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Windows XP / Office 2003

## Step 1: Goal and Timeline

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### Goal

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- Address issues from older version - *Office 2007 represents a redesign of the platform, paving the way for XML format.*
- Interface is designed to improve productivity – *The “fluent user interface” allows users to quickly locate commands, tools and options.*
- Application specific enhancements improve efficiency – *Word 2007 has a more logical “workflow” design. Excel 2007 has the capacity of 1 million rows and 16,000 columns.*
- New features make it easier to produce professional-looking documents - *Quick Styles, Building Blocks and SmartArt.*
- New file formats has advantages - *The XML-based file formats has “compressed” file size, less chance of corruption and better security.*

### Timeline - Project Calendar

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- Target date and back out.
- 12 months design - if you have 3rd party apps.
- 6 months marketing and communication efforts (e.g. demonstrations).
- 4 months elearning (e.g. MS website tutorials, training path).
- 1 ½ to 2 yrs deployment - based on firm growth (e.g. mergers, office moves).

## Step 2: Identify What Your Are Dealing With

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### Third Party Tools

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- Spreadsheet listing every 3rd party tool that touches Office 2007.
- List in priority of importance to firm (e.g. DMS, Time Entry, CRM) v. image (e.g. DMS, CRM, PDF Converter) – *these will be different.*
- Evaluate the validity of keeping.

## Customizations

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- › Spreadsheet listing firm customized toolbar, macro, autotext, etc.
- › List priority of importance to firm v. image – *these will be different*.
- › Evaluate the validity of keeping.

## Templates and Forms

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- › Spreadsheet listing firm templates and forms (e.g. new client matter).
- › List in priority of importance to firm v. computer image – *these will be different*.
- › Evaluate the validity of keeping.

## Identify the Critical Functions of Each Office 2007 Application.

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- › For example, in Word it might be: Save/Open v. Save As/Open As; PDF Converter, Headers, Footers and Page Numbering; TOC and TOA; etc.

## Step 3: Research and Design

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### Communication

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- › Begin information sessions, surveys and one on one feedback..
- › Provide documentation (e.g. file extension changes).
- › Dedicate internal website (e.g. videos, documentation, links, information).

### Identify Team Members

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- › Consultant - decide whether or not to hire outside consultant.
- › IS and HR Team - involve everyone.
- › Focus Groups – Office 2003 and 2007.

### Compatibility Issues

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- › Compatibility Mode v. Compatibility Pack Behavior.
- › Decide when to push out to users.
- › Communicate the “gotchas”.

### DMS Determination

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- › Are you going to force the file types into the same application name? or
- › Are you going to have both application types?

### Customization and Settings

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- › Decide what should stay and what goes.

- Ask yourself is it really important? Will this help or hinder?
- Does this allow the user to work on their home PC or does it cripple them?

## Step 4: Build and Test

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### Communication

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- Continue information sessions, surveys and one on one feedback.
- Terminal Server for Office 2007 with some 3<sup>rd</sup> party apps. added. This will be our image when finished.
- 20 inch monitor size – take advantage of the ribbon.

### Customization - Workflow Ribbon Design

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- Customized features should be placed in areas where users will use them (e.g. doc id should be found on the insert ribbon).
- Remaining customized features housed at the end of ribbon.
- Tools used to customize - XML and Visual Studio.

### Customization - Quick Access Toolbar

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- Show below ribbon to take advantage of larger monitor space
- What would an attorney need to get a document out the door if working late at night?

### Customization - Office Button

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- Add - Neevia PDF Converter, Printer Tray.
- Remove – Publish, some items from Save As.

### Templates

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- Rebuild templates using building blocks v. converting.
- Move some templates to web forms.

### Settings:

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- Enable Live Preview – need more PC power.
- Keep track of formatting - if turned off Style Inspector will not work.

### Image Issues

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- This is the time to clean up your image.
- Test different methods of deployment (e.g. SMS, MOM).

- In place upgrade v. reimage – We tried and found that there was always something left behind.
- MSI v. OCT tools - understand what is handled by the MSI vs. the OCT.

## Step 5: Beta and Pilot

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### Communication

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- Where we are?
- Continued information sessions.
- Terminal Server for Office 2007 updates with some 3<sup>rd</sup> party apps. added. This will be our image when finished.

### Redesign

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- This is the time to revisit items, make changes, tweak.

## Step 6: Deployment

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### Communication

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- Projected installation dates.
- Terminal Server for Office 2007 complete.

### Training Times:

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- Teach based on processes (e.g. communication, research, editing, collaboration).
- Attorneys to get 3 hours.
- Secretaries to get 6 hours.
- Others somewhere in between.

### Support

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- Additional resources available – MS Website training tutorials, floor support.