

Migrating to Office 2010 - Factors to Consider

Factors to consider for effectively planning your deployment of Office 2010

The Office 2010 release has several characteristics that are different from prior releases. Consider the following factors:

1. Microsoft has altered their documentation of incompatibilities in VBA code. They now use “hidden” to describe syntax that is no longer used. In our research, some “hidden” commands work, some do not. See this link [http://msdn.microsoft.com/en-us/library/ee836187\(office.14\).aspx](http://msdn.microsoft.com/en-us/library/ee836187(office.14).aspx) for examples.
2. Since Microsoft has implemented different file extensions, all Office 2003 and earlier files that get converted that are the target of links will need to have the links changed. These links could be anywhere in the enterprise – Other Office documents, HTML pages, desktop shortcuts, etc.

There is no one right approach, and an enterprise needs to balance all the options with the business needs and overall deployment strategy. The following chart lists different options, and the advantages and challenges of each:

| Approach | Description | Advantages | Challenges |
|------------------------|--|--|---|
| Big Bang | Upgrade all Desktops, and remediate and convert all files at once | No Compatibility Mode (1) Links (2) all updated at once | Deployment window (3) Help Desk Window (4) Training (5) |
| Phased Approach | Upgrade desktops, and remediate files in phases. Phases can be geographic or business related. After the last phase is complete, convert all files. | Deployment Window (3) Help Desk window (4) spread out Training5 spread out | Compatibility Mode (1) Multiple changes for users All files are altered twice (first for remediation, second for links) |

Items listed in the chart above are detailed below:

1. **Compatibility Mode** - Running Office 2010 in compatibility mode introduces several challenges.
 - Some compatibility issues are different and/or unique in compatibility mode.
 - Most new functionality is not available in compatibility mode. (See Compatibility table below)

| Office Application | | Office 97 | Office 2000 | Office XP/2003 |
|--------------------|------|-----------|-------------------|----------------|
| Excel | Open | No | Yes | Yes |
| | Edit | No | No | Yes |
| | Save | No | Not within Office | Yes |
| Word | Open | No | Yes | Yes |
| | Edit | No | Yes | Yes |
| | Save | No | Yes | Yes |
| PowerPoint | Open | No | Yes | Yes |
| | Edit | No | No | Yes |
| | Save | No | Not within Office | Yes |

2. **Links** - Require repair when the file conversion occurs. The method of deployment has major implications on when and how the links were repaired.
3. **Deployment Window** - There is a large amount of processing required to remediate files and to repair links. Significant planning and benchmarking needs to be done to ensure enough resources are applied to complete the process in the deployment window. Disk space, additional backups, network utilization and fallback plans need to be considered. Significant planning should be undertaken to reduce the scope of the project by reviewing file aging and duplicate file characteristics of the environment.
4. **Help Desk Window** - The amount of change the organization undergoes correlates to the amount of Help Desk activity that follows. Spreading out the change over time helps to assure the Help Desk can provide a high level of service.
5. **Training** - Training needs to be done to assure the users are able to use the new Office features. This training needs to be delivered close to the time of deployment and therefore the deployment plan needs to assure enough training resources are available.

Other factors to consider when planning an Office 2010 deployment

Add-ins - All add-ins must be reviewed for compatibility with Office 2010. If Office is upgraded, many add-ins will be brought along. If Office is installed rather than upgraded, add-ins that were contained in Office (rather than in the registry) will be lost.

Access Executable files (.MDE) All files with .MDE extensions are incompatible with Office 2010 and will need to be dealt with by locating the source code and converting to ACCDE. ACCDE is the file extension for Office Access 2010 files that are in “execute only” mode. ACCDE files have all Visual Basic for Applications (VBA) source code removed. A user of an ACCDE file can only execute VBA code, not modify it.

Project References - that are included with applications must remain available to the application. Factors that will affect the availability of these references are:

- Office Install or upgrade
- Operating system upgrades as part of the deployment
- Hardware refresh as part of the deployment

Security - Office 2010 utilizes the Trust Center for document security and macro security. The Trust Center settings must be considered as part of a deployment. Access security has additional considerations. Prior to Office 2010, Workgroup Security (.MDW) was available to secure Access applications. Office 2010 (native mode) does not support Workgroup security and therefore a security model must be planned and implemented as part of the deployment.

Secured Files - Files that are secured in any way will require the password to remediate. This password gathering exercise should be part of the deployment plan.

Data Access Pages – MS Access 2010 does not allow data access pages to be created, modified or imported. Microsoft recommends replacing data access page functionality with SharePoint Services, collecting data via email (such as surveys) or leaving MS Access applications containing data access pages in the existing version of Access.

Outlook - Files attached to Outlook messages will not be remediated and need to be addressed in the planning process.

Word Versions - In Office 2003 and earlier, Word had a facility to store multiple versions of a document within one file. Starting with Office 2007, Word no longer supports this feature.

Access table links to Excel – In Office 2003 SP2 the Access table links to Excel spreadsheets changed. Installation of this patch on prevents users from changing, adding, or deleting data in previously existing Access table links to Excel spreadsheets although this was possible prior to SP2. This “read only” functionality applies Office versions including:

- Office 2010
- Office2003 with SP2 or later
- Office 2002 with updates of October 18, 2005 or later

Users currently running earlier versions of Office and upgrade to Office 2010 are affected by this change. Users running Office 2003 SP1 and install SP2 or SP3 are affected.