APPLICATION INTAKE FORM: LAW FIRM SUPPORT DESK

Application Owner	**Julia (ext 1234), jdoe@firm.com**
	Schedule: M - F 8:00 - 4:00 (available via Bberry)

Name of Product	Templates to Go		
Other Names Product goes by:	"template package"		
Vendor Name	ABC Template Company		
Detailed Vendor Contact Info	1 One Street		
Contact Name	John Doe (Solutions Consultant); 800-555-1212 X 204 Fax 800-555-1234,john.doe@company.com	Project Manager / Support Analyst: Tom Brady 800-555-1212 X 204 Fax 800-555-1234,john.doe@company.com	iCreate Admin Trainer: Bill Belichick\ 800-555-1212 X 204 Fax 800-555-1234,john.doe@company.com
License Numbers	1234-5678-ABCD-EFGH		
Latest Version(s) Deployed	Templates To Go 7		
Associated AD Groups	TemplateAdmin (group)TemplateService (user)		
Escalation Groups			
Source File Location	\\lawfirm.com\dfs\LEGAL-APPS\iCreate\Installation Files		

SAMPLE APPLICATION INTAKE FORM

Application Owner	**Julia (ext 1234), jdoe@firm.com**
Estimated Time to Install	
Location of License(s)	LicenseKeys.txt in "\\lawfirm.com\dfs\LEGAL-APPS\iCreate\Installation Files"
Maintenance Information	Contract located in iManage; 1369845
Maintenance Dates	Beginning: 02/01/2011 - 02/01/02013
Support Login Information	www.esqinc.com, choose Support Center, then Login UN is Firm PW is abc10
Location of Contract	Electronically: iManage Hard Copy Signed Record in Boston Records Dept.
Location of Technical Documentation	\\lawfirm.com\dfs\LEGAL-APPS\iCreate\Training Documentation Files
Location of End User Training Material	\\lawfirm.com\dfs\LEGAL-APPS\iCreate\EUG Guides
Location of Other Pertinent Application Information	
Customizations	Click Here
Installation Instructions	

SAMPLE APPLICATION INTAKE FORM

Application Owner	**Julia (ext 1234), jdoe@firm.com**
PRICING	**Pricing (TemplatestoGo) 400 users)** 400 users @ $000 per user – includes initial lifetime license and first 2 years of support (SSS*) Support (SSS*): $000 per user/per year – [year 3 and beyond] **Total:** $000,000

FIRM Toolbar Summary (Main Template FIRM.DOT) (PRE CONVERSION)				
Icon	**ToolTip**	**Action**	**Upgrade to iCreate?**	**Template Associated**
	Letterhead	Launches Letterhead Wizard.	YES	FirmEltr.dot
	Memo	Launches Memo Wizard.	YES	FIRMMEMO.DOT
		Inserts Doc ID at Cursor Position - Word 2003 DM Docs only..	NO (We have a product for this, though I'm not sure where/how it will be deployed)	Using either RBRO or iDocID
	Document Number	Inserts Doc ID at Cursor Position -	NO	Obsolete
	Circular 230 Disclosure	Launches Circular 230 Disclosure Wizard.	YES	Circular 230 Disclosure.pot
	Close	Closes document, prompts to Save, if modified.	NO	User Survey: Never used
	BillBack Login	Links to the Billback login screen. http://Firm-billback/ibb/login.jsp	NO	Accessed via web
	London Footer	Inserts London Footer graphic in document footer.	NO	Obsolete
	Insert Firm Logo	Inserts Firm logo at cursor position	YES	BR Tools Ribbon
	Prepare Old Letter	Resets Margins to print on Firm LLP stationery.	NO	Obsolete
	Insert Address	Allows you to insert an address from your Outlook Address Book.	NO	Included in iCreate
	Envelopes and Labels	Launches Word's Envelopes and Labels dialog box.	PENDING: we got a lot of hits on usage of this tool	Included in iCreate

FIRM Toolbar Summary (Main Template FIRM.DOT) (PRE CONVERSION)				
Icon	**ToolTip**	**Action**	**Upgrade to iCreate?**	**Template Associated**
	RightFax	Launches ezFax dialog box to create fax cover sheet, results in additional toolbar icons that allow faxing of multiple documents.	NO	Included in iCreate
	Print Letter	Runs macro that will pull first page from printer tray 2 and all other pages from printer tray 1then launches Print Dialog box.	YES	BR Tools Ribbon
	Print Draft	Runs macro that pulls all pages from printer tray 3 then launches Print Dialog box.	YES	BR Tools Ribbon
	Print Page	Prints current page to default printer.	YES	BR Tools Ribbon
	Add DRAFT to Header	Adds "Firm Draft" and the current date to Header	YES	BR Tools Ribbon
	View Header	Opens document Header and launches Header & Footer toolbar	YES	BR Tools Ribbon
	View Footer	Opens document Footer and launches Header & Footer toolbar	YES	BR Tools Ribbon
	Keep with Next	Adds Keep with Next formatting to selected Paragraph(s)	YES	BR Tools Ribbon
	Para Spacing 12	Adds 12pt Spacing After selected Paragraph(s)	YES	BR Tools Ribbon
	Para Spacing 0	Resets Paragraph Spacing After to 0 pts.	YES	BR Tools Ribbon

FIRM Toolbar Summary (Main Template FIRM.DOT) (PRE CONVERSION)				
Icon	**ToolTip**	**Action**	**Upgrade to iCreate?**	**Template Associated**
	Change Case	Launches Word's Change Case dialog box	YES	BR Tools Ribbon
	Protect Unprotect Form No Reset	Protects/Unprotects Document Form without resetting form fields	YES	BR Tools Ribbon
	BR Google Search	Launches Link to: http://google.brfg.com /search?access	NO	User Survey: Never used

Column1	Column2
Customizations/Change Requests to Product (once decided upon)	
Tasks	Notes
Identify an internal SME	
Current Inventory of Templates	Keep general at this step
Breakdown of Available Templates	Organize by practice area
Breakdown of Available Macros	Organize by practice area
Survey of Usage of Available Macros/Templates	Confirm what you are working with to deploy
Survey of any Legal/Regulatory Reasons to keep (a) Macros/Templates	Use labels like: Required and Transferable; Required and Need Dev Time: Obsolete; User Survey (Required); User Survey (Liked but Not Required)
Semifinal list of macros/templates to transfer	
Meet with stakeholders on semifinal list	
Confer with vendor on product features to add to deployment	
Constantly ask "What do we NOT know?" "What are we NOT thinking of" and "Who have we NOT involved?"	
Begin (and maintain) an "App Intake Form"	See First Sheet
Create (or tweak) current change request process	A large percentage of templates will require changes that need to be managed
Consider size of rollout and appetite of end users (and resources)	Can deployment be broken in to Phases and, if so, what do Phase I and subsequent phases consist of?