8.0 Go! How to Get There (and Why)

Presented by
David Swerdlove
An interactive session about how to prepare for this major upgrade to Aderant Expert and what firms may expect from the new applications and workflow enhancements.

This is an "in the trenches" discussion identifying the goals of your upgrade and how to accomplish them. What is ready for prime time and what is still bleeding edge? What are the major improvements and how will the upgrade fit in with your firm's other software upgrade schedules? Which MOMENTUM sessions this week are essential to attend? How will this upgrade impact the culture of your firm?

David has been performing 8.0 upgrades since HotFix 01, is pleased with the stability of the recently released ServicePack 1 and its certification for most of the new Microsoft platforms (and not so pleased about a couple of omissions).

Attendees are encouraged to join in with their own issues at this roundtable discussion.
8.0: The first version to blend “Classic Framework” with the newer Microsoft .Net Framework technology referred to as “Services Framework” (formerly called Golden Gate)

- Classic Framework is the familiar user interface
- Services Framework refers to both SmartForm applications and all of the workflow that is designed around the Expert Assistant. All the moving parts that tie the system together.

Aderant’s strategy will be to evolve the software over the next few years by

- continuing to support Classic applications,
- releasing new applications in the new SmartForm technology
- tying it all together with customizable workflow
- migrating the Classic applications moving forward

Your firm’s strategy may be to embrace the new technology as soon as possible or to resist “change for the sake of change.” Both are possible.
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- **Why upgrade?**
  + Stay on the support track
    - Are any of your bugs addressed?
  + Reduce risk/increase stability
    - Certification for the latest Microsoft operating systems, database servers and office productivity software
    - More SSRS support (SQL Server Reporting Services)
  + Add basic functionality
    - SP1 new data type for money (EXPCURRENCY is internally defined as DECIMAL(25,10))
    - Drop downs support dual monitors
  + Deploy new applications
  + Deploy workflow
  + Deploy mobile applications (“On the Go”) – including desktop browser
New Applications
- Expert Time Management. (Core) Abandon third-party time entry?
  - Found Time (not core)
- Expert Rates (Core)
  - New ways to define rates in addition to flexible management
- WIP Review (Core)
- Paperless Billing
  - Routing and approval
- Team Manager
  - “QuickLook for workflow”
- Workflow
  - Expert Employee Intake
  - Expert File Opening
  - Expert Matter Planning
  - Expense Management
  - Check Request
  - Custom
New Tools – Aderant Expert continues to be fully customizable. The new customization tools are designed around standard Microsoft technology.

- **Configuration Manager** – stores and maintains system preferences including what’s available on Expert Assistant menu
- **Security Manager** – new workflow security policies for both modules and data
- **Deployment Manager** – creates deployment packages.
  - **Environment Wizard** – creates the environment for deployment
- **Workflow Designer** (Visual Studio add-on) – customize the workflow templates
- **SmartForm Wizard** – new screen painter
- **Domain Customization Wizard** – new data dictionary editor
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- Upgrading incrementally. At this juncture, it is not necessary to implement any of the new technology to be live on version 8.0.
  - Start with Classic Framework
  - Introduce new hardware and software when you are ready

- Identifying the goals of your upgrade.
  - IT-Centric: Upgrade schedule
    - What other systems are slated for refresh?
      - Desktop/images
      - Word Processing/Office Suite
      - Document Management
      - Consistent SQL Platform
  - Management-Centric: reduce bottlenecks, increase productivity
  - Finance-Centric: improved reporting
How to prepare: Nuts and bolts.

+ Hardware.

- Classic Framework Server. This is the existing file server that may either require upgrading or replacing. Minimum requirements include:
  - Windows Server 2008
  - ASP.net
  - .Net Framework Version 4.0
  - 4 core Xeon CPU processor
  - 8 GB RAM memory
How to prepare: Nuts and bolts.

Hardware.

Database Server. You might be able to utilize your existing database server when going into production but SQL Server does need to be upgraded to SQL 2008 R2 or 2012. Two new databases for AppFabric will also reside on this box.

- 64-bit quad core Xeon CPU
- 8 GB RAM
- SQL Server 2008 R2 or 2012
- SQL Server Reporting Services (optional)
- PowerShell (this installs itself on Server 2008)
- Gigabit Ethernet Network Interface
How to prepare: Nuts and bolts.

Hardware.

Application Server. A new concept for Aderant. Processes the workflow and needs to be scalable if large numbers of users are relying on it. The design allows for multiple load balanced servers should performance lag. Initially, there won’t be significant traffic to this machine, but as the firm ramps up workflow transactions, this box has the most potential for bottlenecks.

- Windows Server 2008 R2 SP1
- IIS 7.0 or 7.5
- .Net Framework 4.0+
- 64-bit quad core Xeon CPU
- 8 GB RAM
- Gigabit Ethernet NIC (2 if part of a load balanced “farm”)
- Windows Server AppFabric
How to prepare: Nuts and bolts.

Hardware.

Administration Workstation. Does not need to be a server class machine as it is used independently to create “deployment packages” for workflow.

- Windows 7 Pro SP1 or Server 2008/R2 SP1
- .Net Framework 4.0
- 2 GHz core 2 duo CPU
- 4 GB RAM
- Visual Studio 2010/2012 Professional – Required to compile code in the Deployment Manager for custom columns and tables in data models for the entity framework
- Visual Studio 2010/2012 SDK
- Visual Studio 2010/2012 Visualization Modeling SDK
- Windows Server AppFabric Admin Tools
- Microsoft Community Build Task
How to prepare: Nuts and bolts.

Hardware.

Customization Workstation. Most firms that do not have dedicated development personnel designate the Administration Workstation as a dual purpose Admin/Customization machine. Must have local SQL Server.

Client Machines. Little has changed. The specs are:

- Windows XP/Vista/7
- 3 GHz Pentium 4 CPU
- 4 GB RAM (or 3GB allocated for Citrix session)
- Microsoft Message Queue no longer required as of SP1

On the Go mobile devices

- iOS 5
- Android 3.x

Windows Server 2012 is not supported due to significant changes in Active Directory. Aderant hopes to be certified for server 2012 by the next SP.
Architecture

The workflow is handled by the AppFabric database. (ExpertWorkflow and ExpertMonitoring)

A set of extensions to the Windows Application Server that “make it easier to build, scale and manage Web and composite applications that run on Internet Information Services (IIS).” AppFabric enhances the Application Server role in Windows by providing some features out of the box that customers previously have had to build by themselves. These include a scalable distributed cache and features for managing WCF and WF services.

- Windows Communication Foundation (WCF)
- Windows Workflow Foundation (WF) – Provides the workflow
- Windows Presentation Foundation (WPF) – Provides the forms (screens) which are based on a version of XML called Extensible Application Markup Language (XAML)
**Architecture**

- SmartForms are XAML documents that are edited with the SmartForm Wizard and are rendered by IIS. Each workflow is a website on the IIS. The IIS Services Manager is where you go to manage AppFabric.
- Two kinds of SmartForms: workflow SmartForms are scripted with Iron Python; standalone SmartForms are scripted with C#
  - The more mature the product gets, the less scripting that will be required
  - 80/15/5
- New layer between database and front end: The Domain Model (Customizable with Domain Wizard)
- ClickOnce depreciated. No certificates necessary. Deploy with .MSIs (Removing a Click-Once Installation.docx)
Licensing

- **Workflow Templates:**
  - You can edit the SmartForms that come with the various workflow templates.
  - However to create new SmartForms, you need the Advanced Workflow license. Without it, you can only edit existing forms.
- On the Go license to render forms as HTML 5
- File Opening requires licensing of the API as well as Browser Conflicts
Gotchas

- You can expose all custom columns to SmartForms with the exception of custom CMS comments. Instead, start using VarChar(MAX)
- Moving/rename databases: pre-80SP1, this required extensive reconfiguration because the AppFabric database linkages
  - Expert Database Environment Synchronization utility - EnvironmentCloner.exe which is located in the ExpertShare.
- AppFabric - if it fails, uninstall and then reinstall from C:\Temp\ApplicationServerPrerequisites\Installers
- Run deployment as service account and make service account a local admin that can log on as a service
  - Service.expert
  - Service.appfabric
- .NET Framework 4.0 or better required on App server and IIS must have ASP.net 4.0 "allowed" in ISAPI and CGI Restrictions screen
Tips

- Always check ZIP files for blocked content
**Tips**

- **PowerShell**: TAB is your friend. Installation requires running PS.
- **Location of ExpertShare**: even though the documentation recommends putting it on the administration machine, if you have chosen Windows 7 for its operating system, this is a bad choice.
- There is a large library of SmartForms to “repurpose” (aka plagiarize) and the library is growing quickly.
- **SmartForm Regeneration Wizard**: There is a process similar to “merge form” for SmartForms, but this does not reconcile your custom changes to the Aderant version. Instead, it replaces controls with the latest version.
- **Virtual Machines**: Aderant has come a long way in accepting that the firms are going this route, especially for the Application Server and Admin Server.
How to prepare: Workflow.

- SmartForm Application Users Guide
- Security.
  - Classic security remains the same. Is yours configured correctly? Now is the time to clean it up.
  - Proxies (in Expert Assistant)
  - Services Framework Administration Guide
- Starting small – start with a non-essential task
- Analysis of business process: flowchart it in detail
- 3 Environments: Development, Test and Live
How to prepare: Culture.

- Introduce Expert Assistant for non-critical items in advance of mission-critical purposes.
  - Create a simple workflow like vacation time request
  - Get acclimated to features such as dynamic lookups (search fields), initiating workflows, accepting/sharing/reassigning/completing tasks and “notes.”
- Launch AppShell
- Launch other Aderant and non-Aderant apps
- Notification independent of emails. Despamification of the office.

- Getting partners on board and identifying who will lead process management
Essential sessions this week:

**Monday**

- 9:00 – 10:00 – Salon 1 – What’s New at Aderant. Emmanuel Kyrinis
- 10:30 – 11:30 –
  - IT-Centric – Poinciana 2 – Upgrading to 8.0. Tim Garner
  - Finance-Centric – Cowrie 1 – Expert Time Management. Elan Emerson and Michael Whelan
  - Workflow Dev – Poinciana 1 – Latest Tech in SP1. William Davis
- 1:00 – 2:00 –
  - IT & Finance-Centric – Cowrie 1 – Expert Time Management Implementation. Marie Burgess
2:30 – 3:30 –

★ IT-Centric – Salon 1 – Mobility: What’s next. Emmanuel Kyrinis and Mary Burgess
★ Finance-Centric – Cowrie 1 – Expert Time Management: setup, configuration and customization. Meg Anker
★ Workflow Dev – Salon 2 – Intro to Expert Check Request Workflow. Kathleen Grant and Mary Clemmons

4:00 – 5:00 –

★ IT-Centric – Virtualizing Expert Systems. Tim Garner
★ How to be On The Go. William Davis
Essential sessions this week:

Tuesday

9:00 – 10:00
- Workflow Dev – Cowrie1 – Expert Workflow Overview. Ryan Moffit

10:30 – 11:30
- IT-Centric – Poinciana 2 – Global Deployment Options for Expert Time. Tjeerd Mulder
- Workflow Dev – Salon1 – Intro to Matter Planning. Dave Maher

1:00 – 2:00
- IT & Finance-Centric – Cowrie 1 – Workflow Admin. William Davis
2:30 – 3:30 –
- Cowrie 1 – Implementing File Workflow. Chris Mills

4:00 – 5:00 –
- IT-Centric – Poinciana 2 – Expert Deployment and Multiserver scaleout. Tim Garner
- Finance – Salon 1 Expert Rates. Rtan Boyce and Matt Bucks
- Workflow Dev – Cowrie 1 – 5 most common Customizations in Workflow. Ryan Moffit
Wednesday

- 9:00 – 10:00 – Poinciana 1 - Query Service – How to retrieve data easily. Chris Mills
- 10:30 – 11:30 – Cowrie 1 – Roundtable: Customization and installation. Emmanuel Kyrinis and William Davis
Thank you!

- Take bow
- Run out side door quickly...