Technology in the Practice Committee
June 14, 2021
2021 Virtual Summer Meeting

LANDING IN THE CLOUD

Scope. This presentation follows the previous two (1) the Fall 2020 committee meeting – "NUTS AND BOLTS - Where Should Your Server Sleep at Night?" and (2) the March 2021 committee meeting "Moving Your Firm Server To The Cloud**"** This presentation will cover the onboarding or migration process. The comments are more relevant for a smaller firm that has most firm employees signing onto the physical server over a local area network. Members of larger firms that already have every user signing on by remote desktop connection or VPN connection to a physical server will not notice the changes much, if any. Mainly the members of the firm dealing with IT matters will be aware of the onboarding process.

Process. After the contract is signed, moving is about an 8-week process. See attached list of steps. The process is similar in some ways to moving your law firm from one office to a new one. An office relocation is physical while the server relocation is mostly non-physical once you transfer your data and turn off the old server.

Licenses. The software, hardware, and license lists were discussed previously. But during onboarding, you will discover what you missed. Part of the initial process is listing every software or program license you have with licensing codes, user names, and passwords. Regardless of how you handled software management with your existing physical server, your new cloud provider will handle all of it and all the details will be needed to install correctly. You will likely need to add licenses or obtain new versions of programs. Someone in your firm will have to order the new licenses, obtain the installation information and codes, and pay for it as the cloud provider only installs and maintains. Then send it to the cloud provider for the migration.

Discovery and Assessment. This phase involves making lists of everything about your firm and each person in it. All user names and passwords for signing onto your physical server, every program, etc. All email information, phone numbers, list of printers used by each person, all computers in the firm, all details on your local network, etc. This includes

your phone system if it is VOIP based. All information in Outlook for meeting rooms, groups in Contacts, etc. need identification. If you need to install new equipment as part of the migration, you should identify it early in the process. We needed two new computers and new router/firewalls for each office. Our exiting routers were nearing end of support. Our cloud vendor did not sell any hardware but made recommendations. With the worldwide chip shortages, we were not able to get everything in place by cutover day. Early planning is important on any hardware in your firm.

Planning and Coordination. This will be the review by the assigned onboarding specialist of all the supplied information. The specialist will access the physical server and the computers on the LAN to review them. And to review all the supplied information, request missing information, coordinate license information and upgrades/replacements, etc.

Build and Prep. The specialist will use the remote access to view your existing setup while starting to build your new server on the cloud provider's platform. At a point you will receive a portable drive to plug into your physical server and the specialist will begin the process of downloading your data onto it. More interaction will occur as the new cloud server is built and issues arise from the previously supplied information and software.

Data Gathering. On the day before the cutover day, all access to your physical server will be stopped for all users. As of a time late in the day, a final data download will be initiated to pick up all data not already on the portable drive. You will remove the portable drive and ship it to the specialist by overnight delivery. All members of you firm are down from this point until Cutover. Picking a day to be out of business other than phone calls and meetings is obviously tricky and important.

Cutover. The specialist will import the data from the portable drive onto the pre-configured new cloud sever. As everything gets up and running, the specialist will then start contacting each person in the firm to start their access to the cloud server. This involves putting the sign-on icon (remote desktop connection) onto each firm computer and providing the user name and password. Then each program is run and tested. The specialist will activate each person's access to every printer, scanner, etc. that is used by them.

Training and Support. Once the basic operations are operational for each user, the onboarding specialist moves on and the Help Desk becomes the source for any remaining transition issues.

Tech support. The cloud service will have a Help Desk for all your users to reach out for any IT issue. That is a great point for law firms that are not large enough to justify internal IT staff or on-call local IT. It also reduces the load on whoever in your law firm is the person (lawyer or staff) who is the one called on for IT questions – even just who to call for help. Each user has a direct email or phone number floating on their own version of the cloud to contact the Help Desk with questions.

Another side of that benefit is that the cloud provider has to install or update all software, etc. For security of the whole system, they do not allow users to load or update software. Exception - software that auto-updates when accessed. When a user receives a message that an update is needed or available, the user needs to send a request to the Help Desk. The Help Desk will respond immediately with a ticket number. But the actual update may be later in the day, etc. unless the user asks for a quicker response (which is available). So the work of getting the update completed is passed to the cloud provider (and does not add to the burden of someone in your firm) but there is a wait and a process.

Software used by everyone or many folks is another issue - when can it be updated? We use TABs and PraticeMaster which has upgrades every few weeks. There is a red update notice that shows up for each user. Obviously, a Help Desk request should not be sent in randomly by users. And the update cannot be installed while any user is on the program. So we designated one person (our billing staff person) to be responsible for sending in a ticket to the Help Desk. Then we had to work out when to have the updates installed. The Help Desk would do it at any time of our choosing during their normal hours (7AM to 7PM Central Time). So we choose 6 PM as we are all usually off of TABs at that time of day. In a larger operation, that may not be true so picking a time could be harder. You may even have to appoint someone to send an email out telling everyone to get off the program at a set time to allow the cloud provider to install the upgrade. We had the same issue with our physical server but it was all inside the firm. With a Help Desk doing the work, a little more coordination is needed.

These issues do not apply to system wide updates that the cloud provider runs themselves. For example, an update to MS Office would be initiated by the cloud provider on its own. And it would be done overnight so as to not affect everyone.

File access outside the cloud. On our physical server, we could run any backup system we chose (IDrive was our most recent choice). We liked the redundancy of a local NAS device plus an online backup service. And each gave us access to prior versions of files. A cloud provider does not want you to use backup programs on your cloud server. The reason is security. The cloud provider would then be dependent on the security of that 3rd party for all of its own customers. If the backup system you used had a breach, it could get into the cloud provider system via the backups somehow. So the cloud provider does not want that risk. Our cloud provider offered a NAS and daily downloads that they set up as an alternative. But it comes at a higher price than a backup program like IDrive.

The limitation of access to your drive in the cloud is also a factor when you need even limited access. For example, at the completion of the engagement we provide every retirement plan client and every estate planning client with a USB drive that contains PDFs of all the relevant documents and letters. Especially on estate planning clients, they can put the originals in a safe deposit box and have the USB drive for easy access at home. Most clients like it. But you cannot copy files from your cloud drive to a USB drive plugged into your computer directly. The USB drive cannot be seen from your cloud. So you copy the files inside the cloud, then go to your local drive (one click), and then paste the files onto the USB drive that can be seen on that local drive. Normal Windows commands are used.

Also, if you should want some folders/files available without any internet access, the same process would be needed. An example would be while at a client office or in court where internet access might be limited or not good quality. The solution would be to copy those folders/files to a folder on your local C drive for such use. And deleting later, or if revised, copying back to the cloud drive.

If you have anyone with lack of trust on the backup redundancy of your cloud provider, this access limitation is also a problem. For example, if a firm member has been running a monthly download of his client folders to a local drive as an extra backup for his or her personal level of comfort, that will no

longer be possible directly from the cloud server. There are work arounds but this issue needs to be addressed in the migration process.

Virtual Meetings. ZOOM and other such programs may not be installed on your cloud server. Security issues again. So you run them from your local drive off of your cloud. That works but makes for difficulty in accessing documents on your cloud server during the call. You can copy them down to your local drive for the virtual meeting but you may need something unexpected. You can click back into your cloud to view an item but you lose seeing the Zoom screen while doing so. An obvious solution is to have two screens - one running your cloud space and one running your local drive programs/browser/etc.

Blocked Websites. The cloud providers have promised to protect your data and your law firm. They have also made that promise to all of the firms on their system. So they want to limit access to the internet, especially as to websites that could be risky or would require lots of bandwidth. The law firm itself has an interest in not allowed the least knowledge person in the firm to easily access dangerous websites. So the policy is good. But there will be websites that get blocked that may not make sense. A user can request that a blocked website be allowed (via the Help Desk ticket). Some will get approved and some may not. The solution proposed by the cloud provider is to minimize your cloud for a moment, go to your browser on your local computer and access the website your desire. That is workable unless you need to download something like an obituary to save to the client file for a probate. To do that you have to save the obituary on your local computer somewhere, then copy and paste it into the client file back on your cloud. [Not really too hard – you can copy and paste to and from your local computer and your cloud using the standard Windows commands.]

These are our experiences. Yours may vary.

Your Journey to the Cloud

The Onboarding Process

1. Discovery & Assessment [1-2 Weeks]
2. Planning & Coordination [1-2 Weeks]
3. Build & Prep [2-3 Weeks]
4. Data Gathering [1-2 Days]
5. Cutover [1-2 Days]
6. Training & Support [Ongoing]

Timelines are average.