

# Embrace Office 2013, But Avoid Microsoft's Migration Strategy.

## Overview

Microsoft Office 2013 is now available and many enterprises are considering this upgrade. Office 2003 users need to get moving on an upgrade path soon since product support for Office 2003 ends in April 2014, but Office 2007 and 2010 enterprises should also consider the new features that Office 2013 offers:

- Updated user-interface to improve ease-of-use and increase end-user productivity
- Access to Office 365 to leverage cloud computing
- Enhanced Adobe PDF editing capabilities
- Adjustments for more efficient use on smart phones and tablets
- Additional Excel templates along with a new analysis tool and easier chart generation capabilities
- Improved formatting and design functionality within PowerPoint

As much as Microsoft customers should embrace Office 2013, they should also beware of the “process” Microsoft recommends for Office 2013 upgrades, which include the use of its free upgrade assessment tool called Telemetry. While the new capabilities offered by Office 2013 merit consideration, the process Microsoft recommends for migrations can cause serious headaches—both for end-users that experience malfunctioning files as well as IT personnel that must then scramble to fix the problems.

## The Pitfalls of Taking Migration Advice from Microsoft

Microsoft is in the business of selling software. Period. Its focus, as well it should be, is creating as much revenue for its product and to get businesses to deploy as many new versions of Microsoft Office 2013 as they can. We certainly do not begrudge them this. Microsoft Office is one of the most powerful and widely-used pieces of software that businesses of all sizes have come to rely on.

However, businesses should seriously question their migration recommendations—or what we like to call the “don’t worry, be happy” strategy. Microsoft, utilizing Telemetry, is actively promoting a process that goes against common best practices when companies begin upgrading to Office 2013.

The recommended Microsoft “migration process” downplays early, comprehensive file discovery and corresponding risk planning. The tool and the process also present several other conditions likely to cause major headaches, undue delay and possibly additional costs. Here are two examples:

**Microsoft recommends passively testing for migration issues for only one or two months.** This may sound adequate in theory; why worry about files that hardly ever get opened, right? In reality, however, many business-critical files may only be used quarterly or in some cases, less. These are the same complex files that often pose the most serious issues. To ignore critical files until you “need them” is probably not an acceptable risk-mitigation strategy.

Also, the way Telemetry needs to be set up to monitor Office file use may be problematic for some companies. File testing is done passively by the Telemetry agent, which needs to be installed on individual desktops. This requires the agent to “monitor” file usage over a period of time to create a heat map of potentially problematic files for that specific user.

To even begin to assess which files may be at risk, the agent would need to be installed for a minimum of three to six months. Compound this factor with the additional condition that the way the agent deems a file as stable may not be entirely accurate. For example, if a file is opened but does not execute a piece of VBA in the file (such as when someone just opens a file to read but does not update), Telemetry may flag this file as “stable” which could result in it being passed over for further analysis. .

Lastly, and where the real hidden costs of an upgrade occur, by reactively fixing conflicts after users discover them can cause stress along with productivity losses for end users and IT support.

**Microsoft promotes concurrently running both Office 2013 and the older version of Office.** Most IT professionals would agree: No enterprise should support two versions of Office within one build on a desktop and tell users to just use the older version if Office 2013 does not work properly with a file (assuming that the incompatibility is obvious to the end user). Plus, if your legacy version is Office 2003 which will no longer be supported by Microsoft that alone may render this option unacceptable by an enterprise.

Imagine the absurdity of taking this mitigation approach with an ERP application or a new website! This recommendation could prove to be a major hassle for users as they try to figure out which version to use, and it could cause desktop support issues for IT.

## The Recommended Office 2013 Migration Methodology

Most successful Office migrations typically follow a well-planned process where areas of risk are identified up front and files are fully tested in advance for conflicts, particularly if the migration is combined with a desktop hardware refresh. An alternative approach to Microsoft’s methodology comes from ConverterTechnology’s suite of tools, including OfficeConverter and Click2Fix.

The solution supports traditional migration best practices to help enterprises overcome file-compatibility deployment hurdles presented by newer versions of Office, including Office 2013. Using ConverterTechnology’s suite of tools and methods, enterprises can collect and organize information that delivers precise and actionable decision support for migration planning. This capability is critical since the quality of data in enterprise files and the nature of file use, as well as the role of each file in supporting business processes significantly affects the scope and logistics of migration projects.

Much of the information ConverterTechnology derives from file analysis can be used for project scoping in advance of automated scanning and converting files to make them compatible with Office 2013. OfficeConverter achieves this by performing four essential tasks that lead to efficient and well-managed Office 2013 deployments and file migrations:

- File Discovery
- Compatibility Scans
- Bulk File Conversion
- Code Repair

For Office 2013 migrations, Microsoft provides guidance on issues and recommendations relating to infrastructure upgrades—the process of deploying systems, networks, and software associated with platform upgrades.

ConverterTechnology complements this by focusing on planning and managing the movement and upgrade of Office files that support the use of the infrastructure upgrades.

Deployment teams must be proactive to understand the nature and number of factors affecting file compatibility. Equipped with this knowledge, the project team can develop a healthy plan to address issues appropriately and minimize risk.

## Position Your Company to Take Full Advantage of Office 2013

As stated at the beginning of this article, the newest versions of Office, including Office 2013, are incredibly powerful tools that can help businesses run more efficiently and create competitive advantages.

But Microsoft, by suggesting you simply hit the deployment button and not worry about it, is ultimately creating competitive disadvantages. When bypassing risk mitigation up front and kicking the can down the road by running two versions of Office, you place the migration burden onto your business units that then have to identify and fix problems—as users bounce back-and-forth between two Office versions. This fix-on-fail approach will likely cause many important business processes to break down and, at the very least, a disruption to end users

Conversely, by following the ConverterTechnology process—proactive file testing to identify at-risk files followed by automated file remediation, combined with a self-service portal for end-user nominated file testing, your business will enjoy a much smoother transition to Microsoft 2013. Just as importantly, your end users will be able to take full advantage of the new features Office 2013 offers and raise their productivity to new levels.

For more information on how to migrate to the newest versions of Microsoft Office, including Office 2013, we encourage you to visit our website, [www.convertertechnology.com](http://www.convertertechnology.com)

### About Shawn Allaway

Shawn Allaway is a proven enterprise IT veteran with over two decades of experience driving revenue growth and streamlining operations. Before joining ConverterTechnology in 2009, Allaway held executive and senior management positions at NWN Corporation, Navisite, Navint Consulting and Surebridge.