Migration Protocol to LibreOffice

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Migration Protocol

Project Management

Communications

Analysis
- Documents
- VBA Macros
- Integration

Impact Test
- Bug Fixes
- Compatibility
- Interoperab.

Training
- Trainers
- End Users
- Third Parties

Deployment
- Long Term Supported Software

Support
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Evolution
- New Feature Development
- Integration
Migration ≠ Replacement
Migration = Change
The secret of change is to focus all your energy not on fighting the old but on building the new

Socrates
Resistance to Change

The Kübler-Ross change curve

- **Shock**
  - Surprise or shock at the event

- **Denial**
  - Disbelief; looking for evidence that it isn’t true

- **Frustration**
  - Recognition that things are different; sometimes angry

- **Depression**
  - Low mood; lacking in energy

- **Decision**
  - Learning how to work in the new situation; feeling more positive

- **Experiment**
  - Initial engagement with the new situation

- **Integration**
  - Changes integrated; a renewed individual

Image: UK Cabinet Office, Internal Communications
Types of Resistance to Change

Types of Resistance

Verbal
- Formalism
- Threats
- Arguing
- Rumors
- Inattentiveness
- Ridiculing
- Jokes
- Sick Days
- Incomplete Work
- Silence

Behavioral
- Disruption
- Forming Factions
- Lethargy
- Apathy

Active Fight
- Forming Factions
- Threats
- Arguing

Passive Flight
- Incomplete Work
- Sick Days
- Lethargy

Source: Doppler and Lauterburg
Manage Resistance to Change

Emotional Adaptation of Kubler-Ross Change Curve

- Unawareness
  - Immobile
  - Content/Passive
- Awareness
  - Shock & denial
  - Tense/Stressed/Anxious
- Understanding
  - Anger/frustration
  - Fear
  - Resisting changes
  - Feeling undermined
  - Depression
- Buy-in
  - Suspicious to Trusting
  - Refining; Involved
- Effectiveness
  - Acceptance
  - Obtaining full benefit

- Present
- Transition
- Future

Present: Unawareness
Transition: Awareness, Understanding, Buy-in
Future: Effectiveness

Morale:
- Shock & denial
- Tense/Stressed/Anxious
- Depression
- Resisting changes
- Feeding undermined
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- Acceptance
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Trainers

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Third Parties

Third Parties
Real Issues

- Technical
  - Management of new document formats
  - Conversion of documents to the standard format
  - Learning curve for the basic rules of interoperability
- Psychological
  - Learn a completely new office suite after 20 years
  - Resistance to change and lack of motivation
  - If it is free then there is a hidden trap
False Issues

- Key features are missing
- Some features are in the wrong place
- The file format is different and not popular
- Opening documents messes up the format
- Free software is for technical people
Strengths

- LibreOffice flexibility in expanding the functionality with PHP/Python extensions and scripts (no macro)
- Possibility of using the same office suite independently from the number of workstations
- Opportunity to train all staff, to standardize computer skills
- Opportunity to reorganize/rationalize the document management process
Technical Strengths

- Open source application with copyleft (MPL) license that guarantees the commitment of the community, and the (obvious) availability of source code
- Ease of customization and creation of automation tools with PHP/Python scripts
- Use of a standard document format (ODF), to ensure interoperability and integration in heterogeneous environments
- Compatibility with all Microsoft formats, both legacy and pseudo-standards
- Complete technological independence from IT vendors
Economic/Financial Strengths

- Lowering licensing fees, freeing financial resources for investments in other areas
- Reduced obsolescence of personal computer platforms
- Flexibility in planning investments
- Managed planning of expenses and investments terms
Process Optimization

- Reorganization of business models (templates)
- Optimization of document creation, management and electronic archiving processes
- Opportunity to discover, enumerate and manage applications developed outside IT management control
- Definition of guidelines for external suppliers for the development or the acquisition of software applications
Protocol > Analysis

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**Project Management**

**Communications**

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Analysis

- Templates/styles used in Documents
- Document Automation (macros)
- Document flow (internal and external)
- Specifications to create documents
- All document interoperability policies
Migration of Macros

1. **MACRO**
   - Microsoft Office

2. **Migration necessary**
   - yes → **Workflow analysis**
   - no → **No migration**

3. **Workflow analysis**
   - Template System?
     - yes → **Template System (letter head, text module)**
     - no → **Web?**
   - Web?
     - yes → **web application**
     - no → **OOo macro?**
   - OOo macro?
     - yes → **Java macro**
     - no → **General use?**
   - General use?
     - yes → **Macro in shared library**
     - no → **Macro in template**
Document Analysis

- Evaluation of document templates, and opportunities of restructuring and recreating them.
- Evaluation of critical issues related to the conversion of document formats from closed and proprietary to open and standard.
- Analysis of the functions most frequently used, for the personalization of the training program.
Organization Analysis

- Document production
- Organization of productivity resources
- Document production and exchange processes
- Applications for personal productivity
- Software which interact with personal productivity applications
- Software which produce documents managed with personal productivity applications
StakeHolder

Shareholders
Managers
Power Users
Basic Users

Clients
Suppliers
Partners
Third Parties
Protocol > Project Management
Organization

- Technology Leader
- Department Project Manager
- User clusters by role, task & skills
- In/Out interoperability flows
- Potential obstacles
Preparation

- Identify technology leaders
- Install LibreOffice on their computers
- Conversion of templates and macros
- Start the communication process
- Organization of training of trainers
- Preparation of support material
Organization Check

- User clusters based on technical skills and psychosocial characteristics
- Main contacts within the various operating units
- Technology leaders (typically, recognized "geeks")
- Interchange relationships within the company
- Interchange relationships outside the company
Project Management

- Definition of the migration strategy
- Splitting process into tasks and sub-projects
- Planning
- Training, project marketing, service, support, installation, development, etc.
- Process re-engineering inside company units
- Assessment of TCO and ROI
Migration of Documents/Templates

- Opportunity to reorganize templates
- Review of document management procedures
- Archiving of read-only documents
- Definition of procedures to create “interoperable” documents
- Conversion of “live” documents, often by mean of rebuilding them according to best practices
Kick Off

- Meeting Technology Leader
- Presentation of LibreOffice to Tech Leader
- Conversion of Document and Style Templates
- Communication Kick Off
- Training the Trainers (who will train employees)
- Production of Document Masters
Protocol > Communication

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Communication

- **KEY STEP (NOT TO BE MISSED)**
- Managers must be involved in communications
- "technology leaders" must learn to communicate
- Internal marketing (intranet, email, pin boards)
- “motivational” end user training
Communication Strategy

- Start with internal communications
- Involve immediately politicians/top managers
- Officially announce the migration project
- Involve "technology leaders"
- Create a website/blog and publish on social media
- Publish all documents in a transparent way
Internal Marketing

- Ongoing project communications
- Internal portal (project status, online support, tickets, documentation, downloads, forms for training courses, self-evaluation forms)
- Collection of all articles published on online and offline media, and dissemination on social media
- Specific informations and materials about LibreOffice and the standard Open Document Format
- Tips and tricks, and suggestions
Protocol > Impact Test

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Documents
Impact Test

- Significant and meaningful group of users
- Pointing out critical issues and potential obstacles
- Analysis of all document productions process
- Evaluation of migration risks
- Definition of pre-requisites for executive project
- Potential scenarios and financial evaluation
Technology Leaders

- They are the unofficial but authoritative reference for technology inside the company
- They are technology opinion leaders for their colleagues
- They must be the first evangelists of the new personal productivity tools
- Focused and personalized training, with events to involve and motivate
Protocol > Training

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Training

- Basic training for all users
- Advanced training for technology leaders and power users
- Motivational training for all managers and technology leaders
- Technical training for technology leaders and technical support staff
- Motivational training for users, focused on document standards and interoperability
Training

- Training of trainers
  - Basic, Intermediate and Advanced
- User training
  - Basic training on Writer and Calc
  - Focused training on Impress and Draw
  - Advanced training on demand
Training Protocol

1. Conducting Needs Assessment
   - Organizational Analysis
   - Person Analysis
   - Task Analysis

2. Ensuring Employees’ Readiness for Training
   - Attitudes & Motivation
   - Basic Skills

3. Creating a Learning Environment
   - Learning Objectives
   - Meaningful Material
   - Practice
   - Feedback
   - Community of Learning
   - Modeling
   - Program Administration

4. Ensuring Transfer of Training
   - Self-Management
   - Peer and Manager Support

5. Developing an Evaluation Plan
   - Ident. Learn. Outcomes
   - Choose Evaluation Design
   - Plan Cost-Benefit Analysis

6. Selecting Training Method
   - Traditional
   - E-learning

7. Monitoring an Evaluating the Program
   - Conduct Evaluation
   - Make Changes to Improve the Program

Adapted from the Introduction to Employee Training and Development by Raymond Noe (2004)
Protocol > Deployment

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Communications
Deployment

- Organize trainings
- Install LibreOffice during the training session
- Handle each user the LibreOffice Welcome Kit
- Present first level internal support
- Immediately update the document flow
LibreOffice available versions

- Vanilla
  - Installer for Linux, MacOS and Windows
  - Installation of the entire package
- LTS with incremental updates
  - Provided by different ecosystem members
  - Configurable MSI with MSP updates
LibreOffice Fresh vs Still

**LibreOffice Fresh**
- Individual deployment
- Mostly unsupported

**LibreOffice Still (LTS option available)**
- Enterprise deployment
- Based on professional support provided by certified individuals
  - Development, migration, training

**Target Users and Deployments**
- Early Adopters
  - Individuals
- Deployment for Production
  - Professionals, SMBs and Enterprises
Protocol > Support

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Technical Support

- Support for users facing technical issues during the migration process
- L0 support
  - Intranet (documentation, how to, FAQ, news)
  - Collect and share information amongst users
- L1 and L2 technical support
- L3 external support (certified)
Support Structure

- Intranet with Documents and Manuals
- Technology Leaders for First Aid Support
- L1/L2 Internal Support
- L3 Certified External Support for Bugs
- Interaction with LibreOffice community
- Bug Reporting on Bugzilla
Protocol > Evolution

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Interoperability?

- We learn to create nice docs for printing
- We do not learn to create interoperable docs
- We use fancy formatting and fonts
- We do not respect the semantics of XML tags
- … but we complain if the doc is messed up
Learning Interoperability

- Use true open document standards
- Use free fonts available on any platform
- Create "interoperable" documents
- ... good to open with a different software
- ... good to open with a different OS
Interoperability > Applications

- Use interoperable data formats
- Teach users how to use the product in an interoperable way
- Include document templates and defaults that encourage interoperability
- Allow validation of interoperable documents
Interoperability > Data Formats

- Separation of content, attributes, behaviours and metadata
- Reuse of existing, established open standards
- Thorough review of document formats
- Use of standard components
Interoperability > Organization

- Adopt of a single standard open document format
- Adopt applications with proven conformance to that open document standard format
- Teach users how to create interoperable documents
Interoperability > Users

- Capture information at the highest level
- Add document metadata
- Provide annotations for accessibility
- Use templates and styles
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