

2017 AEUC Roundtable

8.1 Upgrade Lite: Lo Fat/Gluten Free!

Presented by David Swordlove

Join David Swordlove in a Roundtable discussing ways to get through an upgrade with the fewest calories, greatest benefits, least amount of disruption.

Many smaller firms are generally happy with their Aderant practice management suite, have waited on the sidelines and are reluctant to invest a lot of time or money on an upgrade they don't particularly want to tackle. Everything works. But, their version is (or soon will be) no longer supported. IT needs to upgrade desktops to an uncertified version of Windows or Word/WordPerfect. What's in it for me, how do I get in and out unscathed and how do I get my boss to approve it?

- Doing 8.1 Lite right requires the perfect balance of timing in combination with other infrastructure initiatives being planned, identifying the major/minor/incremental patches to include and targeting what needs to be accomplished.
- This may include investigating specific the issues addressed:
 - Are my bugs fixed in this release?
 - What new features do we need now vs. what looks interesting for the future?
 - How do we address integration with internal systems and seamless migration of current reports and customizations?
 - After the upgrade goes live, what's next?

- 1) Versions. Jumping a major Aderant version or 2 or 3 or 4 or 5...
 - a. SQL Server versions.
 - b. Server OS versions
 - c. How far to go?
 - d. Timing with other firm initiatives
 - i. MS Office version
 - ii. Desktop OS refresh
 - iii. Server OS
 - iv. SQL Server
 - v. 3rd party integration
- 2) Collateral damage.
 - a. The jump to SQL 2005 and ANSI 92 standard from ANSI 89
 - i. Joins in FROM clause
 - ii. *= vs LEFT OUTER
 - iii. COMPUTE
 - b. Reports
 - c. QuickLook inquiries
 - d. Generic Importer
 - e. Menus
 - f. Forms
 - g. Security
 - h. Logins (CMSADM alias vs DBR_CMSADM role) and Logmaint

- 3) New stuff
 - a. Classic
 - i. Features
 - 1. eBilling Center
 - a. LEDES
 - b. Rules
 - 2. Rate Sets
 - 3. Split Billing
 - 4. Trust (Investment accounts)
 - b. Framework
 - i. Apps
 - 1. New
 - a. Expert Case Management
 - b. Expert Entity Manager
 - c. Expert MatterWorks
 - d. Expert WIP Aware
 - 2. Ported
 - a. Expert Rates
 - b. Expert Time
 - c. Expert Collections
 - d. Expert Expenses
 - e. Expert Billing
 - f. DocuDraft 2.0
 - ii. Workflow
 - c. SSRS
- 4) Roll out
 - a. Required in-house resources
 - b. Hardware requirements and virtualization
 - c. Day 1
 - d. Pilot groups