

Is It Time to Upgrade to Microsoft Windows 7?

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Should an upgrade to Microsoft's Windows 7 be on the list of New Year's resolutions at your law firm? With the rollout of Microsoft's new operating system, it's time to think about whether your current version of Windows will meet your firm's needs or if it is time to invest in an upgrade.

For firms running either Microsoft's previous system, Vista, or the older platform, Windows XP, the question will be when, not if, they upgrade to Windows 7. Since Windows 7 was rolled out in 2009, we have found that it offers a very stable platform. To make the right decision for your firm, you should balance several variables. Check with vendors of the applications you use to determine if they are compatible with Windows 7. Expect that your applications will require some updating (i.e. newer versions) in order to be compatible. You should also consider when you will be replacing workstations, since that may be the logical start of the transition to Windows 7. If you want to use existing workstations with Windows 7, Microsoft offers a "Windows 7 Upgrade Advisor" tool on its Web site that will help decide if your current PCs will work, or if Windows 7 should be combined with workstation replacements.

The New Windows

For law firms that upgrade from Vista to Windows 7, the differences will be subtle, while those who are considering a jump from XP to Vista or Windows 7 will find more significant differences. With Windows 7, the desktop has a cleaner look, and it is easier to manage applications. Through the "Pin" and "Jump Lists," Microsoft has designed Windows 7

to allow quicker access to frequently used programs and files. Search functions are more robust, and file sharing and wireless networking capabilities have been improved as well, according to Microsoft.

One of the most appealing features of Windows 7 is enhanced security. Microsoft's "BitLocker to Go" extends data encryption to USB and flash drives, making it extremely difficult for unauthorized users to open files.

Of particular interest to non-IT attorneys and staff, Windows 7 is also designed to start and shut down quickly and to sleep and resume more efficiently.

Hardware and Software Considerations

Rather than upgrade to Vista when it became available, many firms chose to stay with Windows XP. However, some firms may have several attorneys and staff using Vista, because they needed new computers and those came loaded with Vista rather than the older operating system. Lawyers and staff who use Vista may have more motivation to move to Windows 7, since the interface will look quite familiar.

Attorneys and staff who have Windows XP do not need to rush into the new system, although they will want to do so before support for XP winds down in the next several years.

Hardware is another consideration. If the leases on your firm's computers are ending or you need to replace computers, it probably doesn't make sense to reload Windows XP or Vista onto a new computer. In those cases, upgrading to Windows 7 and moving to new software and hardware at the same time is probably a more efficient choice.

Training

Can you make the move to Windows 7 without providing training to attorneys and staff? Yes - while the interface is different, users could make their way through Windows 7. At a minimum, you would want to provide some guide or quick reference card explaining the basics of navigation. That said, training always helps with transition. If your users find change difficult, you will probably want to provide brief training sessions or webinars to explain the new interface. In most cases, we anticipate the upgrade to Windows 7 will be accompanied by an upgrade to Microsoft Office, which will require training. Windows 7 is typically covered at the start of these training sessions,

Integration and Other Technical Issues

For law firms, technical integration issues should always be a concern when considering any new hardware or software. Law firms rely on many different software applications, from time and billing to calendaring programs to client relationship management systems. If there are problems during an upgrade and records are lost or damaged, the time, effort and expense in restoring that information can be considerable.

In the seven months we've been using Windows 7 during normal business workflow, we have observed few problems with key law firm applications. Note the word "few" - there are several applications that have not yet released Windows 7-compatible versions. To address applications that do have issues, Windows 7 has been designed with built-in tools to help provide compatibility with programs currently running on Windows XP. In Windows XP mode, Windows 7 can run some (but not all) older applications that would otherwise not work. In order to ensure you do not suffer from integration issues during an upgrade, consider a three-step approach:

Step 1: Contact your software vendors about Windows 7 compatibility, and then make any necessary updates before or during migration.

Step 2: Set up a station with Windows 7 and all your applications loaded, then test the applications and note any issues.

Step 3: Develop a pilot of Windows 7 in your office. *This is essential.* Identify those in your office who use your mix of applications in their normal workflow. Pilot users need to use applications actively so you can get a real representation of their compatibility. Typically any issues will be addressed during this step.

If you plan to use existing computers, you have the option to upgrade your current Windows XP or start fresh, which entails re-installing your applications. Generally, our preference is implementing Windows 7 as a fresh start, rather than upgrading existing Windows XP workstations. Think of it this way - over the past three to five years, you probably have loaded and patched all your applications. During an upgrade, those patches are carried into your new environment. A new installation of Windows and your applications, while more time-consuming during upgrade, provides a consistent and clean operating system and application set.

Numerous Options

This year, law firms will find a plethora of upgrade options for hardware and software, and Windows 7 will be a component in these upgrade decisions. When deciding which choices to make, it's important for firms to consider their current mix of hardware and software and how compatible their current applications will be with a new operating system. This way, law firms can ensure that they make the right choices in 2010 and beyond.

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