deploy, you will need to fold in hotfixes and acquire updates (to the operating system and/or the Office edition itself). Plan for these so that you identify, in advance, what the communication mechanism is to fold these in. Do not wait until the end of the pilot to do this.

Another key is to identify staffing of quality control (QC) processes. Determine if there will be focused resources for QC or if the QC persons will be embedded within each of the user pilot groups. Determine if you will include internal resources for the QC process, or if it will be outsourced. Given this key aspect of the project, adequately anticipate requirements for design and integration documentation.

LESSON LEARNED: CHICAGO-BASED FIRM, 20 OFFICES

This firm is planning to have its Office 2007 rollout complete by Q3 of 2009 and is currently working in Office XP. It wanted to accelerate deployment of Office 2007 in an effort to improve the stability of its documents and of its users' desktops.

The firm created a Citrix playground to survey the users. As the users left the playground, feedback was provided right then and there. The immediate feedback was extremely beneficial and provided good insight, which the firm then rolled into its test plans and communications.

The firm mapped out the project by role and assigned tasks to specific team members and also assigned an administrative assistant to the project for the preparation and scheduling of meetings. This was very helpful, as it freed up IT time for very focused and efficient work.

In preparation for its rollout, this firm removed all VBA-based programs from the desktop; it wanted to tackle all of the things it could before fully migrating to 2007. The firm also ultimately converted an important set of its Office XP toolbars into Word 2007 ribbons, which facilitated practice area workflows.

STAGE 3: PILOT — RECOMMENDED TASKS

- **Plan more than one**
 - IT pilots (with goals)
 - User pilots (with goals)
- **Leverage SharePoint**
- **Identify diverse group**
- **Create an agreement**
 - What users should expect?
 - Communicate goals
 - Provide jumpstart info, time
- **Identify deployment approach**

- **Acquire hotfixes, updates**

- **Quality control**

- External resources
- Internal resources
- Current state

STAGE 4: ROLLOUT

As you approach this stage, it is critical to communicate the goals and expectations to the firm's leadership, practice area heads and support areas. Also important is to enlist human resources to partner in managing the change and transition for your users, freeing up IT to focus on those able to keep pace with the rollout and its learning events.

Do not dismantle your project team once this stage is completed; rather, let this team remain intact to function as an early warning system for potential issues and to further evangelize the Office 2007 implementation. Additionally, this team can effectively market and gather requirements for a second phase of training. This gives users peace of mind that they have an added opportunity to solidify understanding of new or advanced functionality.

LESSON LEARNED: CLIFFORD CHANCE LLP, 28 OFFICES

Clifford Chance LLP began its deployment to Office 2007 in Q4 of 2008. The firm had a number of goals and drivers, but primarily wanted to create a truly unified global desktop. Not only did it want to improve its document production workflows, but wanted to lower its maintenance costs as well. With the adoption of Office 2007 and additional software — DocXtools and D3, which leverage XML and seamlessly integrate with Word 2007 — the firm created a cohesive, global document production environment. As a result, Clifford Chance LLP simplified the development and its use of templates, minimized the number of third-party applications, reduced its IT maintenance and support costs and provides its users with a better solution for styling, comparison and overall document creation.

"Our deployment of a global desktop is a huge achievement for us. It has empowered our users to quickly produce document first drafts with accurate, firm-approved content, resulting in greater productivity, enhanced profitability and improved client service," said Robert Webb, of Clifford Chance LLP.

STAGE 4: ROLLOUT — RECOMMENDED TASKS

- **Expectation setting at all levels:**
 - Firm leadership
 - Practice heads
 - Support areas
- **Professionally trained staffing**
 - Strong empathy
 - Problem solvers
- **Enlist HR (for resistant users)**

- **Can marketing help?**
- **Well-planned design will evolve**
 - UI-enabler on the team
 - Do not dismantle focus groups
- **Enroll your vendors (they are team members)**
 - Know their requirements
 - Drive them
- **Guard gates and intersections**
 - Third-party integration points
 - Physical office migration stages
 - Client collaborations
- **Monitor capture systems**
- **Flexible training schedule**
 - Well-timed familiarization
 - “There will be a phase II”
- **Tee up for phase II**

STAGE 5: POST ROLLOUT

After Office 2007 is deployed firmwide, consider and plan for the unveiling of the rest of Office, including applications such as OneNote, Visio, Communicator, Groove or SharePoint. Also consider the server side extensions of Office for Excel and Project. These

extensions enhance productivity and foster an even better user experience.

It is also important to keep the marketing department engaged at this stage. This communication vehicle continuously provides users with helpful tips, tricks and success stories. This group can also help publicize available learning materials to lead users into Phase II training.

LESSON LEARNED: CANADIAN FIRM, TWO OFFICES

This Canadian firm completed its migration from WordPerfect 8 to Office 2007 in Q3 2008. A firmwide initiative to improve and align technology drove its Office 2007 deployment and adoption. Microsystems helped by converting all of the firm’s WordPerfect documents into the Open Office XML (.docx) file format, which the firm adopted as its default.

The firm has enjoyed greater agility in the creation of automated document workflows. In anticipation of clients or collaborators who might not yet be on Office 2007, lawyers incorporated a link to the Compatibility Pack into their signatures in Outlook. When the lawyer was uncertain about the collaborator’s access to the Compatibility Pack, they published to PDF. The firm has enjoyed greater agility in the creation of

Document Generation Using Word 2007 OPENXML

by Marcel van Kampen of Bell Gully

New Zealand law firm Bell Gully was seeking a more efficient way to process loan applications and supply conveyancing services to lenders. Document generation, which involves document creation and content automation, presented a sure fire way to improve business efficiency. In this article, developer Marcel van Kampen looks at Bell Gully’s experience developing and implementing an MS Word based document generator (DG) that was recently ported to a server side DG that processes OPENXML Docx files.

Document Generation in Action

Document creation can range from producing one document from a single precedent to the complex creation of multiple documents. DG requires the marking up of the precedents that are used to create the documents. They have a user interface in which the precedents are opened, marked up and saved in Word format, a proprietary format or an intermediate format like xml or rtf.

The second step of preparing precedents for automation is capturing the business rules for the document generation and content automation. Generation and automation logic is captured in formulae or expressions, *e.g.*, `Insert FixedTerm.docx if AccountType=FixedOnly, Add Guarantee.docx to bundle if Borrower=Company, remove CarParkClause if JobTitle#Partner.`

The host application can be the DG itself, MS Word or a third party/in-house application that interfaces with the DG. The DG can extract its input from a database or prompt the user for the data. The user inputs can be captured for re-use to regenerate the same document or produce others.

Developing a Server Side Document Generator

My first experience with DG was an in-house development for Bell Gully in 1998, producing a Word-based generator called Lex Machina. It resided in a global template written in WordBasic and was later ported to VBA. Over the years, Lex

automated document workflows. Users enjoy a much improved and more productive experience.

STAGE 5: POST ROLLOUT — RECOMMENDED TASKS

- **Expect positive changes**
- **Continue focus groups**
 - Solicit feedback
 - Answer questions
 - Capture additional automation requests
- **Engage marketing to facilitate communication**
 - User stories
 - Continuous tips, tricks
 - Available learning materials
- **Engage phase II training**
- **Seek further opportunities**
 - Extend automation
 - Ease collaboration
 - Refine best practices

• Plan for the rest of Office

- OneNote
- Visio
- Communicator
- Groove
- SharePoint

CONCLUSION:

A successful Office 2007 migration is dependent on a firm's approach to planning and managing around the opportunities for change. Early adopter firms have already experienced improvements that unleash digital document workflows at a pace previously unattainable. In this global economy, such capability ensures the ability to meet the needs of a diverse and expanding client base. **ILTA**

Machina has generated documents from requests originating from Word dialog boxes, MS Access databases, VB6 and .NET applications and Web applications.

When Office 2007 was released with its OPENXML Docx file format, it became apparent that this could be used to build a server side document generator in the shape of a .NET application that produces Docx documents without using Word itself and without Word even being installed on the server.

Microsoft has given OPENXML its full support. There are excellent publications on the Web supported by blogs from the MS product developers themselves, and you can even find useful training videos.

The OPENXML standard itself covers thousands of pages, but you can read OPENXML by Wouter van Vugt instead.

Available on the Internet, it describes the Docx file format which is in fact a zip file containing multiple directories each with multiple xml files. Starting on a new file format and new standard can be daunting, but with van Vugt's help, you'll be speaking fluent OPENXML in a couple of days.

You can extract the Document.XML from the Docx file and start editing Word documents with XMLNotepad within hours. Document.XML is the xml component in the Docx zip file that contains the body of the Word document. .NET applications

can use an assembly to open a .Docx file and access, delete, modify and add xml components. It took about a week to rewrite the core of the Lex Machina document creation features in a .NET application that reads and writes Docx files.

The Word 2007 content controls (under the Developer tab of the ribbon, revealed by selecting a Word option) are excellent for marking up Docx files for content automation.

The Project Timeline

It took a Word developer, a .NET developer and Web developer three months to develop the server side document generator using the experiences obtained from developing and using Lex Machina. The extra challenge was developing the environment for the document generator to operate in. This involved writing a Web service to receive requests, a queue handler to process them and additional services to evaluate the business rules, invoke the document generator and deliver the produced documents via the Web, by e-mail or in Word.

The end product has presented the opportunity to provide document generation outsourcing services to external parties which include marking up the clients' documents and capturing their business rules. Truly a win-win project. **ILTA**

Deployment Resources for Office 2007



Customers who've successfully adopted Microsoft Office 2007 in their business began with a deployment plan that benefited from the tools Microsoft freely provides, as well as those that are included with Software Assurance. This article provides guidance, resources and tools that will prove helpful as you undertake your deployment.

GUIDANCE RESOURCES

Deploying Office 2007 has evolved into a customized, flexible process. To help IT prepare, there are two resources that can be downloaded at any time, and a third that is made available to customers with Software Assurance.

The Microsoft Office Resource Kit 2007 is the technical guide for deploying and administering Microsoft Office 2007. It is available online at <http://technet.microsoft.com/en-us/library/cc303401.aspx> and is also available in book format. It's "one stop shopping" for knowledge related to the setup, installation and management of the client.

Microsoft Deployment Toolkit 2008 is the current version of what was Business Desktop Deployment (BDD), providing the recommended process and toolset to automate both desktop and server deployments. As a Solution Accelerator, you will find that it makes the

resource kit practical through guidance documents, scripts and other job aids. For example, through the MDT, you can plan a Lite Touch Installation (LTI) or fully automated Zero Touch Installation (ZTI) using Microsoft System Center Confirmation Manager 2007 or Systems Management Server 2003. You can download MDT 2008 from <http://technet.microsoft.com/en-us/solutionaccelerators/bb963909.aspx>.

Without question, the most requested and popular offering for desktop deployment is Desktop Deployment Planning Services (DDPS). A Packaged Services offering for customers with Software Assurance, you receive up to 15 days of technical consulting from Microsoft Consulting Services or a DDPS-certified partner to help plan and pilot deployments of Office 2007 and/or the Windows client operating system. The engagement is based on the combined knowledge and practical experiences of Microsoft Consulting Services and our partners. It will help you reduce the cost and complexities associated with deployment and will likely improve the process through automation. You can learn more about DDPS and other Packaged Services at <http://www.microsoft.com/licensing/sa/benefits/package services.msp>.

PLANNING RESOURCES

Foremost in many customers' minds is the need to assess the impact of the new Office file format on their existing documents. Office Migration Planning Manager (OMPM) evolved from the Microsoft Office Access Conversion Toolkit released several

years ago. The goal of OMPM is to assist IT with reviewing the number and types of Microsoft Office files in their environment and plan for a smooth rollout. Included in this toolset are the following utilities:

- **The OMPM File Scanner (offscan.exe) is a command-line tool that scans files and reports back conversion issues. Deployable via automated technologies such as SMS, it can save the scan results to an XML file on each computer. There are two scan types:**
 - A light scan that quickly identifies the Office documents on a user's computer or network file system
 - A deep scan on Office documents to gather properties that provide indicators of potential conversion issues
- **A reporting tool imports the XML log files generated by the OMPM File Scanner and provides further analysis, based on criteria you set, replete with Green, Red and Yellow indicators similar to those used with the Windows Application Compatibility Toolkit.**
- **The Office File Converter (OFC) converts specific files to the new 2007 Office release file formats in bulk.**

I have found that the OMPM toolset is most beneficial in addressing head-on the uncertainty customers may feel regarding the impact the Office Open XML file format will have. You can download it from <http://www.microsoft.com/downloads/details.aspx?FamilyID=13580cd7-a8bc-40ef-8281-dd2c325a5a81&DisplayLang=en>.

With the Office Customization Tool (OCT), no longer are there separate tools for setting up and managing your Office installation and Outlook client. With OCT, you now have a single tool for creating, customizing and managing Office 2007. By integrating with the Windows Installer Update (.MSP) infrastructure, automated delivery and installation across your enterprise is provided.

Local Install Source (LIS) is the method used for installing the Office 2007 client to the desktop. Combined with BITS (Background Intelligent Transfer Service) you can stream your Office 2007 package to the desktops with either foreground or background priority, then disconnect from the server while completing the installation unattended. LIS copies the installation media and OCT setup to the local drive (in a hidden cache), then allowing the Setup program to run. If any part of the installation script you develop is not successful, Setup stops and rolls back to the previous installation. This is a great way to

minimize the workday impact of rolling out Office 2007, while ensuring that your users get the best experience. You run the OCT by typing `setup.exe/admin` on the command line.

TRAINING RESOURCES

The best technical planning and implementation can't take the place of preparing end users, your customers, for their new Microsoft Office experience. This is your chance to help them learn of easier ways to complete familiar tasks and discover new capabilities, increasing their productivity and satisfaction.

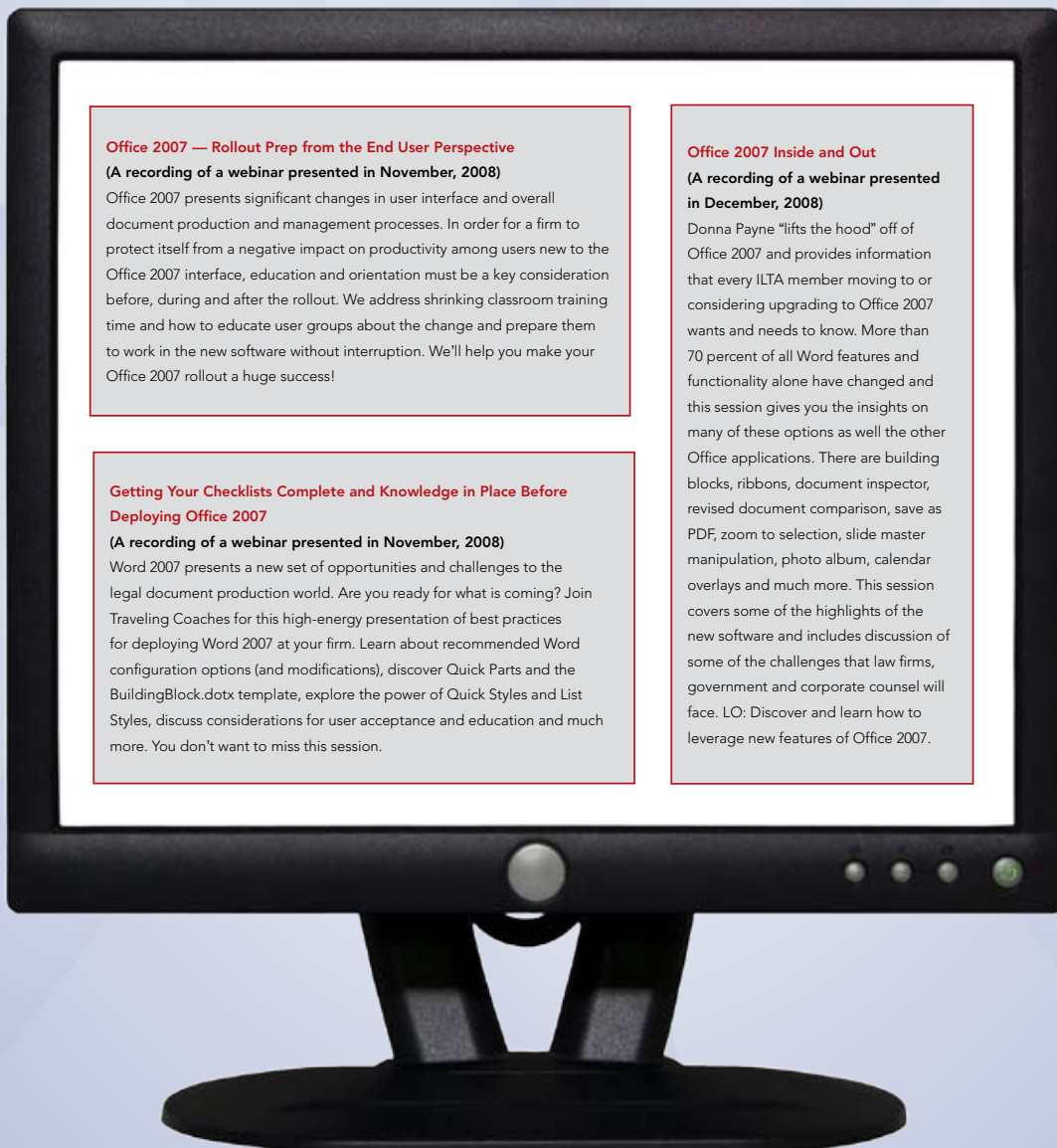
Office Online (www.microsoft.com/office) is the source for learning more about the products that make up the Microsoft Office system and the resources available to help end users get the most out of it. Included in this site is a Help & How-To section, with free online training, demos and podcasts. Additionally, these are three learning resources that are frequently implemented:

- **Get Started Tabs** are interface guides that provide an interactive way for users to see the classic menu and the equivalent commands in the Fluent UI ("the Ribbon"). I would encourage everyone to add this into their deployed image. <http://office.microsoft.com/search/redir.aspx?assetid=HA102295841033&CTT=96&Origin=CL100605171033>
- **Mapping workbooks** provide a list of the entire Office 2003 menu and toolbar commands and their locations in the 2007 Office system, in Microsoft Office Excel format – a great resource for the support staff to keep handy. <http://office.microsoft.com/en-us/training/HA102295841033.aspx#2>
- **Office Online** provides a wealth of learning tools, which can be overwhelming when planning your end user training. The Enterprise Learning Framework (ELF) helps to create a training and communication plan by asking a series of questions about the deployment timeline, types of users and applications being deployed. ELF identifies the most relevant learning topics and returns a list of recommended topics with links to Office Online content. It will even build an e-mail message or HTML page for communicating the content to your end users. <http://www.microsoft.com/technet/desktopdeployment/bdd/elf/welcome.aspx>

For customers with Software Assurance, there is also the Home Use Program, which provides your employees with Office 2007 to use at home, helping to increase familiarity, productivity and job satisfaction. Through this benefit, employees pay only shipping and handling to obtain a licensed copy of Microsoft Office 2007. You can learn more at http://www.microsoft.com/licensing/sa/benefits/home_use_rights.mspx.

There are abundant resources on every aspect of Microsoft's products from the ILTA website.

Visit www.iltanet.org and type "Microsoft" as your search term, or limit your quest to a more specific target. You'll find links to recorded webinars, upcoming events, current and past publications and more – all focused on your area of interest. The results for a search on "Office 2007" yielded these and many more:



Office 2007 — Rollout Prep from the End User Perspective
(A recording of a webinar presented in November, 2008)

Office 2007 presents significant changes in user interface and overall document production and management processes. In order for a firm to protect itself from a negative impact on productivity among users new to the Office 2007 interface, education and orientation must be a key consideration before, during and after the rollout. We address shrinking classroom training time and how to educate user groups about the change and prepare them to work in the new software without interruption. We'll help you make your Office 2007 rollout a huge success!

Getting Your Checklists Complete and Knowledge in Place Before Deploying Office 2007

(A recording of a webinar presented in November, 2008)
Word 2007 presents a new set of opportunities and challenges to the legal document production world. Are you ready for what is coming? Join Traveling Coaches for this high-energy presentation of best practices for deploying Word 2007 at your firm. Learn about recommended Word configuration options (and modifications), discover Quick Parts and the BuildingBlock.dotx template, explore the power of Quick Styles and List Styles, discuss considerations for user acceptance and education and much more. You don't want to miss this session.

Office 2007 Inside and Out
(A recording of a webinar presented in December, 2008)

Donna Payne "lifts the hood" off of Office 2007 and provides information that every ILTA member moving to or considering upgrading to Office 2007 wants and needs to know. More than 70 percent of all Word features and functionality alone have changed and this session gives you the insights on many of these options as well the other Office applications. There are building blocks, ribbons, document inspector, revised document comparison, save as PDF, zoom to selection, slide master manipulation, photo album, calendar overlays and much more. This session covers some of the highlights of the new software and includes discussion of some of the challenges that law firms, government and corporate counsel will face. LO: Discover and learn how to leverage new features of Office 2007.

www.iltanet.org

Other resources that benefit end user training include:

- **Tips & Tricks for Microsoft Office**
<http://www.microsoft.com/office/greattips/products.mspix>
- **2007 On-Demand Webcasts**
<http://www.microsoft.com/office/greattips/on-demandlist.mspix>
- **Office system Tips & Tricks Windows Vista sidebar gadget**
<http://gallery.live.com/livetItemDetail.aspx?li=23353790-9689-4ff8-9dc4-64306756f8fe&wa=wsignin1.0>
- **Live Webcasts**
<http://www.microsoft.com/office/greattips/byformatLiveWeb.mspix>
- **The 2007 Microsoft Office System Learning Portal**
<http://www.microsoft.com/learning/office2007/iworker/default.mspix>

With these resources, you'll well-armed for deployment and ongoing end user support as you implement Office 2007. **ILTA**

NOTED ON THE NEWSWIRE:

Extending Office Productivity on the Web

Microsoft announced the next version of Microsoft Office will include Office Web applications that will help improve productivity and enhance the desktop experience by enabling people to access, create, edit, share and collaborate on Office documents across multiple devices. Office Web applications for Microsoft Office Word, Excel, PowerPoint and OneNote will be available to individuals through Office Live, and to businesses through a hosted subscription and existing volume licensing programs. This new offering will be compatible with familiar Web browsers from Internet Explorer, Firefox and Safari. Microsoft will release a private Technical Preview of Office Web applications later this year. In the meantime, customers interested in learning more about the upcoming beta availability are encouraged to sign up for Microsoft Office Live Workspace at <http://www.workspace.officelive.com>

We're talking about Office 2007 online right now.

ILTA MEMBERS, join your peers online in the ILTA E-Group discussion forums. This popular member benefit is a members-only, topic-driven, online forum designed to improve communication among peers. There is no better place to get advice, exchange ideas, learn from first-hand experience and benefit from the knowledge of other legal IT professionals.

How does it work?

Log in to E-Groups from the ILTA homepage and subscribe the forums that interest you. New posts and replies will be sent to your e-mail inbox as often as you like. Post a message or reply of your own to get answers and recommendations from your peers.

Who can subscribe?

Any employee of a member law firm or law department can subscribe to any ILTA e-group.

TAKE THE CONVERSATION ONLINE



Planning Your Office 2007 Rollout Strategy? Think Again!



The introduction of the new XML file format in Microsoft Office 2007 represented a major change in the technology behind the Office suite. Replacing the traditional menus and toolbars with a single palette of commands — called the ribbon — represents a major overhaul of the user interface (UI), making Office 2007 distinctly different from previous versions.

A common question about Office 2007 concerns the amount of training required for employees to get up to speed. The functionality of the product is essentially unchanged. So for ordinary users, learning the new UI only requires a brief introduction to the ribbon, which organizes commands into tabs. However, for power users — law firm secretaries — the question of training opens a Pandora's box of largely overlooked skill deficiencies.

Consider this alarming statistic: legal secretaries across the U.S. today are only 64 percent proficient in legal document production. Simply put, most secretaries

do not have a solid grasp of Microsoft Word, nor do they follow best practices or standards for legal document production. This not only hinders a firm's ability to be productive and competitive, it also impacts the bottom line as a huge cost.

As business demands drive firms to increase secretarial workloads, the technical skills gap for legal secretaries grows. Although this reality is hard to face, the fact is that many legal secretaries just don't know how to use Microsoft Word, and things will only get worse after the Office 2007 upgrade. That means productivity and responsiveness to client needs will not improve, but rather, plummet. So, what's the answer to this predicament?

RETHINK YOUR STRATEGY AND PLAN IN ADVANCE

Before looking ahead, let's take a brief backward glance. Many law firms have traditionally used software rollout training as a means to teaching employees everything they should already know about the software, making the argument that a rollout offers a one-time opportunity for a captive audience. The flaw

in this shotgun approach is that it inflates the cost and complexity of an already expensive and complicated IT project. Additionally, this tactic doesn't improve the rollout experience from the learner's perspective, nor does it promise that employees will master everything crammed into training, including changes in the software that will affect how they work.

Indeed, an Office 2007 rollout creates the perfect storm by exposing the need to raise performance standards so that secretarial skill levels are consistent across the firm. Additionally, underestimating the critical role that training plays in addressing the underlying skill deficiency — and ignoring the need to mitigate this risk — can leave the rollout open to failure.

DELIVER TRAINING THAT SOLVES BUSINESS PROBLEMS

In the planning that occurs six to 12 months prior to an Office 2007 rollout, training departments should ask how to design and leverage the rollout as a learning experience that helps secretaries significantly improve their document production skills. This calls for a bold and comprehensive Office 2007 rollout strategy, one that not only ensures secretaries master the fundamentals of Microsoft Word, but also prepares them to use the new UI of Office 2007.

Because training departments in law firms face increased cost pressure and decision scrutiny from managing partners, a compelling training strategy is required, one that is tied to specific and clear business goals and has key individuals' support. In order for a firm to successfully improve client service, increase attorney-to-secretary ratios and provide better desk coverage across teams, it is important to identify tangible outcomes such as improvements in secretarial performance, an increase in productivity and a reduction in costs. By implementing a training platform that supports these goals, training departments will capitalize on the potential to deliver training that has real business impact. They will also be able to provide senior management with usable information that will improve efficiency in document production, drive the bottom line and more effectively serve the firm's clients. Additionally, they'll reap the benefit of gaining information that can be used to improve the cost effectiveness and efficiency of their own program.

IDENTIFY SKILL GAPS TO DETERMINE CORE TRAINING NEEDS

The first step to ensuring secretaries master the fundamental skills needed to be proficient in legal document production is to identify specific training requirements before the Office 2007 upgrade. Skill

assessment will do the important job of pinpointing critical skill gaps and provide an accurate blueprint for training that ensures secretaries acquire expertise and achieve greater performance.

Why is it important to assess the document production skills of secretaries before rolling out Office 2007? Since the functionality of Microsoft Word is virtually the same as previous versions, core competencies for document production have not changed and standards and best practices remain the same. If skills are measured in an Office 2007 environment, secretaries are more likely to score lower due to distractions from the new UI. Conducting a document proficiency assessment using the firm's current desktop will enable secretaries to perform better and produce more accurate data needed to prepare a training platform that best supports the rollout.

By using this assessment data and implementing a prescriptive training program, law firms can provide only the training that is necessary to address skills gaps. This strategy not only reduces training costs associated with the upgrade, but also saves significant training time and resources. Providing targeted training before the Office 2007 upgrade will allow secretaries to focus on improving legal document proficiency, which is essential to addressing the current skill deficiency. Once this training is completed, specific training for Office 2007 can then focus on the new UI, which will take considerably less time.

MEASURE AND TRACK THE RESULTS

Ultimately, measurement and metrics will reveal what your employees learn and how this learning impacts the firm's bottom line. Law firms are best positioned to achieve real success in improving secretarial skills if they have a learning management system (LMS) in place to identify learning activities, schedule and track relevant training, report on progress, and provide data to measure performance improvement. By integrating assessment with an LMS, law firms can proactively address the learning needs of secretaries by providing customized learning plans based on assessment results. Because learning plans assign specific training requirements, they improve document production skills by appointing individual learning goals for each secretary.

To ensure the success of your Office 2007 upgrade and make certain it benefits business, make assessment and measurement a critical dimension of the training program you design to support the rollout. With the assessment data you collect before and after training, you'll be able to show concrete evidence of improvements in performance that will reflect the return on the firm's Office 2007 training investment. It will also, through increased competency and expertise, improve your firm's competitive position. **ILTA**

Building a Successful Portal: MySite at Nixon Peabody LLP



If you build it, will they come? That was the question Nixon Peabody LLP faced when the firm considered replacing its intranet in 2006. Nixon Peabody needed to update its portal, and Microsoft SharePoint Portal Server 2003 (SPS) was selected as the core technology. The opportunities for collaboration and personalization within the portal were deciding factors, along with a desire to make SharePoint the framework for future application development for the firm.

ARCHITECTING THE PLAN

A steering committee comprising administrators from across the firm helped establish goals for the new portal. The committee determined that the portal (named MySite) needed to offer firm-provided content, as well as give individual users the ability to customize and personalize their own MySite pages. This mix of content had to be achieved in a quick, easy-to-navigate manner. The solution had to be secure, with the ability to provide partners with financial numbers not available to the general population.

Members from the firm's Rochester-based information technology department worked with members of the firm's knowledge services (KS) group to make the committee's ideas a reality. We began with an analysis of SharePoint's capabilities, which showed rich functionality for practice group and administrative sites. However, the Microsoft concept of a "My Site" was found to be lacking the ease of use, security features and

quick navigation that were our primary goals. While SharePoint provides the ability to push out targeted links, the firm needed to provide not only targeted links, but also Web Parts, to end users based on their practice groups and roles within the firm. This content would not be editable, and it had to be secure since financial information and other sensitive data would be involved. The out-of-the-box Web Part addition process was deemed too difficult for a community of end users with varying computer skills, so the development team, working with the KS group, discussed different personalization techniques that would make it easier for end users to add content.

BUILDING FOR SUCCESS

Once the limitations of the Microsoft "My Site" concept were identified, our development team decided to take a cue from the Internet. Many of our users were familiar with personalized, Web-based portals such as iGoogle and My Yahoo, where adding content is as simple as point and click. A custom VB.NET control was developed for our portal. This control recognizes the practice group and role of the user, and pushes firm-provided content to them based on that combination. Next the control adds any personalized content the user has selected for the page. The contents of the user's MySite are logged each time, and a report that shows exactly what is on each user's site is always available. This capability addressed a major weakness with out-of-the-box "My Site" functionality, which lacks the ability

to make the contents of each user's site readily available to administrators for support purposes.

Our end users can add their own content by visiting the "Web Part gallery," a Web Part page that presents available Web Parts in different categories. The gallery can be secured according to practice group and role, such as a partner's category, which is not available, or seen, by nonpartners. The gallery features search functionality that lets users enter keyword(s) and find parts that match those terms.

The Web Part gallery is powered by a series of custom administration pages where authorized users can submit Web Parts, associate them with keywords and categories and then designate whether they should be available to all users or secured to a practice group and role combination. This structure, administered by the knowledge services group, provides a taxonomy for navigating content, something that had been an issue with our earlier portals.

The gallery itself is a mixture of business content and lighter fare. Numerous feeds from BNA and Lexis are offered, along with industry-specific RSS feeds. There are weather parts for each city where Nixon Peabody offices are located, along with sports and world news feeds. Many of the parts utilize technology from Handshake Software, which allows access to line-of-business applications like CMS and Open Text. Users have direct access to their most recently edited documents, and attorneys are presented with their latest financial numbers. This content is accessed through one portal page, rather than through three or four separate applications. RSS feeds from sites within the portal environment give the user access to the "best of" hundreds of sites and provide fresh content on a daily basis. Users appreciate the ability to browse through various subject categories rather than having a long list of available Web Parts presented to them. The gallery search and its use of keywords provide a quick way to find content and supplement the structure that the gallery of categories provides.

Many of the parts available in the gallery are linked to SharePoint sites where the user can find centralized work product. Using Web Parts and functionality from Handshake Software, for example, a user can look up a matter or a client, and then, upon making a selection from the results returned, be taken to "Client/Matter Central." Here Handshake parts present document, timekeeper, calendar and general information related to a specific matter or client in a single page.

DIVERSE TENANTS ABOUND

We've reserved several zones on the user's MySite page as placeholders for firm-produced content. Users cannot



Nixon Peabody's MySite Portal was developed using the following technologies:

- SharePoint Portal Server 2003 with two load-balanced, dedicated WFEs
- A dedicated WSS 2.0 server (140+ sites)
- Custom controls
- Handshake Relationship Software on a dedicated server
- Recommind Enterprise Search

minimize or move parts in these zones. One of these zones is used for a dashboard of the firm's latest financial data, which is secured to firm partners by the custom MySite functionality.

Individual practice groups take advantage of the MySite functionality to push content to their members, while at the same time making those parts available to the full user base in the Web Part gallery. An example is a My Docket part, which is pushed to litigators, and it is also available in the gallery for members of other groups who may have a need for such information.

The design of Nixon Peabody's MySite has yielded a wealth of data that is being used continually to increase adoption of the portal technology. A database that tracks content changes on each user's site allows the KS group to determine which parts are seen as having the most value.

MySite has been a tremendous success. The firm has a centralized environment where news and work product is presented, and end users have an easy-to-navigate, easy-to-personalize site. User adoption continues to increase, resulting in more productive employees. Thanks to careful planning and skillful development, we have found that if you build it right, they will indeed come. **ILTA**

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- Microsoft Technology Vision and Potential for Legal
- Microsoft's Sustainability Story
- Future of Word/Office
- Office 2007 Deployment Tools - Lessons Learned, Best Practices, etc
- Office 2007 - Template Design Using Visual Studio 2008 (Hands-On Lab in ILTA U)
- Office Communications Server, Live Meeting, and Roundtable – It's the next best thing to being there!
- What's New in the Office Collaboration Platform
- Untangling the Office 2007 Ribbon
- Office 2007 - Customize Your Ribbon, Quick Access Toolbar and More (Hands-On Lab in ILTA U)
- From The Trenches - Office 2007 Deployment Lessons
- SharePoint Contest
- Building & Using SharePoint 2007 - Utilizing Shared Document Libraries (Hands-On Lab in ILTA U)
- Building & Using SharePoint 2007 - Building Blogs & Wikis (Hands-On Lab in ILTA U)
- SharePoint for Large Firms Discussion Forum
- SharePoint for Small Firms Discussion Forum
- SharePoint Development Best Practices
- BPOS, Software PLUS Services Overview, Exchange Hosted, SharePoint Hosted, Office Live, Azure
- Business Intelligence/Performance Point
- Putting SQL 2008 On the Table: A Hands-on Look
- Microsoft SQL Reporting Services SQL Tips and Tricks - Tuning and Getting Underneath the Hood

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The Corea Firm's Unified Communications Strategy

by Wes Billingsley, Thompson & Knight LLP

SITUATION

The technology infrastructure at The Corea Firm had started to become outdated, and the firm's attorneys were faced with two separate means of communication: e-mail and a rapidly aging Nortel PBX. So, when it came time for Corea to move its offices, the firm decided to upgrade its communications infrastructure. In the fall of 2008, Corea began exploring possible solutions and was convinced that Microsoft's Office Communications Server 2007 (OCS 2007), in conjunction with Exchange Server 2007 Unified Messaging and Live Meeting 2005, would offer the right solution to integrate its phone, e-mail, and fax systems, while also offering instant messaging, video conferencing and remote access functionality.

SUCCESS STRATEGY

In December 2008, working with a local integrator, The Corea Firm began implementing its new unified communications strategy which included: server and network equipment provided by Dell, along with Microsoft software platforms including OCS 2007 and Exchange Server 2007. The deployment team installed the Microsoft Office Communicator client and Microsoft Outlook 2007 on each of the client systems, as well. Since the system was designed to entirely replace Corea's old PBX and ensure VoIP was fully implemented for all users, a combination of Plantronics headsets and Polycom Phones were used. The phone portion of Corea's new communication system allows users the flexibility to entirely handle calls through their computers or use a hand-set if that would be more convenient.

Corea utilizes cBeyond communications for both its voice and data services and was able to easily convert its existing PRI connection to a SIP trunk, which allowed for additional Internet bandwidth. A challenge with using cBeyond's SIP trunks was that they only support UDP SIP trunking whereas OCS 2007 communicates SIP traffic via TCP. To solve this problem, OCS 2007's mediation server was utilized along with an SIP router to handle the conversion between the TCP and UDP SIP traffic. Fortunately, this backend translation is entirely seamless to the end users, and all of the system functionality is maintained.

Finally, the team deployed Exchange Server 2007 with Unified Messaging, which provides the end users access to their voicemail and e-mail in several different and exciting ways including e-mail transcription.

BENEFITS

Corea's new unified communications system started to show an immediate return on investment. The end users quickly embraced the new features and saw significant productivity gains. With recent restrictions on travel expenditures,

Live Meeting has been invaluable. Corea has also found their new communications system to be extremely intuitive, which has meant minimal training expense or downtime in adapting. Some of the key benefits found in their new unified communications system are as follows:

- **Unifies Voice and E-mail Communications**

A central repository allows everyone to send and receive voicemail, track missed calls, save IM conversations and receive traditional e-mail, reducing the amount of "missed" communication opportunities.

- **Helps Users Get in Touch Faster**

Users can contact one another much faster than they could before. The Office Communicator and Office 2007 presence awareness features, which were initially looked upon with a bit of skepticism, have shown to be quite helpful in determining the best way to communicate with someone by accommodating any particular status.

- **Saves Time and Increases Employees Productivity**

Because the new system speeds communication and provides alternative methods of communication for the firm employees, they now have more time in their workday. With the presence awareness feature, the users have a much better and non-invasive way of knowing who is around and able to help. Also, the click-to-call functionality of Office Communicator has allowed for countless saved hours in looking up someone's contact information and connecting manually.

FUTURE ENHANCEMENTS

With more and more employees utilizing Live Meeting on a regular basis, Corea plans to start implementing video conferencing in the spring/summer of 2009. Since OCS 2007 offers integration with Polycom's video conferencing systems, the firm hopes to leverage its existing conference room video systems as well as bring video conferencing to the desktop via webcams.

To ensure an even greater return on investment, the firm is investigating how a number of client relationship management systems have developed integration with OCS 2007. And the firm hopes to utilize the robust API capabilities of OCS 2007 to further integrate its new communications system with its existing billing and matter management software. Their unified communications strategy continues to prove its worth. **ILTA**



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