



UPGRADING TEAMCONNECT

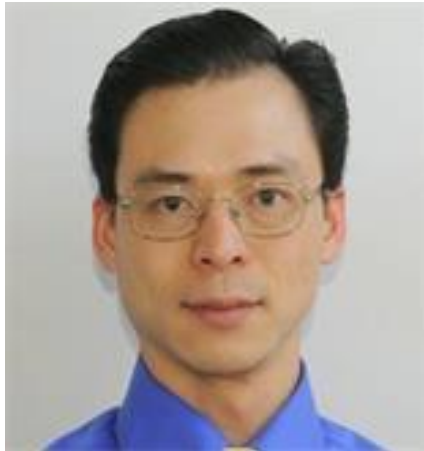
THE VALUE AND BENEFITS

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MEET YOUR PRESENTERS



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Benefits of Upgrading TeamConnect



TeamConnect Changes



Upgrade Analysis



Best Practices for Upgrade Project Planning



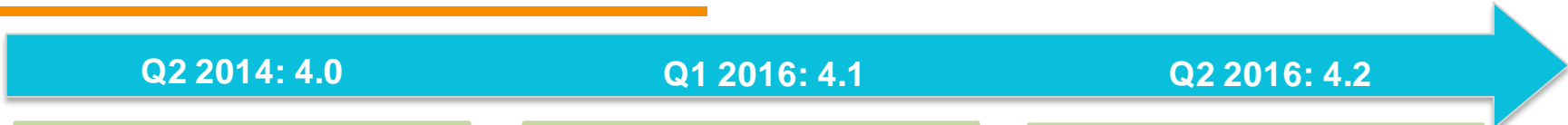
Upgrades Included Program

BENEFITS OF UPGRADING TEAMCONNECT

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- **Business reasons for TeamConnect Upgrade:**
 - New Features (e.g. Mass Update)
 - New Modules (e.g. Elastic Search)
 - Enhanced Design (e.g. Invoice Workflows)
 - Updated Technology (e.g. New UI/UX)
 - Defect fixes (e.g. Incremental Updates)
 - **To reduce customization and adopt OOTB functionality**
 - An opportunity to update design and reinvent the business processes
- **Value added in Upgrade:**
 - Available Incremental TeamConnect Updates
 - Improved Upgradability
 - Improved Supportability to Resolve Issues Quicker
 - Stay current with technology
 - New functionalities Including:
 - Screen Designer Tool (4.0+)
 - Configuration Transfer Utility for migrating design changes (4.0.9)
 - **Upgrade Included Program (4.0+)**

TEAMCONNECT 4.X RELEASES



Q2 2014: 4.0

Q1 2016: 4.1

Q2 2016: 4.2

TCE 4.0

- Workflow Enhancements
- Search and Mass Update
- Enhanced API Layer

Legal 4.0

- Financial Management with complete budget flexibility
- Matter Management

Screen Designer

- Ability to preview and publish fields and screens from a simple GUI without custom coding

Upgrade Toolkit

- Tools to facilitate upgrade to TeamConnect Legal 4.0 and future versions

Global Search

- Re-architected for large scale, high-performance
- Search across all records and docs including doc content
- Quick filters and drill down, configurable results display

Tendering

- Request bids from Vendors
- Review, reject, or approve from within TC
- Works with Collaborati or vendors outside system

Workflow Enhancements

- External condition checks
- Forward to further stops
- Workflow steps self-reassignable by users
- Restart at specific stops

Field Level Security

- More granular control over users' access to data fields
- Automatic enforcement of field level rights, simplifying the centralization of security management
- Redesigned Group Category rights screen: grid layout, much faster, simpler administration
- New Global Search admin setting prevents searching linked records

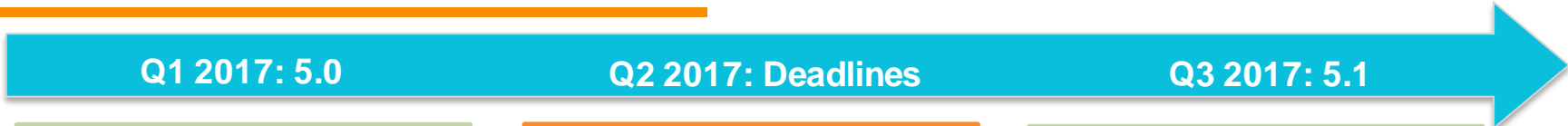
Legend:

Platform

Products/Modules

Tools

TEAMCONNECT 5.X RELEASES



Q1 2017: 5.0

Q2 2017: Deadlines

Q3 2017: 5.1

TCE 5.0

- Complete UI overhaul for a better overall experience
- Highly requested UX enhancements including new options and settings to personalize each user's TeamConnect experience
- Easy custom theme creation for more personalization, branding, accessibility
- Document drag-and-drop directly in TC interface
- Mobile optimizations targeted at tablet users

Deadlines 1.1 (TCE 3.3SP3+)

- Mass updating Deadlines changes more efficient in UI
- Module now installs/upgrades like other TC modules

Deadlines 2.0 (TCE 3.4SP1+)

- *All 1.1 enhancements*
- Prefix for Deadlines tasks and appointments is configurable
- Primary assignee is the default user selection when adding tasks or appointments
- New fields: Category Code and Category Name

Deadlines 5.0 (TCE 5.0+)

- *All 2.0 enhancements*
- Updated settings page to match TC 5 UI and better adhere to 508 compliance

TCE 5.1

- Technology stack update including Java 8 binaries, elasticsearch 5.3, core library upgrades
- **New:** Customizable task and appointment reminders for future due dates

Screen Designer

- Update to create and modify new notification templates

Legend:

Platform

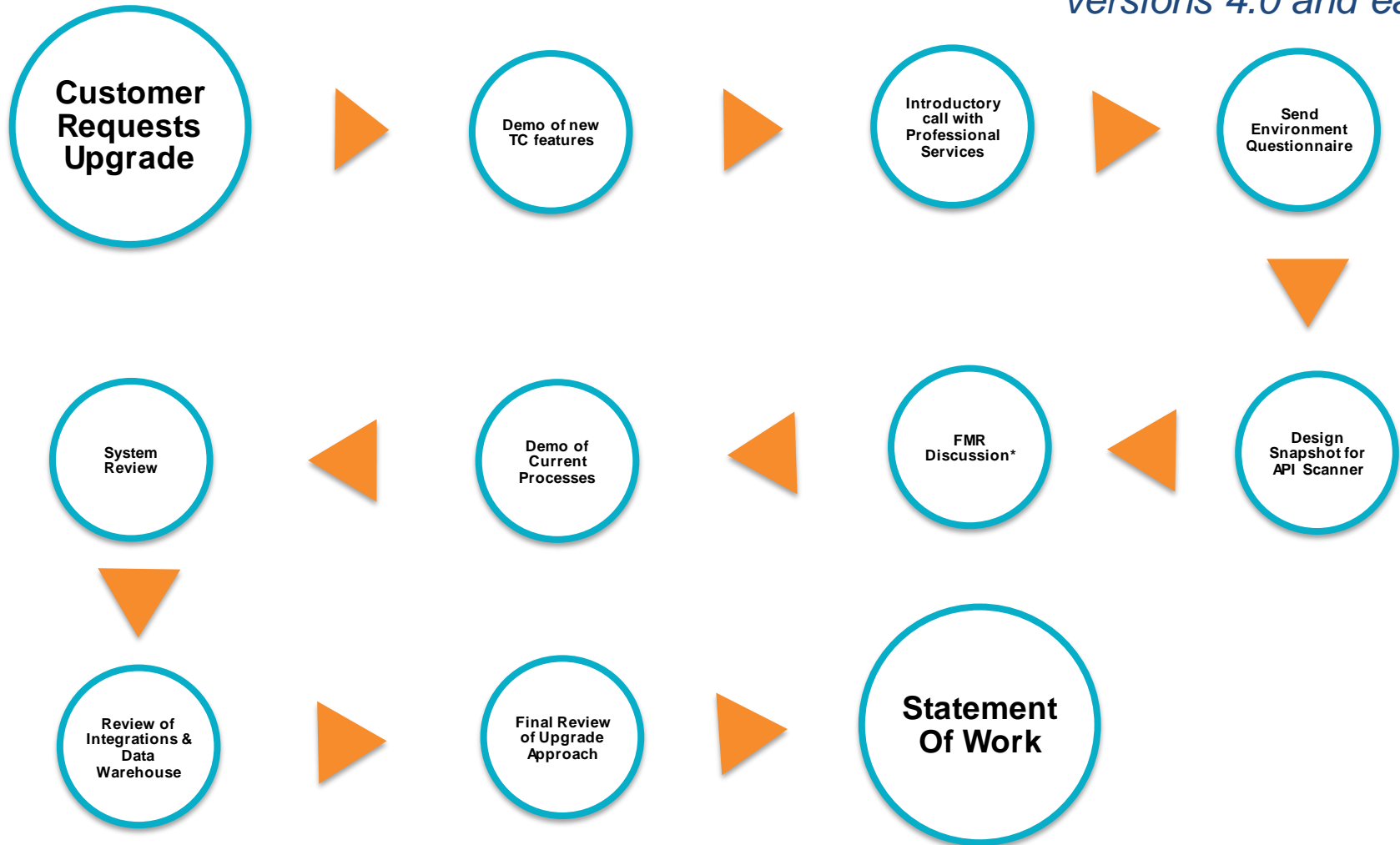
Products/Modules

Tools

UPGRADE ANALYSIS

TEAMCONNECT 5 UPGRADE ENGAGEMENT PROCESS

**versions 4.0 and earlier*



TEAMCONNECT UPGRADE ANALYSIS

- **TeamConnect Upgrade Environment Questionnaire Form:** Helps to understand current version of TC and other modules, integrations and environment setup.
- **API Analysis** - Review Custom Code for API Compliance.
- Understand current customizations and **pain points**.
- Find opportunity and make recommendations to improve business processes and improve custom design.
- Discuss if New Financial Management module (FMR) is good fit for your business.
- Determine correct Upgrade Path and recommend which modules (e.g. CSM,TCL) to upgrade along with TeamConnect Enterprise.
- **Identify any impact on Reporting.**
- Determine effort and budget for Upgrade project.
- Helps in Resource Planning and Scheduling in Upgrade project.
- Helps to check compatibility with third party Tools and Software e.g. Browser version supported.
- Evaluate if custom functionality still meets business needs? Is it better to re-implement vs Upgrade?

INFRASTRUCTURE CHECK

- **On-Premise Clients:**
 - Planning your **infrastructure updates** to support newer version of TeamConnect.
 - Plan on external access needs for the Services team
- **TeamConnect Upgrade Environment Questionnaire Form:**

TeamConnect 5 Upgrade Environment Questionnaire

Purpose:

This template will help Mitratesch to assess the steps required to upgrade TeamConnect from current version to TeamConnect 5 version.

Client Name: _____

Please fill out relevant information for assessment of TeamConnect 5 upgrade project:-

- 1. Client TeamConnect Production environment version:**
 - a. TeamConnect Enterprise version: _____
 - b. TeamConnect Collaborati Spend Management version: _____
 - c. TeamConnect Legal Matter Management version: _____
 - d. TeamConnect Financial Matter Management version: _____
 - e. TeamConnect Office Suite Integration: _____
 - f. TeamConnect AP Link: _____
 - g. TeamConnect Deadlines: _____
 - h. TeamConnect Data Warehouse version: _____
 - i. Business Object version: _____
- 2. TeamConnect environment details:**
 - a. Is TeamConnect hosted at Mitratesch or inside client's network? _____
 - b. TeamConnect Database type and version: Oracle or MS SQL Server? Version? _____
 - c. TeamConnect Application Server version: Weblogic or WebSphere etc. version? _____
 - d. Java Version on TeamConnect Application server: _____

BEST PRACTICES FOR --- UPGRADE PROJECT PLANNING

BEST PRACTICES FOR UPGRADE PROJECT PLANNING

- Recommend preliminary **Upgrade analysis**
- **Know Your TeamConnect**: It is really important to have somebody (SME) on the project who knows your TC design
- Take the opportunity to revise business processes:
 - Identify if a recent reorganization may have changed business needs
 - Review your short- and long-term goals for TeamConnect
- Revise customizations – reconsider which customizations or configuration are not needed. e.g. Use of Email notification templates instead of Custom Rules for email notification
- **Think outside the box**
- Refresh all non-prod TC environments with Production copy to match design and data for upgrade testing. (Data can be scrubbed if needed by your policies.)

BEST PRACTICES FOR UPGRADE PROJECT PLANNING

- Use [API Analysis Tool](#) to understand and resolve **non-compliant code** in your TC customizations for better [Upgradability](#) and to take advantage of [Upgrades Included Program](#)
- QA is very important. Allocate sufficient resources & time for QA Testing, including Regression Testing.
- System Integration Testing: Test Custom Integrations with setup and data which mimics Production environment.
- [User Acceptance Testing](#):
 - Create unique Test Cases for UAT users
 - Assign to TeamConnect power users
 - Use Production copy for UAT. Test with real data
 - Do ad-hoc testing
- Smoke Test BO/Native Reports
- Build the [Runbook](#) with timings to understand impact on Roll-out in Production (e.g. when Data Warehouse refresh will complete and Reports will be available after Go-Live)

CHANGE MANAGEMENT

- Check if your users need **Training or Job-aids** for newer version of TeamConnect
- Distribute job-aids to your TC users before Production Roll-out
- Setup a **Mailbox** for any questions regarding new TC version. All normal users will send their questions to this mailbox
- Setup a War-room or dial-in for post-Go-live to address Production issues
- Assign **Champions** to each legal user group

UPGRADES INCLUDED PROGRAM (TC 4.0+)

UPGRADES INCLUDED PROGRAM: INCLUDED SERVICES (TC 4.0+)

Code Review

- Qualitative and script-based testing to assess effort and verify that policies and best practices have been followed

Upgrade of Non-Production Environment

- Team will run upgrade scripts for products covered by the program

Testing

- Smoke testing – series of key use cases focused on functionality of existing core features and new features to verify upgrade quality

Training

- Review configuration of new features and functionality with system administrator, and training on new functionality

Upgrade of Production Environment

- Following successful testing, our team will support the upgrade of your production environment.

*Please note: for **on-premise customers** our team will help support your IT team through the upgrade of the non-production and production servers.*

WHAT'S NOT INCLUDED (IN UPGRADES INCLUDED)

- Any custom design (additional or rework) such as:
 - Customize a new OOTB functionality
 - Update older screens to use new style sheets in 5.0
- Configuring New Features
 - Upgrades Included does provide training for administrators on new features but does not include significant work/time configuring new features. *For example, in 4.2, field level security is available. During training of the administrator, we would walk them through a few examples but should your site want Mitratech to actually do the configuration, that would be billable.*
- Additional environments
 - Beyond the initial test/development upgrade and the production environment, other environments such as a UAT or QA environment are not included in Upgrades Included.
- Moving Data from Custom to OOTB
 - *Example: if the customer uses custom cost centers and now want to move to OOTB cost centers.*
- Additional Testing or Training
 - Upgrades Included provides basic smoke testing and administrator training on new features, any additional training, end user training, or complete design/system testing would be billable.

TEAMCONNECT CUSTOMERS BY VERSION

of Customers at each version

- TeamConnect 5 : 8 customers in flight
 - None currently in Production
 - 5 in Implementation
 - 2 are in UAT
 - 3 Upgrades from TC 4 are in Progress
 - 1 in UAT
- TeamConnect 4.x : 57 customers
 - About half are new implementations and the other half are upgrades from an earlier TeamConnect Version
- TeamConnect 3.x : 81 customers
- TeamConnect 2.5 or CLMS : 8 customers

QUESTIONS



THANK YOU

**PLEASE TAKE 5 MINUTES TO COMPLETE THE
SESSION FEEDBACK FORM VIA THE MOBILE APP!**

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