

Microsoft Office Migration Case Study



Microsoft Office Migration Sets the Stage for Conversion to Outlook

The Problem – *Migrate to Office 2003*

Before they could move from Lotus Notes to Microsoft Outlook as their e-mail client, a large law firm, with offices located in major cities around the world, had to upgrade their Microsoft Office XP environment to Microsoft Office 2003. The challenge was to deliver the MS Office upgrade in a way that allowed for the Outlook mail client to be activated at a later date. The desire to minimize the impact of the new user interface by keeping it similar to the current interface added to the complexity of the upgrade. The impact from significant interfaces with add-on products, and a desire to minimize user disruption added to the complexity of the upgrade.

The Analysis

The firm realized that there was a need to retain personal user settings, logistically deploy to a large number of users, and minimize the potential for compatibility issues. Technical and non-technical factors needed to be measured, and detailed migration plans developed around these factors, in order to significantly reduce the risk of this migration. This was particularly important since MS Office was not only the primary document creation tool used firm-wide, but it had several integration points with 3rd party tools, in addition to major firm-wide customizations to their Word and Excel environment.

The Solution – *Detailed Planning and Approach*

PSC knew that this was not going to be the normal Office 2003 upgrade. Because the core business revolved around Microsoft Office, extreme care had to be taken throughout the project. Particular attention was given to the use of templates and the processes to ensure document compliance in the creation of legal forms & letters. This meant that each office had a set of personalized templates that required verification of compatibility with Word 2003. The 3rd party tools, which included their own customizations, also required upgrades to be compatible with the Office 2003 environment. In addition, integration with the firm's content management system, Interwoven, was imperative. The final challenge was that the distribution of the upgrade needed to be completed with little or no downtime for both the professional and administrative staff.

The approach was based on Microsoft Solutions Framework and Microsoft Operations Framework tailored to suit the specific Office 2003 upgrade purposes. Envisioning and Planning was the key phase that resulted in PSC providing a detailed plan and allowed for the successful execution of an approach that managed the risk of disruption during the change. Activities performed included:

- **Project Vision Scope and Requirements:** Vision, scope and requirements provided a clear direction for the project and set expectations. It was composed of the Business Goals, Vision Statement and Scope Definition in addition to other details around user profiles, solution concepts, and project structure. The top identified risks were also included.
- **Project Timeline and Project Staffing Assessment:** After the scope and requirements were confirmed, an estimate of the project timeline and resources necessary to meet the planned timeframe were developed for the entire project.
- **Assessment of the Office and Integrated Applications:** A high-level assessment of the Office and integrated business application suite was completed to determine potential migration issues. Identification of the current configuration and mapping of the integration points and a review of the business process was used to help in the planning and time estimations of the work to be done.

The PSC approach resulted in a plan that provided a repeatable process for future Microsoft product implementations and management that allowed for a virtually flawless execution of the upgrade.

The Technology

- Microsoft Office Suite

The Benefits

- Minimal impact to end-user prior to moving to Outlook e-mail client from Lotus e-mail client
- Lays the foundation for additional collaborative functionality.



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PSC Group, LLC is an information-technology and professional services consulting firm that specializes in business process architecture and back-end integration. We have extensive experience in the integration of Microsoft products with a variety of applications, processes and systems including ERP, CRM, Portal, and Workflow.

When it comes to information management and control of business processes, PSC can provide you with a competitive advantage through the smart application of technology.

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