

Microsoft Office Migration

BACKGROUND

We have offered automation and training services on the Microsoft Office range of products for as long as the products have been available, so you can be assured of being in safe hands as you transition from one version to another.

Some of our products use automation within Microsoft Word, Excel and Powerpoint for additional functionality.

For example, our Tradesman product which was originally written in 1986 using FoxBase+ (an xBase product for DOS from Fox Software Inc. eventually purchased by Microsoft) was designed to integrate with Word 1.0 for printing Estimates and Invoices.

Later incarnations of the product used Visual FoxPro 9.0 (Microsoft) with Word 95 and it is still in use today using Word 2010.

Our Final Accounts Production (FAP) system was written entirely in Excel VBA, starting life in Excel 97 but re-engineered for newer versions as they became available. When HRMC introduction electronic filing for Statutory Accounts, we wrote the iXBRL tagging solution to enhance FAP by storing essential tagging data behind the scenes using the Custom Properties feature of Excel. Our FAP system introduced new tools to Excel including automatic hiding of irrelevant sections, proper accountancy style formatting for columns, totals and underlining, a contents page, auto paging, auto working paper creation and many more useful features.

Other products such as our Registered Company Digital Display Board takes worksheet data entered via Excel and creates a Powerpoint presentation for display.

Finally, our Excel based Timesheet add-in uses lookup data from our Visual FoxPro based Time Recording system and then is imported to the same system on completion.

So yes, we have the background experience to be able to offer expert guidance on Office migration and any automation processes which may effect a smooth transition.

As Excel evolves it is only natural for some features to change functionality or to be removed in place of something better. Whilst Microsoft always aim to be backward compatible, there are some situations where some minor re-engineering is necessary to ensure the migration process is as seamless as possible.

For example, the 97 to 2003 file format was replaced in 2007 with better formats including a separation of concerns for those workbooks with and without macros (.xlsm and .xlsx).

In Excel 2013 the UI changed and with the introduction of Office 365 Microsoft embraced the age of the cloud, so that migration now offers more choices than ever before.

DISCOVERY PROCESS

With any planned migration, you need to know what the pitfalls are and the risk to the business before you take the plunge.

Far too many migrations are not thoroughly planned to take account of potential risks such as but not limited to:

- compatibility between versions
- third party integration issues
- deprecation, change to functionality and removal of features
- how performance might be affected
- how is sharing of documents in different formats supported
- what additional resources are required for migration
- post migration support and additional training requirements
- time and cost constraints
- volume of issues which may ensue

We can mitigate potential risks to the business by identifying areas which may require a change to the migration plan.

If required, our remit can also take into account benefits and improvements likely from migration such as the ability to use new and better features, time saving options and changes to business processes which may save both time and money.

We can tailor a discovery plan to meet your requirements or you can let us recommend the best options via our Discovery One Package.

As part of any discovery process we aim to identify at risk areas, hold workshops for business groups with demonstration of Office using their existing documents and share our findings with detailed reports and recommendations.

It is important to note that on-mass migration might not be possible or indeed desirable and pilot schemes need to be initiated to identify potential areas of risk.

Microsoft acknowledge that it may be necessary to run two versions of Office side-by-side to enable the functionality and proof of concept for business processes.

We can also offer any development time required where remedial action is required before the migration begins.

Post migration we can offer support and advice including training of users to help the business going forward. We can also offer additional documentation to help make the transition as smooth as possible.

DISCOVERY ONE PACKAGE

The Discovery One package is a four day discovery process where we will spend time on-site as follows:

- Day One
 - Project team meeting to discuss plan, systems and files to identify
 - Configuration for access to file shares and identification of files using our own tools
- Day Two
 - Workshop session(s) and project team review
- Day Three
 - Case studies and further investigations
 - Project team review of findings
- Day Four
 - Draft report creation detailing discovery findings, case studies and recommendations

It is not uncommon for the reporting process to take up to 8 hours to complete.

Note: Our Discovery One Package provides a framework which can be tailored or extended during the discovery process, so that time is spent for maximum benefit.

DISCOVERY TWO PACKAGE

Where the scale of the migration is not so straightforward or large in terms of scale of documents we can offer a slightly different approach to the discovery process as follows:

- First week to include two or more days discovery including plan discussion, identification of documents, workshop sessions and project review
- At least one week off-site (and/or on-site) to investigate issues and present interim findings
- Third week to include two or more days including case study evaluation, project team review and draft report detailing findings and recommendations

Note: Our Discovery Two Package has much more flexibility and gives time for reflection before moving forwards with the migration process.