**6 weeks to Proceed to Final Milestone!**

**(Everything completed and approved)**

**Accomplishments (July 23-27)**

**UAT/Workshops:**

* Brown Envelope Reports Testing (Thursday July 19 – not reported last week) – Heidi
* Soft Costs Testing (Tuesday July 24) – David
* Time Entry Testing (Tuesday July 24) – David
* Billing Testing (July 25 and July 27) – John
* Trust Testing (Thursday July 26) – David
* Accounts Payable Testing (Thursday July 26) – Heidi (75% complete; continues Aug 2)
* GL Testing – Heidi, MLVT, Catherine
* Cash Receipts –UAT rescheduled Aug 7. Was delayed due to issue in conversion data (fixed). - Heidi

**Go-Live Conversion Preparation:**

* Continuing cleanup of LV data by Billers. (John)
* New data cleanup issue identified – active client with no open matters and departed lawyers causing issues in NBI. Need to make the clients inactive. (John)

**Reports & Metrics**

* Reports: continuing balancing and testing of current 3E reports in CONV3 in preparation for Dave’s visit next week. (Catherine & Grayson)
* Compilation of additional report samples for Dave Roth to develop. (Catherine & Grayson)
* Clarity re-pointed to current instance of CON3 on Tuesday, July 24. (John)
* Clarity testing of current reports, updating GL account roll-ups and developing new Clarity reports. (Catherine & Grayson)

**Security**

* Security: continuing maintenance of Master, UAT6, DEV6, CONV3 and TRAINING. (Michelle)

**Infrastructure**

* Re-pointing of Clarity to CONV3 and migration of existing work to look at new data (July 24). (Scott, Raland)

**NBI Interface Development and Testing**

* Demo of NBI to Capensys on July 23. (Heidi)
* “New Business Intake Training Information” document reviewed by Sue Gagnon and delivered to Capensys. (Heidi, Sue)
* Started fixes for bugs uncovered during NBI/Conflicts Customization testing on July 19. (Raland, Dave Roth)
* Review and correction of CTEST3 NBI drop-down lists. (Michelle, Sue)
* Testing of NBI forms in CTEST3. (Michelle)
* Start creation of NBI forms test scripts (Michelle)
* Note: Capensys should hold-off testing for ECNM until Group Code filter is fixed (removes front zeros from Client number for clients without at group code and causes error.)
* Security error uncovered during NBI Testing – Workflow works for LA security; issues with Raland, Michelle’s and Heidi’s security – gets workflow error when releasing NBI.

**Bank Reconciliation Testing**

* Preparation of Bank Reconciliation file for automatic upload testing – developed Thursday July 26 so it can be tested on July 27. (David, Sue)

**Emergent Solution**

* Emergent Solution: Template issues are resolved. Waiting for CSD staff to return from vacation to demo. (Sue)

**eBilling**

* eBilling workshop – Tested 3 templates (LEDES98 TaskCodes, LEDES98 TaskTaxCodeOther,LEDES2000.) Second workshop planned on July 30 to continue testing other templates. (David, Grayson, Rhonda, Dylan)
* Note it is very important that Grayson is able to attend the July 30 eBilling workshop!

**Communications/Training – Front Office**

* NBI demo to Capensys on July 23. (Heidi)
* Capensys training on courseware maintenance and authoring kit for Captivate templates on July 24. (Tisha)
* Final review of SmartScript changes July 23/24 (Sue, Heidi, Tisha, MLVT)
* Classroom sessions scheduling – adjusted dates and modified registrations in viLMS (Tisha)
* Meeting with Barb Coleman to discuss leveraging AskMC functionality to support Elite Help Desk on July 19 (Tisha, Barb)
* eLearning scripts for Reading Conflicts Reports returned. Outstanding scripts e.g., NBI, under development. (Capensys, Tisha)
* Meeting with MT&L on updating internal website and communication strategy. (MLVT)
* Champion Energizer virtual bi-weekly discussion forums (Q&A, discussion forums) on July 26th (Tisha/MVLT)
* Commence Restricted Access Period Communication (MLVT)
* Review FAQs and Glossary (MLVT)

**Customization Test Scripts:**

* Completed Customization Test Scripts for: Trust, Collections, Cash Receipts, Time Capture, Accounts Payable. No custom scripts needed for Soft Costs. (Sue)

**Testing Uploads**

* Payroll Upload (for Partners) - Created transition spreadsheet to move data from Rhonda’s Partner payroll spreadsheet to BizTalk Upload spreadsheet. Skeleton is in place, data to be moved next week when Rhonda returns from vacation. – (Heidi and Rhonda)

**Other**

* INTapp Training: Arranged for delay in IT staff and Raland’s INTapp training until end of November. (MLVT)
* GO-LIVE planning: Started update of Go-Live Checklist.
* Status Meeting with Joan Swain and Ray Veneema (MLVT)
* Finalized non-billable task codes for management matters (MLVT)
* MLVT reviewed policies on Change Request, Change Control and Instance Management.

**Issues**

* **IN PROGRESS:** **Reports**
  + Financial Reports – not at risk as we still can get month-end financial report data from the system and export into Excel.Longstanding Clarity issue has slowed down development because of slowness of the workaround provided by IBM. Clarity enhancement is arriving sometime in September.
  + Custom Management Reports – **No issues list made available; unable to report on status. Correction: Catherine has created a list and will send it to Sue & Michelle.**
  + It is critical that Catherine MacDonald be available to work with Dave Roth when he is onsite July 30 – August 3. **This may mean that corporate July month-end reports will be delayed a few days. However, if Catherine is not made available, there is a high risk of reports not being ready for GO-Live.**
* **IN PROGRESS:** **Legal Vision Data** – Billing Clerks are starting cleanup of LV data. Issue with Rate Exception Header record. Sue to perform analysis to determine resolution of issue for Go-Live.
* **IN PROGRESS: Metric Retention Policy** –Meeting on July 18 resulted in identifying ten Action Items surrounding management of standard metrics and capturing information on Dave Roth Custom metrics. Dave Roth to provide more guidance next week.
* **New**: **Process for Moving Customizations i.e., reports, templates** – Concerns have arisen, as a result of report testing and UAT testing. Why are we missing approved customizations from the last UAT testing in the new UAT6 instance? There appears to be a flaw somewhere in the current process. This must be resolved. We need a flawless process for Go-Live.
* **New: Slipping Activities** – with 6 weeks to Proceed to Final sign-off and upcoming vacations, we need to catch up on slipping activities:
  + **Integrations**: GL Budget Loads (due July 20 – Catherine); Bank Reconciliation Load (due July 17 – David); Timekeeper Budget Upload (due Aug 3 at risk – Catherine); Payroll Partner GJ Load – end of July (Heidi); Payroll Employees GJ Load – end of July (Catherine)
  + **Reminder Statements** – at risk because we may need to develop a custom application. (John, Raland)
  + **eBilling** – Need to complete testing on all templates on July 30th. Raland will be returning from vacation on August 13 and will have a backlog of work waiting. Need to get **all** eBilling issues identified by July 30 so he can start fixes – there will be no time for a second round of testing! eBilling keeps losing momentum. We need to finish it up this time round!

**Next week's planned activities (July 30 – Aug 3)**

**July 30-Aug 3: Sue Gagnon is offsite Aug 7-10 Sue is onsite; Raland is on vacation.**

**TOP Priority next week:**

* **Reports**: Dave Roth on-site to work on Reports & Metrics, Timekeeper Budget Load, NBI (Heidi, Catherine, Grayson, MLVT)
* **NBI/Conflicts** need issues resolved by D. Roth early in the week in order for Michelle and Sue to perform testing while Dave Roth and Raland are on-site (Raland is on vacation August 7-10).

**Other Priorities:**

* July 30: eBillings Workshop (David Topple, Dylan, Rhonda, Grayson)
* July 31: Legal Vision month-end (MLVT, Heidi, David, Catherine, John)
* Aug 2-3: Go-Live Planning (Michelle, Sue)
* Aug 2: AP testing continuation
* Aug 3: Firm-wide announcement of Elite 3/Overview (MLVT, Tisha)

**Reports & Metrics**

* Work with Dave Roth to finalize reports. (Catherine, Grayson, Heidi, MLVT, Dave Roth)
* Test on DEV6 changes to the parameters pages for custom timekeeper dashboards so that 3E remembers the last timekeeper user selected. This test requires the user to have at least one mapped timekeeper. (Heidi, Sue)

**eBilling:** Second workshop planned on July 30 to test fixes to issues and further testing on other eBilling templates. (David, Dylan, Rhonda, Grayson)

**NBI/Conflicts Development and Testing**

* Address any issues from NBI/Conflicts Customization testing on July 18. (Heidi, Raland, Dave Roth)
* **Issues need to be resolved and finalized to proceed with testing while Dave Roth and Raland are on-site. Need to keep momentum up here and nail NBI down!!**
* Continue developing NBI test scripts. (Michelle)
* Support Capensys in development of eLearning. (Heidi, Michelle)

**Customization Test Scripts**: Continue developing customization scripts for GL, Billings, Templates, NBI forms, NBI/Conflicts process, User Roles. (Sue, Heidi, Michelle)

**Communications/Training – Front Office**

* Firm communication from MLVT August 3 (MLVT)
* Push-out Overview eLearning (Tisha)
* Review of Pathfinder roles. (Tisha)
* Ask MC meeting (Barb, Tisha)
* Finalize and post FAQs and restricted access period information on website (MLVT)

**Go-Live Conversion Preparation:**

* Issue with Exception Rate Header record. Sue performed analysis to determine resolution of issue for Go-Live. Needs to arrange meeting with Heidi and MLVT to discuss. (Sue, Heidi, MLVT)
* Continuing cleanup of LV data by Billers. (John)

**Security:** Security: continuing maintenance of Master, UAT6, DEV6 and TRAINING. (Michelle)

**Infrastructure**

* Removing UAT5 and DEV5 instances needs to be coordinated with users after UAT testing is complete.  (Scott, Sue)
* MLVT reviewed policies on Change Request, Change Control and Instance Management. Needs to discuss with Heidi in next couple of weeks.

**Documentation**

* Other draft documentation - Timekeeper budget load, Payroll journal loads
* Review of completed draft documentation – use as a guideline when testing uploads:
  + Biz Talk 3E Budget Load Manual (Sue, Catherine)
  + Biz Talk 3E General Journal Load Manual (Sue, Heidi)
  + Biz Talk 3E Bank Statement Load (Reconciliation upload) (David Topple, Sue)
  + Biz Talk 3E Custom Export Manual - outbound client matter data for Equitrac, Worksite, and web-apps (Sue, Raland)
  + Biz Talk 3E Custom Cost Load Manual
  + Help Desk User Setup Manual (Sue, Michelle)
* Outstanding Documentation: Timekeeper Budget Upload (D. Roth); CSD Billing (D. Roth)

**Testing Uploads (these uploads may slip due to limited time availability of Catherine)**

* GJ Upload - Payroll Upload (for Partners) – (Heidi and Rhonda)
  + Move data to skeleton spreadsheet (to be used to transition from Rhonda’s Partner payroll spreadsheet to BizTalk Upload spreadsheet);
  + test upload between partner payroll spreadsheet and BizTalk Upload spreadsheet;
  + test BizTalk Upload
* GJ Upload - Payroll Upload HR (for employees) –
  + Meet with Tisha and Ceridian to discuss sample data for employee payroll journal upload. (Catherine, Tisha, Ceridian)
  + obtain specifications for the Biz Talk Payroll Journals Load and create spreadsheet for sample data (Catherine MacDonald)

**Other Priorities**

* Action Item 188: Review and confirmation of Period Override Permissions. Impacts posting of prior period entries if not in place. Will be addressed when balancing with Elite at Go-Live. (David and Heidi)
* Action Item 12: French invoice (John) and dictionary for time capture (David) to be tested by French end users. Part of UAT. (John, David)
* Reminder Statements: Fix issue on invoice address changes. This exception has been investigated to discover how often it happens and the underlying process. May need to write a custom process for this. (Heidi, John, Raland)
* Emergent –Demo of Emergent to CSD when Sue is on-site in August 7-10.