

# 2011 CIO ROUNDTABLE RETREAT

## Architecting Our Future

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*eSentio*  
Technologies



# Office 2010/Windows 7 Deployment Best Practices

*Presented by Michael Georgopoulos*



# Agenda

- Industry statistics
- 3rd party application compatibility
- Known migration issues
- Training challenges
- Deployment best practices
- Case study



# Office 2010 – Who is upgrading?

- Industry statistics (courtesy of Traveling Coaches)
  - 26 active Office 2010 projects
  - 7 active Office 2007
  - 40 Office 2010 upgrades by end of year
- Most are part of a desktop refresh
  - Windows 7
  - Some form of DMS update



# Office 2010 – 3rd Party Integrations

- 3rd party application compatibility
  - All major product vendors support Office 2010 32-bit
  - 64 bit support lacking
- 3rd party tools
  - Most upgrading existing products or switching to alternative
  - No one is using native tools for PDF and metadata removal due to lack of functionality
  - Some are looking at server based solutions for these tools to simplify desktop
  - Some are trying native comparison



# Office 2010 – Migration Issues

- XML file format
  - When coming from Office 2003 must deal with conversion issues/cleanup
- Some integrations still have bugs
  - iManage integration does not allow printing page ranges
  - DeskSite does not fully support new version recovery
- Enabling features without training
  - Conversation view in Outlook – turning it on without training can make people think email has been deleted
- Some older IP phones can't take advantage of social networking integration



# Office 2010 - Training

- Training challenges
  - Significant interface changes
  - More lawyers editing own documents, must target training
- Continued pressure to minimize classroom time
- Even support staff is stretched out
- Average is 2-3 hrs. per atty., ½ - 1 day per staff
- Expanding communications in advance of rollout to promote top benefits, e-learning on concepts to prep before training
- Personal coaching for attorneys
  - Meeting early to ask them to identify key topics
  - Private sessions after rollout on top 3 items



# Office 2010 – Best Practices

- Evaluate built in tools (PDF, document compare, metadata)
- Re-evaluate templates/macros
  - Many firms deploying numbering, but going with homegrown templates
  - Leverage building blocks
- Take advantage of Office use at home programs
- Do not upgrade just to get to new file format
  - High cost but not taking advantage of new tools/business process



# Windows 7 – Best Practices

- Application compatibility – major apps work fine
  - Must still test all applications for compatibility
- Must use IE 8/7
  - Older sites may not work and require redevelopment
- 64-bit OS recommended
  - No support for legacy 16-bit apps
- Significant interface changes from XP
  - Requires training, particularly for mobile users
- SP1 released
  - No significant new features; most fixes already released through windows update



# Office 2010 – Case Study

- A&B Office 2010 upgrade project



# Discussion

