

Challenges and Solutions in Enterprise Deployment Methods

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Introduction

All enterprise IT projects have their inherent challenges and a Microsoft Office upgrade is no exception. For Microsoft Office upgrades, one of the primary risks is anticipating the amount of data that may or may not upgrade correctly and, at the very least, will need to be analyzed for version incompatibilities. Because of these factors, enterprise upgrades are often more involved, expensive and time-consuming than expected. There are a number of issues that make the process even more daunting, including the sheer volume of files, potential risks and liability, staffing, jurisdictional and ownership issues. To deploy a new version of Microsoft Office successfully, companies must be aware of the challenges, create a strategic plan to mitigate the risks and take advantage of effective tools for the job.

IT departments often have a number of valid concerns around deployment:

TOO MUCH DATA. In many cases, IT departments are concerned that they are analyzing too many files and they are going to find too many problems. Some organizations have millions of files to manage, and IT realizes that finding and fixing these files will be costly and time consuming.

RISK FACTORS. Without the right tools, IT departments can not have an accurate picture of how big the problems are, or which files are actually at risk. IT needs a clear understanding of the risk factors before tackling an upgrade project so they can plan and proceed accordingly. Some companies resist a risk analysis, thinking it is unnecessary, but it is a critical step in the process to ensure success and minimize business disruption.

COST FACTORS. Deployment is expensive, and costs often exceed what was originally anticipated and budgeted. Many companies use the free tools that Microsoft offers, hoping to reduce costs, but quickly find that the tools do not offer a comprehensive solution. Microsoft's tools will list the general problems, but cannot fix them or even delve into the specific issues discovered. Free is sometimes good, but the free tools may not be the best bet when analyzing your company's critical files.

LIABILITY FACTORS. The IT department is responsible for servicing multiple business units and they worry about the risk and corresponding liability of a potentially catastrophic mistake. In many instances, a single broken file could cause extensive damage, cost significant money, result in major errors, and negatively impact a company's reputation. For example, picture the devastation that could occur if a financial company's broken link pulled outdated or incorrect data. On the trading floor, this broken file could, literally, cost the company and its clients millions of dollars.

OWNERSHIP ISSUES. A huge, ongoing issue is who has primary responsibility for the files during an upgrade. IT has no idea which files are business critical, so they are unable to effectively prioritize. The business units create and maintain the files, so they know which files are critical, but do not want to divert time out of their day to examine, prioritize or fix those files as part of an Office upgrade. The reality is that both sides have a mutual responsibility during the project.

The bulk of the responsibility for an upgrade deployment falls to the IT departments, but they often request participation by the business units. Sometimes, the business unit uncovers the problem and is expected to be part of the solution. IT may ask the business units to assist with visibility, identifying business critical files and testing

files to ensure that they work correctly.

No matter how the business units are involved in the process, IT still needs to manage the project's logistics, implement a plan and consider volume restrictions. They need to think through how much they can handle, how they will manage the turn-around time, determine additional resources that can be leveraged and how they can increase accuracy and reduce liability.

JURISDICTIONAL CONSIDERATIONS. Many enterprises not only face ownership issues, but also jurisdictional restrictions imposed internally and, in some cases, by local governments. These restrictions can throw yet another challenge into a Microsoft Office upgrade as it relates to staffing, rollout timelines and prioritization.

TIMING. IT departments debate about whether to wait for upgrade issues to be “delivered to their doorstep,” or proactively embark on the process to find and fix problems before they are reported. Compounding this issue is the lack of visibility, making it difficult to anticipate the magnitude of the problems and how they will impact IT support teams. An important factor to consider is that someone at some point is going to have to analyze and fix broken files. That most definitely comes with a cost to the enterprise, whether it is IT or the business unit affected.

STAFF. Enterprises must decide whether it is more cost effective to refocus their personnel to handle an enterprise-wide Microsoft Office upgrade – which is costly in terms of time and staff resources - or outsource part or all of the upgrade. Outsourcing can be expensive and add another dimension of complexity with the introduction of 3rd parties. In large companies with small IT departments, staffing issues around deploying an upgrade can be a major hurdle. They might want to outsource the project, but if there is not a budget earmarked, they will have to develop a less costly, yet effective, alternative solution.

Solutions

INFORM AND SUPPLY. A new industry trend, “Inform and Supply,” is a proactive approach, where IT is responsible for informing and educating business units about potential problems, including the possibility of broken links and macros. Then, IT supplies a tool or approach for end users. This empowers the end-user to identify the problems. The end-users can “nominate” files, supplying a copy of their most business critical files to IT via email or through their internal network, thus helping IT prioritize accordingly.

An increasing number of companies are opting to use this “Inform and Supply” approach, allowing business units to determine which files are most important and ensuring a more effective, efficient system. Also, it may help with jurisdictional issues, as self-service “kiosks” can be set up in various locales where appropriate. Involving the business units, and asking for their help in “scaling down” the project, makes deployment far more manageable. Some companies have a universe of millions of files, which can feel as overwhelming to IT as trying to “boil the ocean.” But if IT only addresses the small percentage of files that are truly business critical, the process becomes less daunting.

Even though the “Inform and Supply” approach reduces the scope of the data, without the appropriate tools, it is still a massive project requiring significant resources. IT must implement a network hardware infrastructure – email, tracking, server – to manage the system securely, cost-effectively and in a timely fashion.

FREE MICROSOFT TOOLS. Companies can and should use tools available from Microsoft and third parties to assess the upgrade environment. To assess at-risk files, Microsoft offers free tools that include:

The Office Code Compatibility Inspector for individual power users (OCCI). This desktop tool identifies VBA code and 64-bit compatibility issues in Excel, Word, and PowerPoint as an add-in. However, it evaluates individual files only — there is no batch processing.

The Office Migration Planning Manager for compatibility scans (OMPM). This command-line tool scans for Office files and detects issues with converting them to the Open XML format. A macro scan feature counts the number of potential VBA compatibility issues.

The Office Environment Assessment Tool reveals add-ins and applications in use (OEAT). This tool identifies the add-ins and applications used for Outlook, Word, Excel, and PowerPoint, as well as any applications that are calling Office APIs.

These tools can do large-scale assessments, but cannot automatically repair any files, and they lack the capabilities to detail the specifics about each individual document. Instead, they just report on quantities of files, which is not the all-encompassing solution that most companies need.

AUTOMATED TOOLS. Microsoft partners like ConverterTechnology offer proprietary tools to scan files and automatically correct most compatibility issues.

The OfficeConverter suite is ConverterTechnology's solution to file compatibility-related Office deployment hurdles. Using OfficeConverter tools and methods, program managers can collect and organize information that delivers precise and actionable decision support for upgrade planners. The quality of data about an enterprise's file landscape, and information on the nature of file use and role in supporting business process can significantly affect the scope and logistics of a project. In turn, the project scope and logistics directly affect the risks, costs, timelines that the project entails. Much of the information OfficeConverter derives from file analysis is intended for project scoping, in advance of automated scanning and converting files.

ConverterTechnology focuses on planning and managing the movement and upgrade of Microsoft Office files that support the use of infrastructure upgrades. These activities integrate with Microsoft's prescribed "best practice" for Business Desktop Deployment and can work with other methodologies used by enterprises and systems integrators to provide a framework and support for phases of a deployment.

OfficeConverter complements and extends that functionality by automating the discovery and repair of files that need to work in order for applications to run. Visual Basic for Applications (VBA), project references, file links and other file components may become dysfunctional as a result of the Microsoft Office upgrade and 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 the issues appropriately and with the right tools.

ConverterTechnology, experts in data risk management for enterprises, provides an innovative suite of solutions that offer comprehensive coverage of enterprise data risks that can arise during document and application migration, and solutions for network monitoring – data leaks, anomaly and intrusion detection. Founded in 1997, ConverterTechnology has helped millions of users at Fortune 500 companies, global financial and pharmaceutical corporations, and the world's most renowned theme park. ConverterTechnology is headquartered in Nashua, N.H., with offices in Europe and Australia. For more information, please visit <http://www.convertertechnology.com>.