

PCLaw v10 Upgrade Checklist and FAQs

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Why should you upgrade to PCLaw Version 10?

PCLaw is not as complex of a program as you may sometimes think. In reality, the data consists of a Data Folder and C-tree Database or a Data Folder and a SQL Database if you have the enterprise version. This structure makes it very easy to upgrade and it is not a time consuming process when you follow the guidelines below. When you upgrade PCLaw, you are doing an “in place” upgrade. That means that you are overwriting your existing program files. Budget 30 minutes on the server and 5 minutes on each workstation. Remember, these are estimates and can vary depending on your particular infrastructure. From my experience, it is unlikely that you will have problems when you upgrade, although it does not mean that you shouldn't be prepared for some. This is your firm's financial data and the program that allows you to bill money, so it is natural to feel some trepidation when upgrading the product.

- **Technology** Microsoft has been upgrading Windows and the newer version of PCLaw runs better on Vista and Windows 7. When you replace a workstation in your office, you are most likely going to be getting Windows 7. Those earlier versions of PCLaw were created before Vista or Windows 7 were available, so they are not 100% compatible with PCLaw. Therefore expect your new machines to have problems if you are on an older version of PCLaw.
- **New Time Saving and Productive Features** Click on the link to read about the new features included in version 10 <http://www.lexisnexis.com/law-firms/practice-management/specialized-law/pclaw.aspx?content=enhancements>
- **Bug Fixes** Bug fixes occur in current code. Bug fixes and compliancy to the latest technology will not occur in older versions of the software like versions 7, 8 or 9.
- **Support** If you use a consultant or you use Tech Support, they are going to be better supporting a newer version than an older version. Some of the issues you may be experiencing in an older version have been fixed in the latest release.

Tips to Ensure a Smooth PCLaw Upgrade

- **Upgrade after your billing cycle.** Regardless if you bill weekly, monthly, or quarterly, do not upgrade PCLaw before you need to do bills. That way you are not under pressure to create bills and upgrade the software at the same time.
- **Run the upgrade on the Main Server Machine.** This needs to be done before upgrading any workstations. Running the upgrade from the server can

minimize the time it takes to install the upgrade and decrease potential network connection issues.

- ***Make sure no one is in PCLaw.*** Tools → User Monitor is a great PCLaw feature that lets you know if anyone is in the system. Tools → User Message is a great to send a message through PCLaw to let users know they must exist.
- ***Run a Verify Data Integrity*** before you upgrade. This checks your PCLaw database for any problems and fixes them. Again, all users must be logged out to do this.
- ***Make a Backup.*** Make sure you have done a backup before you upgrade. PCLaw makes this extremely easy to do. Run a backup and if the upgrade is a total failure, like the power fails in the middle and the program becomes corrupt, you can easily restore your previous version. To wipe the updated version, and download and reinstall your old version will take about 30 minutes. Lexis keeps all of the older versions of PCLaw on their website for download.
- ***Schedule the Upgrade for the right time of day.*** My recommendation is to schedule it towards the end of the day, like at 3-4pm, but not too late, that way if there are any issues, you can resolve them with PCLaw tech support and have the program up and running with minimal downtime.

Test Environment

If you are really concerned about the upgrade, you always have the option of running the upgrade in the test environment. You can always copy your set of books to a standalone computer and test the upgrade. This ensures that your firm can still work and you can easily make sure that upgrade went well. If you want to do this, it is advised to engage with a PCLaw Certified Independent Consultant who has experience with test environments or have your IT person work with a PCLaw Certified Independent Consultant to ensure the test environment is properly set up and doesn't interfere with your live environment or data.

What Else Should I do after the Upgrade is Complete?

- ***User Workstations*** - Log into each workstation to ensure your users can access PCLaw

- **External Links** - Check all of the external links from PCLaw, i.e. Outlook, Excel, Adobe Acrobat
- **Verify Reports** - There are 9 reports that you should run before and after the upgrade to make sure everything is on the up and up. A General Bank and Trust Bank Journal will let you know that nothing changed with your main bank and client trust accounts. Run the Client Summary, Client Ledger (with Totals only checked) & Billing Fees Journals to compare A/R before and after the upgrade. And finally, run all four GL statements verifying everything upgraded accurately on the accounting side.
- **What's New** - Read and distribute the "[What's New](#)" guide on the LexisNexis support center

Still Worried?

- Use a CIC: If you don't have a CIC in your area, most of us can work and support you remotely. If you already have a CIC, they likely also offer this service. Our company Law Office Technology offers remote installation, implementation and training. We can also do this late at night and on weekend so you can keep working.

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