



WHITE PAPER

Migration to the 2007 Microsoft Office System: A Roadmap for Success

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Introduction

Microsoft has updated its flagship product sets with the release of the new operating system, Microsoft Vista, and the productivity suite, the 2007 Microsoft Office system, to businesses. Microsoft is calling the launch of this new operating system and business application suite the most significant in its history.

Although this is a simultaneous launch, many organizations will find that deployment of the Office Suite before or independent of the Microsoft Vista operating system (OS) makes sense due to a lack of compelling drivers for the new OS. Even without the new OS, upgrading to the 2007 Microsoft Office system is a difficult and costly process that will benefit from the application of both best practices and automation.

This white paper will examine the issues presented with a migration to the 2007 Microsoft Office system including which organizations should be first movers and why. Next, the unique nature of this migration along with best practices specific to migrating to the 2007 Microsoft Office system will be examined. Last, the benefits of IT automation derived from use of a KBOX appliance will be highlighted through the case study of one mid-sized company **who saved over \$90,000** on single migration of 1600 PCs to a new version of Microsoft Office.

Who Should Deploy the 2007 Microsoft Office System?

After five years of development and some high-profile delays, Microsoft simultaneously launched Microsoft Vista and the 2007 Microsoft Office system to businesses in December 2006. Although this was a simultaneous launch, there are many reasons to implement Microsoft Vista and the 2007 Microsoft Office system separately. Foremost, Microsoft's "premium ready" requirements to take advantage of many of the benefits of Microsoft Vista (including a 1GHz processor, 1GB of system memory, and support for advanced graphics) will simply be too much to handle for many PCs in use today. According to a recent survey by Softchoice Corp¹, "About half of the average business PCs in North America are unable to meet the minimum requirements for Microsoft's Vista operating system, while 94 percent do not meet the system requirements for Vista Premium."

Further, although Microsoft hypes simplification, lower IT costs, and improved security as benefits of deploying the 2007 Microsoft Office system and Microsoft Vista together, many IT professionals don't see enough functional benefits to justify the costs. According to Gartner² "...we generally don't see the combined benefit of Microsoft Vista and the 2007 Microsoft Office system significantly exceeding the benefits of the sum of their parts."

As a result of these and other factors, many organizations will deploy the 2007 Microsoft Office system before and/or independent of Microsoft Vista. According to Gartner², companies with a clear-cut business justification should migrate, including companies that:

- Have many mobile users, run Exchange for email and run Office XP or earlier versions
- Run Windows 97 or 2000 and foresee interaction with the new Office XML file format
- See benefit in the new XML and/or Share Point capabilities
- Are not motivated to move to Microsoft Vista soon (before 2009)
- Run older Office versions and plan to skip Microsoft Vista and see value in the new system

¹ "Lack of Vista Readiness Pushes PC Lifecycle Management to the Forefront"; Softchoice, Dec, 2006

² "Deploy Windows Vista and Office 2007 Together, If It's Convenient"; Gartner, September, 2006

Attrition Versus Forklift Migrations

One of the initial considerations for IT management will be the question of “forklift” versus attrition based-migration. For companies that choose to run a forklift migration, the benefits include avoiding the cost and “pain” of running two versions of Microsoft office in parallel, such as managing separate UI’s, maintenance for both versions and application and file compatibility management between the two. However, the downside of a forklift migration is that a massive investment in hardware and end-user training on the new UI will be required.

For companies that choose attrition-based migration, the benefits include substitution of the large up-front investment with a rolling investment over time; however, they must then run two versions of Office in parallel. Indicators from the press and industry analysts show that many companies will choose this path regardless, as the large up-front costs associated with a forklift are prohibitive for many companies.

Migration Best Practices: 2007 Microsoft Office System

This section of the report will provide an overview of the unique nature of a migration to the 2007 Microsoft Office system and an overview of the key Best Practices. These Best Practices have been organized into four of the commonly recognized stages of a migration: Planning, Testing, Deployment and Post-Migration. They should be viewed as complimentary to any standard migration best practices that an organization uses, and specific to the 2007 Microsoft Office system.



In the planning stage, IT managers are focused on building the business case for migration, securing buy-in from senior management, and outlining the requirements of the project, such as timelines, schedules, impact on infrastructure and end-users, etc. Specifically for the 2007 Microsoft Office system, IT management should be aware of the following considerations.

Alignment of expectations will be a key success factor for this migration. The 2007 Microsoft Office system has been the subject of much speculation, so management or end-users may already have unrealistic expectations for the system, such as the new file format and the new UI. IT management should spend time understanding the expectations of management and end-users and ensuring realistic expectations are set. These qualitative expectations will define the success of the project for many stakeholders, regardless of the ROI achieved.

Hardware planning is crucial, as companies will need to be cognizant of their current hardware inventory for any migration. In the case of the 2007 Microsoft Office system, a 500MHz processor, 256 MB RAM and 1.5 GB hard disk are minimum requirements that some older PCs won't have. Software planning is also important, as Microsoft Windows Server 2003 or later, Microsoft Windows XP SP2 or later and Internet Explorer 6.0 SP1 or later are required to support migration to the 2007 Microsoft Office system. A complete audit of PC and server hardware and software is important to ensuring that current PC requirements are identified to assess which PCs should be migrated and which should be replaced.

File compatibility, specifically the sharing of content between Office versions, is another important consideration. The 2007 Microsoft Office system is backward compatible with Office 2003 and XP so end users can open and save in the older binary format. Converters are available for Office 2003 or XP users that will allow them to open the new XML format;

however, they will need to be installed. For users of Office 2000 or 97, there are stand alone converters that will allow them to read the new file format, but these will also need to be installed. These installs are likely best performed by IT, not left up to end-users. Therefore, a complete audit of current office suites to identify potential compatibility issues and necessary converter installations will be crucial.

Shielding end-users from some of the complexity of the 2007 Microsoft Office system should also be a major consideration. In many cases, IT management will find that paring down the presentation of the 2007 Microsoft Office system's features to the subset that matters to end-users is worthwhile. Again, this is likely best implemented by IT beforehand, and not left up to end users, to avoid confusion and downtime.



In the testing stage, compatibility with existing systems and the deployment steps should be tested including the capture of user settings and data, the provisioning of new software including any integration fixes, and the application of user settings.

Specifically for the 2007 Microsoft Office system, IT managers should be focused on the integration with line-of-business (LOB) applications in this stage. Microsoft Outlook in particular tends to be more integrated with LOB applications than it has in the past. Many companies have integrations with third party sales tools, for example, that enable launching an Outlook email from the LOB application. This integration will be compromised by migration. Also, any legacy applications that are integrated to Outlook or other components of the 2007 Microsoft Office system will be adversely affected. Considering the much wider set of integrations that will be impacted by this migration than in the past, "fixes" for issues such as these should be tested and documented thoroughly in this phase.



In the deployment stage, migration begins. In the case of the 2007 Microsoft Office system, departmental, location and even user-specific PC migrations will be important for a few reasons. As stated above, distributing LOB application integration "fixes," file converters, and UI settings will vary by department and even by user in some cases, yet getting these correct is crucial to a successful deployment. Users in remote locations, especially those without local IT support, will present particularly acute challenges due to WAN and firewall issues. In fact, IT may be forced to travel to remote sites in order to perform migrations.

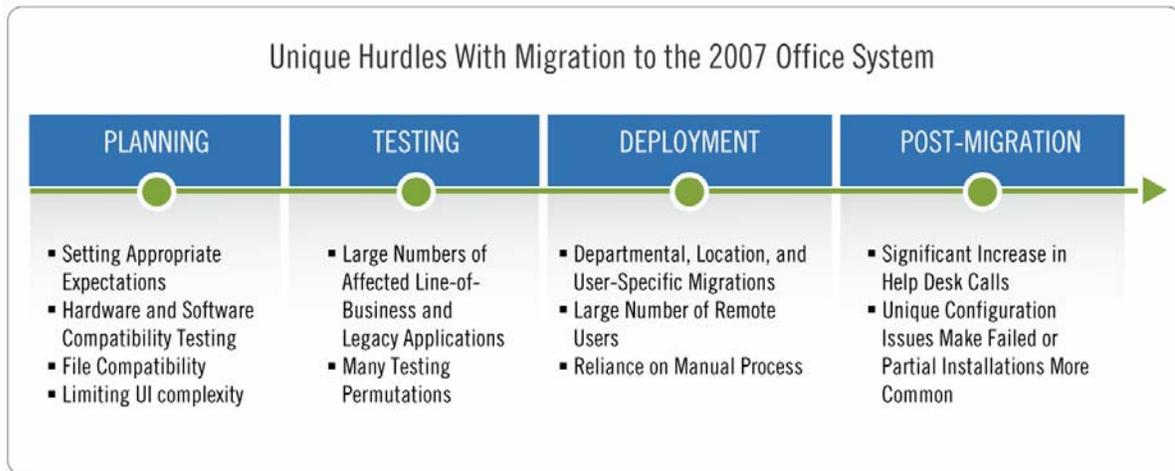
As a result of the myriad of dependencies required to successfully deploy the 2007 Microsoft Office system, department and location specific migrations are likely to be the norm, rather than the exception. Many IT departments using manual processes will be overwhelmed by the sheer amount of variability in their PCs current state, and the custom steps that will need to be applied to those PCs to get them in compliance with software and security requirements in the desired state. Even provisioning new PCs will be time consuming using manual methods. As a result, organizations will find it crucial to automate and provide remote support for as many of the processes as possible.



Post-migration tasks are typically focused on confirmation of configuration settings, deployments and stability as well as on end-user support. In particular to the 2007 Microsoft Office system, IT managers should be prepared for an even greater onslaught of help desk calls than is typical for a Microsoft Office migration, due to the new UI and the new file format. Even with strong communication and training, IT managers should investigate increasing the efficiency of their IT help desk process to ensure that group alerting, self assist, remote control and other best practices are in place to minimize help desk impact.

Further, reporting capabilities will be crucial as the myriad of different settings, LOB application integration “fixes,” patch upgrades and so on will make failures and partial installations more common than they have been in the past. An integrated, comprehensive and flexible reporting engine should be leveraged to ensure successful distribution, installation and stability.

Migration to the 2007 Microsoft Office systems will create unique hurdles for even the most advanced IT teams. Accurate planning, exhaustive testing, flexible deployment and an efficient post-migration process will mitigate the issues presented with this migration, which are highlighted in the exhibit below.



Automating Migrations with KBOX appliances

In general migrations are time and resource intensive activities that impact the entire organization, from IT architectures and infrastructure to business process and user behavior. The comprehensive nature of migrating to the 2007 Microsoft Office system, including the change in UI and file format, comprehensive hardware and software requirements, integration dependencies and an increased number of remote users is no exception. In fact, the complexities surrounding this migration presents such a hurdle for many mid-sized organizations that many will investigate the use of automation tools to assist them.

The bad news is that there are not many great choices for mid-sized organizations. Only the smallest companies (less than 100 nodes) will find that manual provisioning in combination with the “free” Microsoft tools will make economic sense. Beyond this, mid-sized businesses are faced with two bad choices from most third party software vendors; use a collection of point

solutions that only solve part of the problem and don't work well together, or break the budget for a comprehensive solution that was engineered for a large enterprise and add headcount.

The good news however, is the KBOX family of systems management and systems deployment appliances have been engineered from the start to be easy to use, comprehensive and affordable and are the only appliance-based solutions on the market that are specifically designed to meet the IT automation needs and budget of mid-sized organizations. In the case of the 2007 Microsoft Office system, KBOX appliances are literally "out-of-the box" automation solutions that cover the entire migration process, including tackling the thorniest issues.



During the planning phase of migration, KBOX inventory capabilities will auto-discover hardware and software configurations network wide, significantly improving efficiency. This functionality can save IT management the weeks or months that will be needed to accurately inventory the current state of the systems on their network, including hardware configuration, software inventory and versions, LOB applications, configurations, and more.

The KBOX's software metering capability can help to identify the relative importance of applications to your community, which will answer important planning questions. For example, if a particular LOB application gets used by 10% of the population, how should its integration "fix" be prioritized compared to an application that gets used by 80% of the population?



As the migration to the 2007 Microsoft Office system will require a large number of customizations due to LOB application integration "fixes," file converters, UI settings, etc., improving testing reliability and efficiency through KBOX's software distribution capabilities is a key value-driver. For example, during the testing phase, the KBOX's ability to remotely configure and change registry settings and distribute any digital media allows IT management to comprehensively test deployment remotely and securely. The flexible reporting engine allows for quick and easy reporting on the results of the testing process in person or remotely. Further, via the intuitive, easy to use scripting Wizard, IT management can test conditional, multi-department and multi-stage scripts and support the customized nature of the migration.



Next, the software distribution capabilities of the KBOX can put any concerns about departmental, location or even user-specific migration to rest. Remote distribution and installation of applications, patching, LOB application integration "fixes," service packs, updates, or any digital asset are available. Via the intuitive scripting wizard, IT managers can set conditional, multi-dependent and multi-stage scripts to distribute software from any web connected PC, in any manner that is necessary. Together, the software deployment and scripting capabilities mean that IT management can automate deployments via quiet and silent mode installation. Wake-on-LAN is supported for after-hour migrations, and replication and BITS support for throttling and resuming file downloads over slow links ensures the success of remote location deployments.

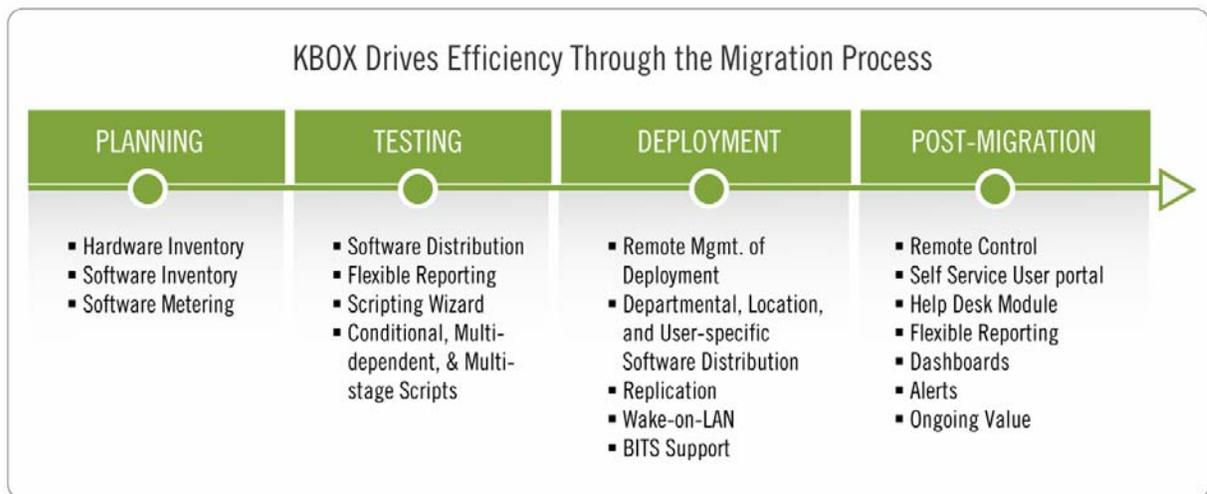
In the case that new PCs are acquired to replace older PCs that don't meet the 2007 Microsoft Office system requirements, KBOX's scripted installation and application slip-streaming capabilities ensure that automated provisioning can occur on local, remote, and even unattended PCs, significantly reducing the cost to provision new systems. Together, these capabilities will ensure that IT management has the flexibility to provide department, location or even user-specific deployment of the 2007 Microsoft Office system on current or new machines quickly and easily.



Also key to success with the 2007 Microsoft Office system, KBOX appliances can support post-migration issues. With Alerting, IT management can easily keep end-users up to date via configurable broadcast alerts to end users, avoiding the bevy of help desk calls that inevitably follow a network or PC impacting event. With Remote Control, help desk administrators can remotely fix post-migration issues without installing software, increasing their productivity. With the Self-Service user portal end users can download and install IT-controlled software packages, files and scripts without interaction with IT. Further, the KBOX Help Desk Module enables fast and efficient trouble ticket creation, tracking and resolution. KBOX appliance's flexible Reporting and Dashboards also ensures that IT management can easily generate routine and ad-hoc reports to track activities important to this migration such as deployment, installation, licensing, etc.

The complex nature of migrating to the 2007 Microsoft Office System will create inefficiencies for many companies. However, automation provided by the KBOX Systems Management and Systems Deployment Appliances will drive efficiency and success throughout the process. Examples of where KBOX functionality drives efficiency are captured in the Exhibit below.

It's also important to remember that even though KBOX appliances provide immediate value during a migration, the value doesn't end there. From ongoing inventory, software metering and patch management to security audit and enforcement and ongoing management, reporting and updates, KBOX provides value well into the future.



KBOX in Action

With deployment to hundreds of customers, the KBOX has proven itself in a multitude of real world scenarios. One manufacturing company in particular is a good case study for highlighting the use of the KBOX Systems Management Appliance for an Office migration.

The company is a Global Positioning System (GPS) manufacturer for the aviation and consumer markets with offices in the US, Europe and Asia. They employ 40 IT professionals managing a heterogeneous computing environment and were recently faced with migration to Microsoft Office 2003 from Office '97. In the end, they selected the KBOX Systems Management Appliance to manage an enterprise-wide migration of 1600 PCs.

The manufacturing company has seen significant gains from their investment in KBOX. According to the support analyst, "It would have cost us \$90,000 in labor to do a manual distribution of Office 2003. One of my selling points for the KBOX was that we could use this tool, migrate to Office 2003 across the company, and then just throw it away. We'd still be ahead!" For more on this company's success in using KBOX to migrate Microsoft Office versions, please visit:

http://www.kace.com/pdf/index_manufacturing.php

Conclusion

Migrating to the 2007 Microsoft Office system will not be a typical. Changes to the UI, file format and hardware specifications will make this the most challenging migration that IT departments face in the near future. Automation tools and best practices dramatically simplify the process while creating significant saving for organizations through:

- More accurate planning
- Less time on deployment
- Flexibility in deployment
- More reliable deployments
- Less user down-time
- Reduced travel time and expense

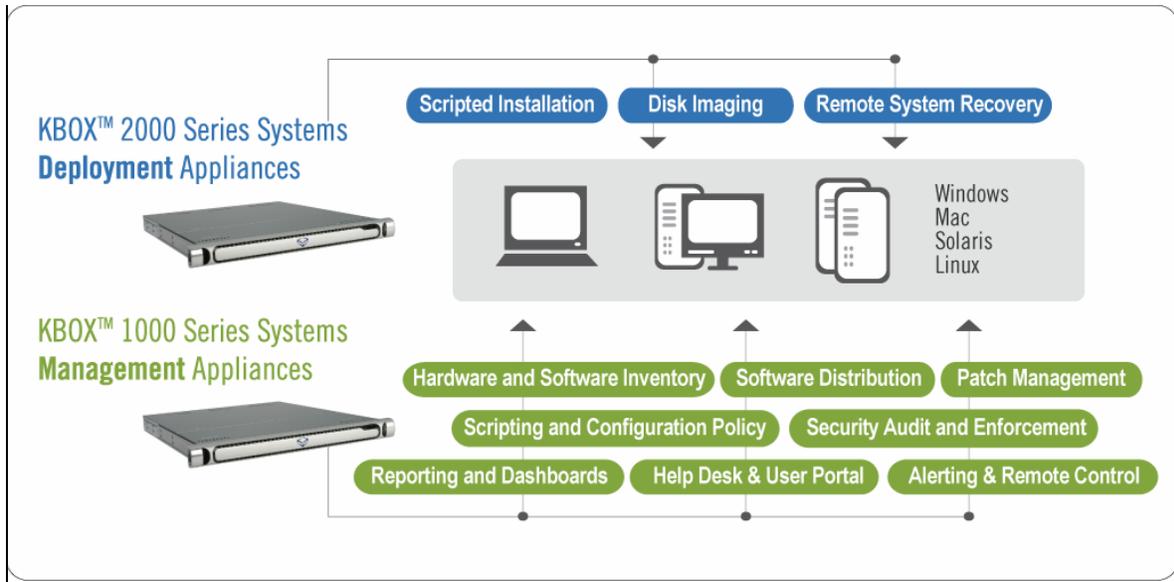
KBOX appliances provide the capabilities necessary to fully automate the migration process, and include support for all the capabilities that IT managers will need to ensure that migration to the 2007 Microsoft Office system is successful, in terms of distribution and cost, through:

- Automated hardware and software inventory
- Software Metering
- Automated software deployment and scripting
- Remote control
- Help desk
- Flexible, comprehensive reporting

KBOX appliances are also exceptionally easy to deploy and maintain, and feature plug-and-play deployment, agent-less provisioning, built-in data redundancy, automated backup and self-healing capabilities. KBOX appliances are a good choice for organizations looking for a comprehensive, affordable, and easy-to-use solution for implementing best practices in migration automation for the 2007 Microsoft Office system.

The KACE for KBOX

KBOX™ appliances are comprehensive, secure and make it easy and affordable for IT professionals to deploy and manage networked computers. Utilizing an Appliance-based Software Delivery (AbSD) architecture, KBOX appliances deliver a complete, pre-integrated bundle of operating environment and application software via dedicated server appliances. KBOX appliances provide support for a wide range of laptop, desktop and server platforms including Windows, Macintosh and Linux.



About the Author

David Hawley is Senior Manager Product Marketing at KACE and a 7 year veteran of the telecommunications and high-tech industry. At KACE, David is tasked with highlighting the capabilities of KBOX appliances and how they are used to solve the unique challenges faced by mid-market organizations. Prior to KACE, David held a variety of positions in consulting, market research and product marketing at The Yankee Group and Amdocs.

Corporate Background

KACE, a privately-held technology company, is the leader in IT automation appliances. Our vision at KACE is to deliver the unexpected—easy-to-use, comprehensive, affordable IT automation solutions that really work.

KACE is headquartered in Mountain View California, and has offices in North Carolina, Illinois and Texas.

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