

10 Steps to Upgrading Your Network ... Worry Free

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Agenda

- What is the target audience for this presentation?
- What is our Agenda?
- Who is QTS?

Speaker Background

Neil Rosenberg, President and CEO of QTS, is an attorney, and is certified by Novell, Microsoft and 3Com as a technical expert. He has extensive experience with project management, staff management and technology management. His focus is on technical design & implementation management, and strategic use of technology in the legal environment.

The First Five

- Only quality equipment, especially for servers
- Double check on Y2K compliancy for products
- Confirm compatibility between old and new products
- Separate server conversions and workstation changes
- Identify word processing issues and workflow before cutover starts

1. Only quality equipment, especially for servers

- Servers should be designed as such. Don't use clone servers from "second tier" vendors, or Desktop PCs as servers
- Vendors like Compaq, IBM and HP design their servers for reliability and fault tolerance , and their products are tested by Novell and Microsoft
- Major vendors provide better service & support
- Look at this as a long-term investment
- Invest in Fault Tolerance - Backup, Duplexing, UPS, Antivirus, etc.

2. Double check on Y2K compliancy for products

- 3 Issues:
 - BIOS/Firmware Date Processing on Hardware
 - Applications/Operating System Date Handling
 - 2 position Date Format in Data Files - incl. macros
- Check Manufacturer Web Sites for Status
- More components do date processing and handling than you might think - review the whole system
- Remediation is often less expensive than testing/certification

3. Confirm compatibility between old and new products

- Confirm compatibility between:
 - NOS and NLMs/Services (including patches)
 - 3rd Party products (each other and NOS)
 - DOS Apps under Windows
 - Print Servers and NOS/Applications
 - 16/32 Bit Applications
- Look at how long manufacturers are supporting products, and the quality of support they will provide, as well as reseller support abilities

4. Separate server conversions and workstation changes

- If upgrading a server, try to isolate this one change. If you run into problems, it will be easier to troubleshoot. Only change desktop PCs at the same time when you need to for compatibility reasons.
- Try to make server changes transparent to the users - they should come in Monday and everything should look/be the same
- Avoid creating user support issues

5. Identify word processing issues and workflow before cutover starts

- When cutting over Word Processing software, planning needs to incorporate a review of:
 - Existing macros/templates, and the need for new ones
 - Who is printing where, what paper types are needed and what trays they will be in, printer drivers on PCs
 - Bond letterhead versus template-based, and its impact on LAN Faxing, plus scanned signatures
 - Printing envelopes and special paper types
- Goal is for smooth cutover & to prevent these things from impacting your users negatively

The Second Five

- Plan and test document and e-mail conversions in advance
- Temp staff and floor support increase Firm productivity during the cutover
- Trainers must understand law firm operations and be program experts
- Have tape backup & fallback plan for conversion
- Attitude must be positive for users to buy into change

6. Plan and test document and e-mail conversions in advance

- Document Conversion:
 - Word/WordPerfect conversion issues
 - Macros & Templates
- Document Management Conversion
 - Bring over document profiles with all info, avoid changing document numbers (footers, etc.)
- E-Mail Conversion
 - Internet Mail conversion issues
 - Link the systems for transition?

9/27/99 Do you need to bring over mailboxes, etc.?

7. Temp staff and floor support increase Firm productivity during the cutover

- Floor Support
 - Trainer follows trainees to work area, help them apply what they learned and get the work out
 - “Escalation” Support for technical issues
- Temp Staff
 - Backfill while secretaries are in training
 - Help with workload during conversion
 - Document Conversion

8. Trainers must understand law firm operations and be program experts

- Trainers should know legal terminology and the workflow of a law firm
 - Documents that are produced (integrate w/training)
 - Legal features that are used (integrate w/training)
 - Who is who in a law firm, and who does what
- Trainers ideally know firm specific issues
- Trainers **MUST** be program experts:
 - Must know the product thoroughly to be able to answer questions and provide support under pressure

9/27/99 This usually rules out “train the trainer” approaches

9. Have tape backup & fallback plan for conversion

- Across-The-Wire Migrations are Better:
 - Use old server as fallback
 - Clean, new installation
- Ensure tape backups are working - test restore
 - Offsite rotation for disaster recovery
 - Fireproof safe for onsite
- Always back up databases, etc. before conversions
 - Just in case... Never be in a position where you can make things worse, with no fallback!

10. Attitude must be positive for users to buy into change

- This is the biggest issue of them all:
 - Start rollout with best users, best attitudes, ability to work around problems
 - Explain their role and the importance of communication within the Firm
 - Ensure positive, contagious word of mouth
 - Test everything thoroughly before, and during, rollout
 - Have clearly defined process for problem reporting and resolution
- The attitude starts with you and management!

The Bonus Five

- Create a Pilot Team to test the system
- Assign an experienced Project Manager
- Break the project into small pieces, and track and manage each
- Plan user training based on job, skills, enthusiasm and work relationships
- Roll out PCs off a master image

11. Create a Pilot Team to test the system

- Create a Pilot Team of your best users, to:
 - Test the system before it goes into general use, especially printing, macros, conversion
 - Build internal knowledge for support
 - Build positive momentum and attitude within the Firm
- The Pilot Team must actively use and test the system or the exercise is worthless
- Shut down the old system as groups cut over

12. Assign an experienced Project Manager

- Project Manager should:
 - Clearly outline what is and is not being done, setting expectations
 - Clearly define a schedule and deliverables
 - Clearly define the project budget
 - Maintain a punch list of open issues and open activities
 - Track everything against the plan, on an ongoing basis
- If you use vendor/reseller Project Manager, you will need a Project Liaison to handle internal communication, planning & resource management

13. Break the project into small pieces, and track and manage each

- Each component of the project should be a checkpoint:
 - Is everything working as it should be?
 - Were all deliverables/activities completed?
 - Has all required testing been completed?
 - Are we ready for the next phase?
 - Are we on schedule? Within budget?
- Don't move to the next phase without proper testing and closure!

14. Plan user training based on job, skills, enthusiasm and work relationships

- Different Jobs require different training:
 - Secretaries & Word Processing
 - Attorneys
 - Paralegals and Other
- Different people have different skill levels
- Positive attitudes go first!
- Try to keep practice teams together to avoid going back & forth between systems - shut down old!
- One on One for some attorneys and “difficult” users

15. Roll out PCs off a master image

- Saves time and effort
- Consistency for support
- Software distribution reduces long-term support/maintenance
- Network management tools
- Look at long-term “cost of ownership”

Conclusion & Wrap-Up

Who Is QTS?

- Network Integrator specializing in serving NJ/NY Law Firms - Novell Platinum Partner, Microsoft Solution Provider, PC-DOCS Certified
- In business since 1992, based in South Orange
- 22 employees, including 14 technical (3 dedicated to support). Avg technician experience is 6+ years, 6 CNEs on staff.
- Focus on well planned & managed, high quality project delivery, and responsive support

Who are some of QTS' Legal Clients?

- Wilentz Goldman & Spitzer
- Carpenter Bennett & Morrissey
- Porzio Bromberg & Newman
- Brach Eichler Rosenberg Silver Bernstein
Hammer & Gladstone
- Giordano Halleran & Ciesla
- Ravin Sarasohn Cook Baumgarten Fisch & Rosen

Why QTS?

- QTS understands law firms - it's what we do.
- QTS delivers law firm software solutions.
- QTS provides responsive support - CSC staffed with 3 technicians, ManageWise remote management services.
- QTS has focus on quality, reliability, *up-time*.
- QTS has strong technical expertise, depth & product line coverage - Novell Platinum Partner with 6 CNEs.
- QTS is competitive and priced as a high value solution.
- QTS' customer relationships are long-term partnerships.

Questions & Answers

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