



MIGRATION WHITEPAPER

MIGRATING FROM MICROSOFT OFFICE TO OPENOFFICE.ORG OR STAROFFICE 9

April, 2009

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Introduction to Migrating from Microsoft Office

Introduction

This brief whitepaper is designed to assist IT professionals and system integrators who want to move an organization from Microsoft Office 97/2000/XP/2003 to OpenOffice.org (OOo) or StarOffice (SO). The whitepaper provides a general framework for a migration to OOo/SO, including a discussion of the key technical aspects of migration planning and file conversion. The basic information that is needed to plan for contingencies during the critical pre-conversion and post-conversion stages of the migration is also provided.

There are additional white papers which give detailed information on migration and evaluation, and these are listed in the More Information Section at the end of this document.

To start with, an organization needs to assess:

1. Number Microsoft Office documents and templates need to be converted to the OOo/SO file format which is the ISO Standard OpenDocument file format (ODF),
2. Existing scripting and custom solutions that may need to be migrated
3. Current business rules and processes that may have to be adjusted to take advantage of all OOo/SO features.

There are some key architectural differences between these two office suites that affect the way the two products process and store information and data. However, there are also many similarities that make the switch to OOo/SO almost transparent to most users.

Please note that OpenOffice.org will be frequently referred to as OOo and the version implied will be OpenOffice.org 3.0.

StarOffice will be referred to also as SO and the version implied will be StarOffice 9.

OpenDocument Format will be referred to as ODF

OOo/SO Benefits

Licensing costs of Microsoft Office are generally very high. Here OOo/SO have a huge cost advantage, the cost of a StarOffice license is typically just 20% of a Microsoft Office license. The costs advantage can be even higher for users with more than one workstation or notebook. StarOffice licensing allows up to five StarOffice installations per user while Microsoft charges extra license fees for additional machines belonging to the same user. OpenOffice.org licensing is of course no charge and unlimited use.

There is no doubt that the licensing costs are just one of many costs but even considering this, OpenOffice.org or StarOffice, over the long term can yield up to 50% cost savings.

There are many more benefits - StarOffice and OpenOffice.org stores all your data in an ISO standardized OpenDocument (ODF) format and can also read and write files from Microsoft Office. The document format topic is critical and gets covered more extensively later in the document.

Finally the the platform independent architecture allows a smooth and easy transition to a non-Windows operating system, and this can open additional cost saving opportunities.

Migration Roadmap

An office suite is an integrated part of a company work flow and is essential for the daily business of most employees. So it is critical to plan and execute a migration carefully.

A migration process can be separated in 6 steps

1. Implementing a test phase
2. Creating an inventory of tools and Microsoft Office dependent solutions
3. Identifying documents and macros that are still in use
4. Organizing the migration team
5. Converting work-flow critical documents, templates and macros
6. Training and post-deployment support

1. Implementing A Pilot Phase

StarOffice and OpenOffice.org are to a large extent compatible with Microsoft Office but it is a different application with it is own capabilities and weaknesses, so a pilot is essential. This way you can identify issues that could affect the migration process as well as ensure that the workflow and exchange of documents work as intended.

It is recommended to test OpenOffice.org or StarOffice in a pilot with voluntary participants. The participants should also be representative in terms of job functions, and skill sets and to cover most if not all of a typical work flow.

All participants should be trained or at least have access to trained colleagues. This could be a help desk, if available. Another opportunity is to train a migration partner.

Simple “how-to” questions should be covered as described above with the help desk. Bugs and migration issues needs to be tracked for further analysis. Emails are the second best approach for large companies. There are a number Issue/Bug Tracking Systems available which could be used. Most of them providing web based interfaces, so the installation and maintenance is simple and the users can use their web browsers to create new issues. Furthermore these tools allowing to track the progress and run statistical analysis.

2. Creating An Inventory Of Tools And Microsoft Office Depended Solutions

There are a number of CRM, ERP among other applications which either depend on or provide interfaces to Microsoft Office. These applications need to be identified as they likely will need effort to get them to work with OpenOffice.org or StarOffice.

Team leads or IT managers that need to know which custom solutions are being used, should consider using they could be addressed by a questionnaires. Questionnaires have the advantage to get good insights on how these custom applications interact with Microsoft Office.

3. Identifying Documents And Macros That Are Still In Use

Moving to a new productivity environment also provides an opportunity for some “house cleaning.” Chances are that a good deal of the existing documents, templates, and business applications in your organization are no longer in use or will have outlived their usefulness after your move to from Microsoft Office.

Sun provides the Professional Analysis Wizard with StarOffice 9 to help you to create an inventory of existing Microsoft Word, Excel, and PowerPoint documents. This wizard uses Microsoft Office technology to create a precise report about the documents that you want to migrate to StarOffice. The wizard runs on Windows 98 SE, ME, 2000, XP, or 2003 and Microsoft Office 2000/XP. Note that OpenOffice.org users would need to purchase a services contract from Sun to get the Professional Analysis Wizard.

The wizard analyzes the Word, Excel, and PowerPoint in a directory and saves the results of the analysis to an Excel spreadsheet. The spreadsheet contains an inventory of the documents and the macros that you want to migrate as well as the potential costs of the migration.

To help the migration, ask your users to identify the files that are important to their work and the files that are no longer in use. To ensure everybody applies the same criteria when categorizing files, you should provide users with some guidelines.

- **Files still in use** are documents and templates that are typically modified on a daily, weekly, or monthly basis.
- **Files no longer in use** Files no longer in use should be classified as legacy or archival. Legacy files are documents and templates that have not been used for some time and will not be used again. Archival files are still used occasionally for printing and viewing. Instead of analyzing and converting these files, a quick solution is to back up the files to offline media. You can also use a document imaging solution, such as Adobe Acrobat, to save archival files in a universally accessible file format for future reference. Documents that can be set aside for archiving include correspondence letters, invoices, time sheets, basic reports, such as expense or status reports, and legal documents. Legal documents should never be converted because they are no longer binding if they are modified in any way.

Note – The StarOffice 9 Server is the perfect solution for converting a large number documents to PDF or ODF. Go to www.sun.com/soserver for details

You can also have users identify the files that are shared between organizational units in your company or with outside partners that use Microsoft Office. Shared files that contain macros or complex formatting should be closely monitored for changes when they move between different office environments.

4. Organizing The Migration Team

The size and make-up of your migration team will vary depending on the size and structure of your organization. The key role is the project manager, ideally a senior member of the IT department. The project manager visualizes the post migration environment, including potential trade-offs, based on company priorities, employee needs, and available resources. The project manager determines the scope of the migration from the information that was collected by the team on the current computing and document environments. The project manager then sets the time frame for converting documents and custom solutions as well as the deadline for using Microsoft Office in the company.

Other members of the team might include system administrators as well as other IT personnel in various roles as facilitators, developers, or administrators. System administrators would be responsible for configuring and maintaining StarOffice configuration schemes and custom solutions in the post-migration landscape. Trained IT technicians would be responsible for

supporting users during and after the migration. Such support is crucial to help users to become quickly productive.

Project leads organize the migration efforts at the business unit level. These efforts include documenting the current computing environments, identifying the effect of the migration on the user workflow in the business, how files and data are impacted, and communicating with stakeholders on progress.

5. Converting Work Flow Critical Documents Templates And Macros

The easiest way to convert Microsoft Word, Excel, and PowerPoint files is to use OpenOffice.org or StarOffice to open and to save the files in OpenDocument format.

In the case of small number of documents and templates, you can automate the conversion process with the help of the built-in Document **Converter AutoPilot**. For a larger number of documents and templates is the StarOffice 9 Server an option.

Note – All converted documents should be reviewed by their owners to verify the accuracy of the conversion.

Microsoft Office Macros cannot run instantly in StarOffice or OpenOffice.org because of some fundamental programmatic differences in the object model for each product. Fortunately the new Calc VBA emulation layer can convert some Microsoft Excel macros so they can run in OpenOffice.org or StarOffice. However note that only a subset of objects are implemented so only a select set of macros can be converted. With StarOffice your organization can still use its macros to increase productivity and to streamline workflow.

The migration to the StarOffice office suite provides an excellent opportunity to rethink your company's existing processes. For example, before you migrate any existing Visual Basic macros, try to determine if the macros are still needed. You can then discard the macros that are no longer useful. If you want, you can also re-engineer the remaining macros manually in SO/OOo Basic. You can also rewrite the existing macros as Java or C++ components. An advantage to this approach is the that the new components provide a performance boost over the Visual Basic macros. Another approach is to use web-based and collaborative Java-based applications. These components provide better run-time security and error-handling than Visual Basic macros.

6. Training And Support Options

Users could have new and somewhat different experiences with OpenOffice.org or StarOffice, since there will be conversion of documents and the use of new macros. As a result, your migration plan may also need to include training to help users become familiar with their new office suite. For example, users should be shown how to troubleshoot problems after a document has been converted. The training can be short as the user interface is familiar and users should be able to learn the new office suite fairly quickly.

To minimize support calls and maximize productivity from the start, you should prepare a "Welcome" package for users with information about the new desktop environment. This package should include a quick start guide designed to maintain user productivity by highlighting the similarities and differences between SO/OOo and Microsoft Office. The package should also explain the basic functionality and functional differences as well as a tutorial that introduces users to the SO/OOo Basic programming language, so that users can create their own macros. Contact Sun for all this customer tools and white papers.

Training for knowledge workers and advanced users are recommended to reduce the time it takes to learn the new office suite and attain their previous levels of productivity. As an

example, the Province of Genova¹ provides an 8-hour training for their knowledge workers. The training costs incurred are more than offset by the benefit of more productive users.

Note – To help facilitate your migration, you can determine the computer skills of your employees. You can then enlist employees with strong skills to assist fellow employees who require assistance with the migration.

Another option is online training. E-learning can save money at companies with more than 1,000 desktops. Average cost to create an e-learning course is \$100,000. That is \$100 per user for a 1,000 user company. E-learning can also lower training costs and provide greater flexibility as users can take the courses whenever they have the time¹.

¹ For more details : <http://europa.eu.int/idabc/en/document/4563/470>

Migrating Microsoft Office Based Solutions

An Office suite is often used for aggregating information from various sources. These sources are typically other applications which enable data to be added to documents. Microsoft Office has a set protocols for the communication with these applications. OpenOffice.org and StarOffice support all of protocols but due to the different object model, some may not be compatible with OOo/SO.

First of all it is important to determine how the application exchanges data with Microsoft Office. Generally there are three methods available:

The simplest method is to use files and documents. The solution creates a file or document which can be loaded by the user into Microsoft Office. This will work when using OpenOffice.org or StarOffice as well.

The second method uses the clipboard to transfer information and this also will work when using OpenOffice.org or StarOffice

The third method is when an application uses the Microsoft Office object model which will not work with since the object models of the two office suites are not compatible.

When you integrate external applications into OpenOffice.org or StarOffice, you need to distinguish between tailor-made solutions that are designed in house, and off-the-shelf solutions that are purchased from a third-party.

For off-the-shelf solutions, such as book-keeping and accounting, your migration options depend on the compatibility of the solution with OpenOffice.org or StarOffice. Otherwise, you can try to accomplish the same task in OOo/SO without using the custom solution. If the custom solution is still required, you have the following two options:

- Ask the vendor of the solution if they intend to release a version that supports OpenOffice.org and StarOffice. Otherwise, ask the vendor if they can build a solution for you. In both cases, you might have to find an interim solution until the new solution is available. For example, you might need to maintain one or more instances of Microsoft Office until the new solution arrives.
- Investigate and evaluate alternative solutions. Your alternative solution might be a custom solution that is built from scratch or a competitive product that does support OpenOffice.org and StarOffice. The [OpenOffice.org Solution](http://wiki.services.openoffice.org/wiki/OpenOffice.org_Solutions)¹ page provides a list of alternative solutions.

Migrating Databases

Base is the database application in OpenOffice.org and StarOffice. Base provides you with wizards to help you to create forms, reports, queries, and database tables so that you can easily access your data from within OpenOffice.org or StarOffice. A Base file stores the methods and layouts that you use to access a database.

Base can read and write data to the MySQL, JDBC, ODBC, Microsoft Access, Text, dBASE, and ADO interfaces as well as to spreadsheet data sources. The Microsoft Access and ADO interfaces are only available under Windows.

The Developer Edition of Microsoft Office includes a Microsoft Access Runtime Engine for using a Microsoft Access databases without having a Microsoft Access database installed.

Note – StarOffice Base can not import Microsoft Access databases with all the forms, reports and queries but can read and write data.

¹ OpenOffice.org Solutions : http://wiki.services.openoffice.org/wiki/OpenOffice.org_Solutions

Email And Calendar Clients

The standard configuration consists of the core applications: Writer, Calc, Impress, Base, Draw, and Math. The StarOffice 9 Enterprise Edition also includes Mozilla Thunderbird and the Lightning extension for calendaring, scheduling, to-do lists etc.. It supports a number of Calendaring servers such as Sun Java Calendar Server or the Google Calendar but currently not Microsoft Exchange. However this is typically not an issue because the User CAL of the Microsoft Exchange Server (all versions through version 2003) includes a Microsoft Outlook license . Per your request, Microsoft will send you an Outlook installation CD. Generally a migration of the email client is not required. The setup application automatically recognizes your default e-mail client and no extra configuration is required.

Mozilla Thunderbird is the most popular open source mail client and based of the Mozilla framework, the same framework the Firefox browser uses. Mozilla Thunderbird is platform independent and is available in dozens of languages.

For OpenOffice.org users, Mozilla Thunderbird and the Lightning extension can be obtained via a free download at:

<http://www.mozillamessaging.com/en-US/thunderbird/>

<http://www.mozilla.org/projects/calendar/lightning/>

Notes about the Document File Format

The dominant document format for Office documents is still the Microsoft Office 97/2000/XP/2003 file format, meaning many documents are preserved in a file format that is controlled by a single vendor. By contrast, OOo/SO use the OpenDocument (ODF) format which is openly documented and standardized by the ISO standardization committee. The new Microsoft Office 2007 file format uses a similar strategy as OpenDocument, and uses a ZIP compressed XML files. The identical architectural approaches does not imply a compatibility of both formats. In fact they are incompatible. The reason is due to fundamental different design principals. The design goals were vendor independent, compatible with the Office suite, accessible for developers, usage of existing standards, and extensible and clear structure.

Microsoft's new Office file format Office Open XML (OOXML) has just one design goal, the compatibility with exclusively MS Office (and not other applications), and this has the consequence of making the standard too complicated to support. A telling indicator is the size of the specification. The ODF specification has a size of 1500 page which is significant lower than the 6000 page of he OOXML specification.

Using ODF As Default Document Format

There are good reasons why many governments, public authorities and large enterprises support the ODF document format. ODF is widely supported and MS Office 2007 will also natively support it with service pack 2. For older MS Office releases Sun provides the ODF plug-in, a solution that loads and saves ODF documents for while working in Microsoft Office.

ODF is also ideal for communication with external companies. For users or organizations that cannot read the ODF format, OpenOffice.org and StarOffice can also send emails as PDF and or Microsoft Office documents.

Sharing And Converting Documents

The OpenOffice.org or StarOffice import and export filters are sufficient to work with the vast majority of Microsoft Office documents. Exchanging documents with Microsoft Office users works usually without any issues, however documents may look slightly different after the conversion. Simple macros in MS Excel documents can work in StarOffice Calc; Word and complex Excel macros will not work, but would need a manual workaround.

Microsoft Office features that might require attention

Application	Feature
Microsoft Word	OLE objects (on Solaris/Linux/Mac)
	Indexes
Microsoft Excel	OLE objects (on Solaris/Linux/Mac)
	Pivot Tables (called Data Pilot in Calc)
	Few chart types
Microsoft PowerPoint	OLE objects (on Solaris/Linux/Mac)

Application	Feature
	Certain multimedia effects

Sharing With Microsoft Office 2007 Users

Microsoft Office 2007 introduces a set of new features but note that most of them are not only incompatible with StarOffice 9 but also with older Microsoft Office versions. So there is a good possibility that you'll encounter these unsupported features in documents, and users without a Microsoft Office 2007 either won't be able to read these documents because of the new file format or if they can read it, can only partly edit the document due to the unsupported features problems.

Microsoft implemented a compatibility mode in Microsoft Office 2007 which warns these users of the new features and also allows them to save their files in the Microsoft Office 97-2003 file format. This avoids most of the issues but the compatibility mode is not activated by default.

Scenarios and Case Studies

Scenario 1: Migrating The Entire Company At Once

This scenario is best suited for small and medium-sized companies with approximately less than 1000 employees. The following milestones and tasks represent a possible migration timeline:

1. **Start piloting OpenOffice.org or StarOffice:** Define a group of users to participate in a the pilot.
2. **Start analyzing documents and IT environment :**
 - Use the Professional Analysis Wizard to determine what documents need converting, how long the document conversion, and what, if any, migration issues you will encounter when you convert the documents. For OOo users without a Sun services contract, this has to be done manually.
 - Use questionnaires to identify the applications which either depend on or provide interfaces to Microsoft Office.
3. **Kick off migration.** This milestone officially marks the beginning of your migration process and includes the following tasks:
 - Install OOo/SO on the server and clients. OpenOffice.org, StarOffice and Microsoft Office can coexist on the same system.
 - Organize employees in teams and train them to use OOo/SO and how to verify and correct any problems in the converted documents and templates. Training should also address working in a mixed office environment.
4. **Start converting files that belong to the company or business units.** At this point, OpenOffice.org or StarOffice have been installed on all relevant workstations in your company.
5. **Start auditing converted files.** At this point, all critical templates have been converted and all users have completed their training. Users can now start to verify the fidelity of the converted files. Users who are not involved in this process can start to convert their own documents.
6. **Start using OpenOffice.org or StarOffice for all new files.** At this point, all critical files have been converted, audited, and cleaned up. Users can create new documents in OpenDocument Format (ODF) in either OpenOffice.org or StarOffice. From this point forward, Microsoft Office should only be used to print and to edit existing Microsoft Office documents.
7. **Confirm the “sunset date” for Microsoft Office.** At this point, all company and workgroup documents should be converted to ODF, all mission-critical systems should be running within a OpenOffice.org environment, and users should be proficient in using the OOo/SO productivity tools. However, it is a good idea to remind users when Microsoft Office will be removed from their systems, so they have a clear idea of how much longer they have to finish converting and auditing their own documents if necessary.
8. **Remove Microsoft Office.** At this point, everyone is using either OpenOffice.org or StarOffice . The migration of all documents and business solutions should be finished. You can now remove Microsoft Office from your company's network and clients. However, in

case there are delays in converting or reengineering mission-critical files, you should keep at least one Microsoft Office installation.

Scenario 2: Migrating The Company Workgroup By Workgroup

In general, this scenario differs from the first scenario in that the milestones are for a workgroup and not for a company. The key difference is to determine the order in which to migrate the individual groups.

1. To limit the challenges of working in a mixed office suite environment, start with departments that do not need to exchange many documents with other departments.
2. Continue with departments that only have to view or print documents from other departments or workgroups. These departments can use the conversion filters in OpenOffice.org or StarOffice to import and view Microsoft Office documents.
3. Finally, migrate departments that need to exchange document-based information with other departments.

Scenario 3: Mixed Office Environments

Mixed environment are where OpenOffice.org, StarOffice and Microsoft Office are used. In such an environment, there are two main ways to share documents, namely passive document sharing or editable document sharing.

Passive Document Sharing

In this scenario, shared documents are used to distribute information and no action is required. For example, the documents are used to distribute information about new corporate policies to employees. Another example of passive document sharing is the distribution of standard contractual terms and conditions to customers and partners.

The best approach in this scenario is to distribute the documents in the common read-only format like PDF. PDF is easy to create and is ideal for brochures, letters, invoices, and forms.

StarOffice 9 introduces a PDF hybrid format, which is a standard PDF file that can be imported, edited and saved in ODF. StarOffice/OpenOffice.org users can load and edit these documents and users can then viewing the documents with a normal PDF viewer.

Editable Document Sharing

In this scenario, recipients can edit the contents of the shared documents, for example to provide feedback or to add more content before the documents are passed to a third party. The main problem in this scenario is that you cannot assume that a third-party recipient of a shared document has StarOffice or OpenOffice.org. Most likely, the common file format in a mixed environment is the Microsoft proprietary file format.

One approach is to make ODF the default format in your company. Standardization makes exchanging, tracking and supporting documents. For this solution, Microsoft Office users would require a parallel installation of OOo/SO or an installation of the ODF Plug-In for Microsoft Office. The ODF Plug-in allows Microsoft Office users to read, edit and save to ODF.

Another approach is to distribute the shared documents in Microsoft Office format, especially if only a small percentage of users work with OpenOffice.org or StarOffice in your company.

The following suggestions can also help you to improve interoperability in a mixed environment:

- Make OpenOffice.org or StarOffice the default office application in groups where users closely collaborate, even if some of the group members are not part of your company. As mentioned above, the ODF Plugin for Microsoft Office enables these users to read and write ODF documents.
- Introduce two main phases to contribute to a document, namely a collaboration phase and an edit phase. In the collaboration phase, a single primary document is shared among users in a mixed office environment. For this phase, you can use either the Microsoft Office format or ODF. For the ODF format it is required to deploy the ODF Plugin for Microsoft Office to all Microsoft Office users. The decision on which format gets used depends on the office suites used by the authors. If the majority of the authors use StarOffice, the ODF format should be used, otherwise the Microsoft Office format.

A Case Study

A large manufacturing company migrates 90% of its workforce to StarOffice with the help of the internal IT department. After the migration, a few installations of Microsoft Office remain so that the finance department can continue to use Excel-based tools and macros and also to ensure compatibility with third-party suppliers and partners as well as customers. The officially supported document formats after the migration are the OpenDocument format for editable documents and the read-only PDF format for the distribution of information. Internally, most of the employees exchange documents in OpenDocument format. The employees that continue to use Microsoft Office tend to be in self-contained teams where the documents are shared in Microsoft Office format.

For collaboration efforts between teams that use different office suites, the Microsoft Office format is used. The StarOffice teams use the import and export filters in StarOffice to convert the documents.

For external communication, the PDF format is used. If the external recipient also needs to edit the document, the external recipients install the ODF Plugin for Microsoft Office to edit ODF directly while working in Microsoft Office.

Summary

Migrating to OpenOffice.org or StarOffice is easily achievable with good planning, sufficient resources, and skilled project management. The savings of moving to either OpenOffice.org or StarOffice are substantial, up to 80% in licensing costs, no annual fees, no contractual obligations to purchase upgrades. That freedom and flexibility along with the cost savings make it very worthwhile for starting a pilot or evaluation of StarOffice, StarSuite or OpenOffice.org.

For More Information

Documents

- *Administration Guide*, available at <http://documentation.openoffice.org>
- Microsoft Office to StarOffice 9 Comprehensive Migration Guide, available from your Sun sales representative or partner, this
- OpenOffice.org/StarOffice to Microsoft Office Migration Issues and Workarounds, available from Sun Microsystems sales representative or partner.

Links

- Use OpenDocument (ODF) Specification¹ for details on the OpenDocument XML file format.
- api.openoffice.org provides API specifications, samples, Developer's Guide, BASIC Programming Guide and a Software Development Kit
- Use <http://www.oasis-open.org/committees/office> for general information about the OpenDocument (ODF) XML file format.

Contacting Us

For better assistance, send your comments along with any complex documents with serious conversion problems to the following alias :

StarOfficeMigrationFeedback@sun.com

¹ ODF Specification : <http://docs.oasis-open.org/office/v1.1/OS/OpenDocument-v1.1.pdf>