Migration Protocol to LibreOffice

M. Latini - I. Vignoli

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
- Bug Fixes
- Compatibility
- Interoperab.

Evolution
- New Feature Development
- Integration
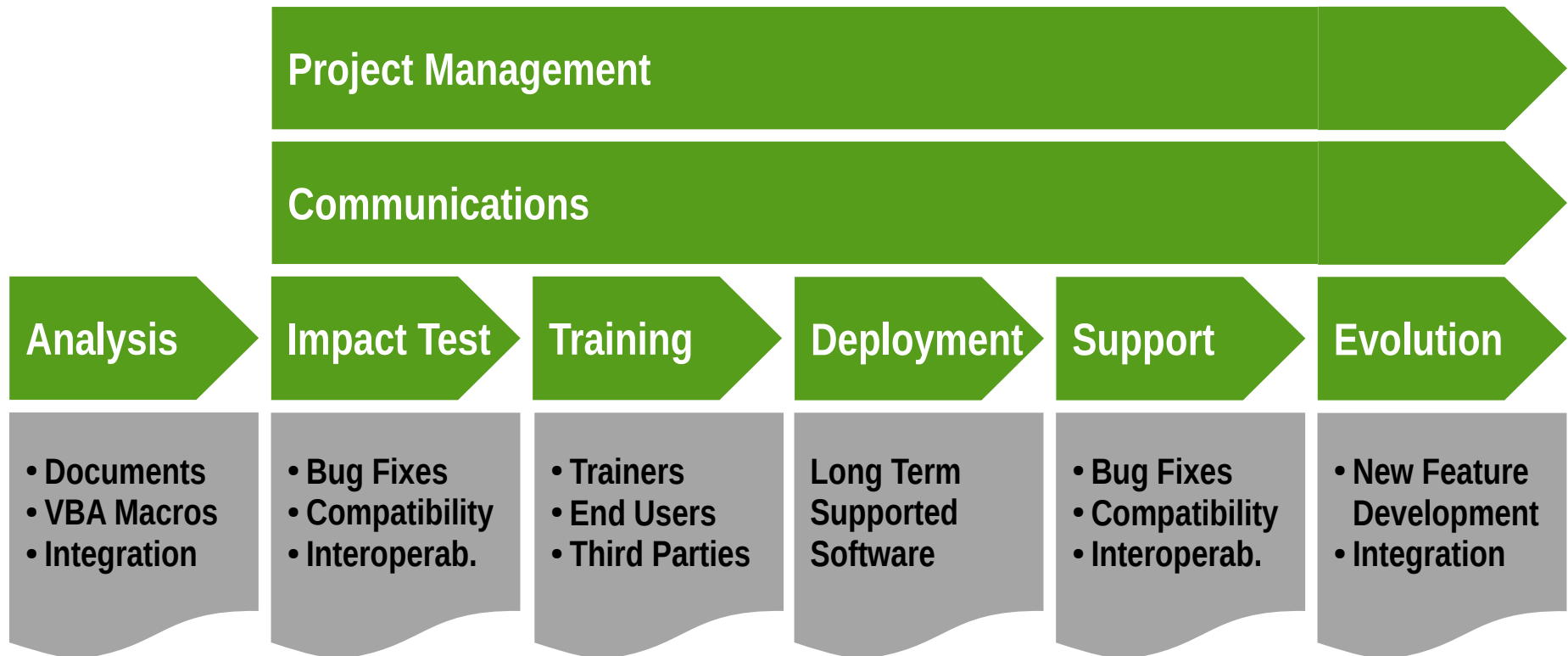
Migration
≠
Replacement

Migration

=

Change
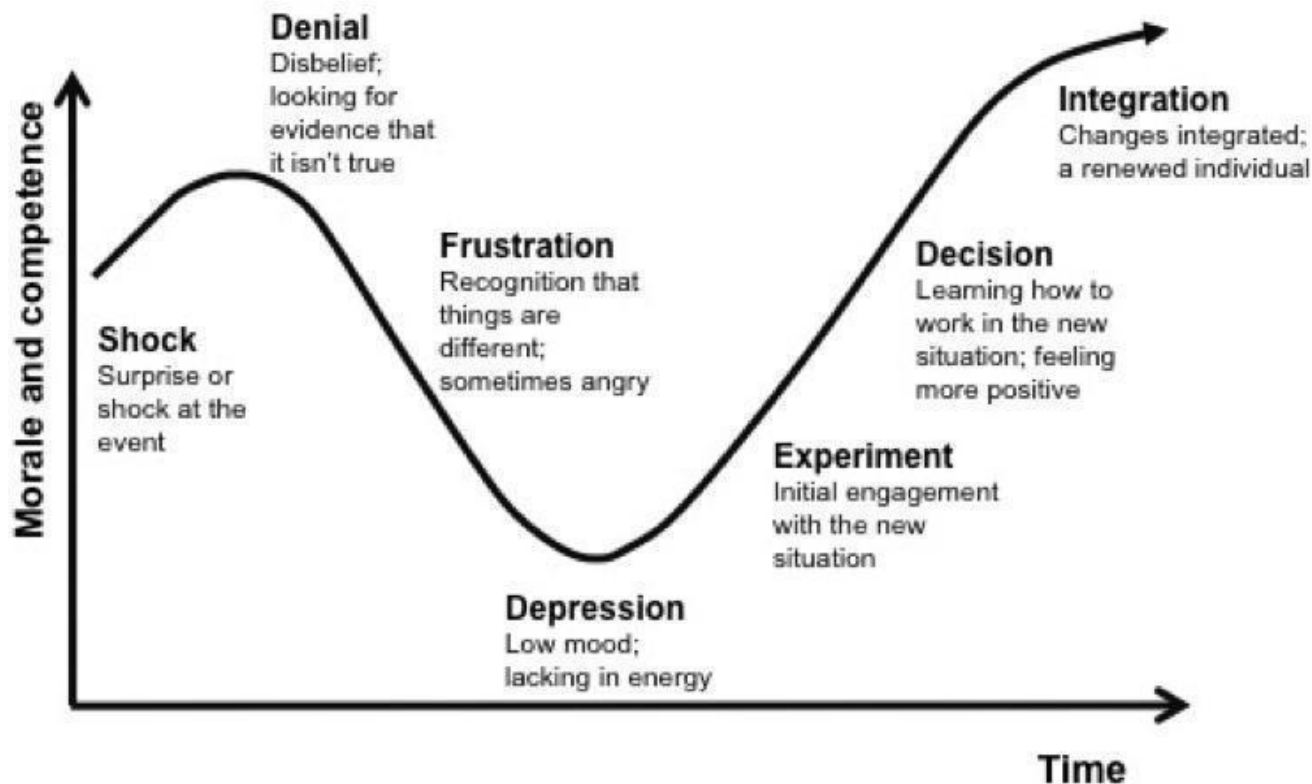
**The secret of change
is to focus all your energy
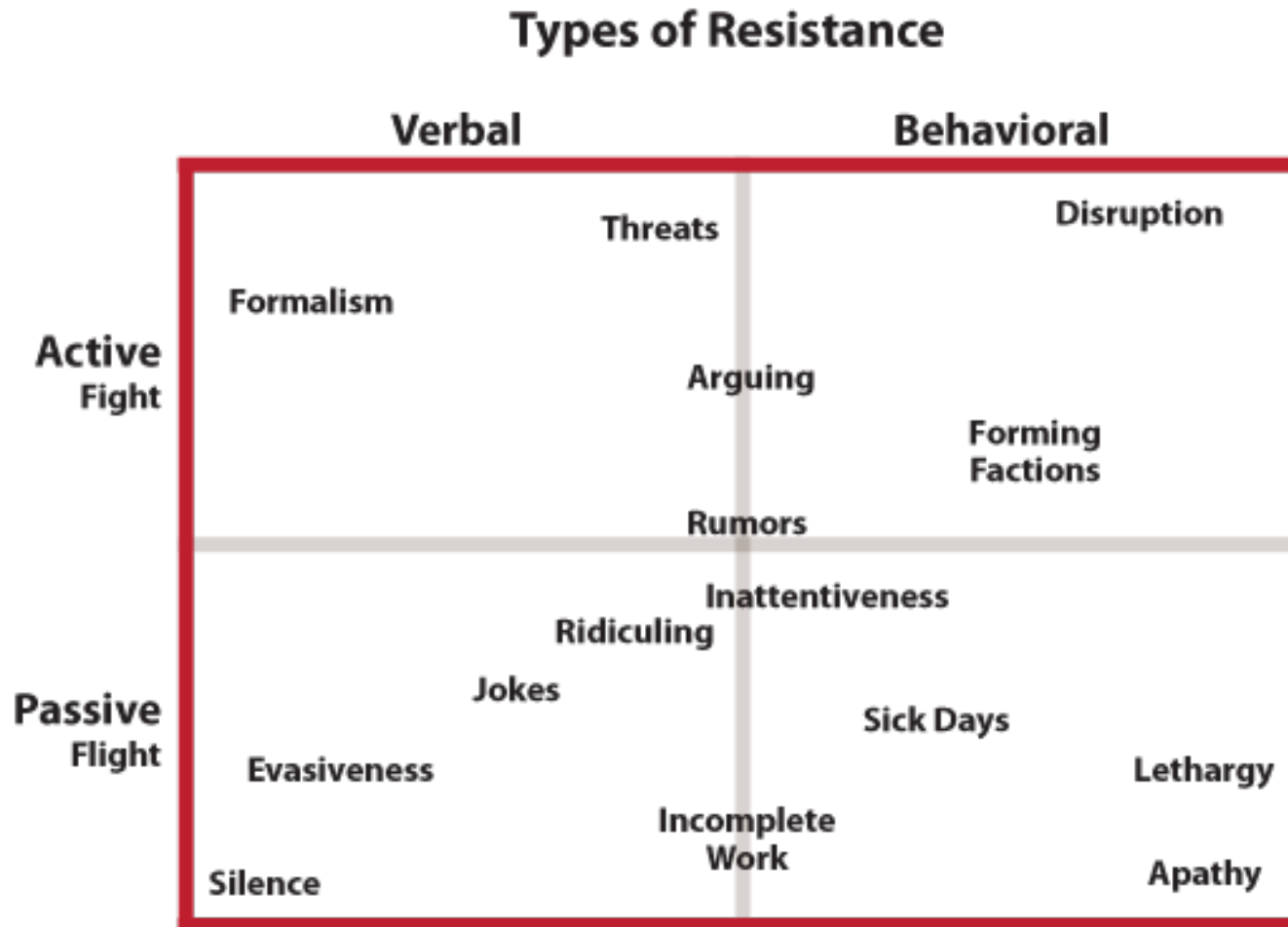not on fighting the old
but on building the new**

Socrates
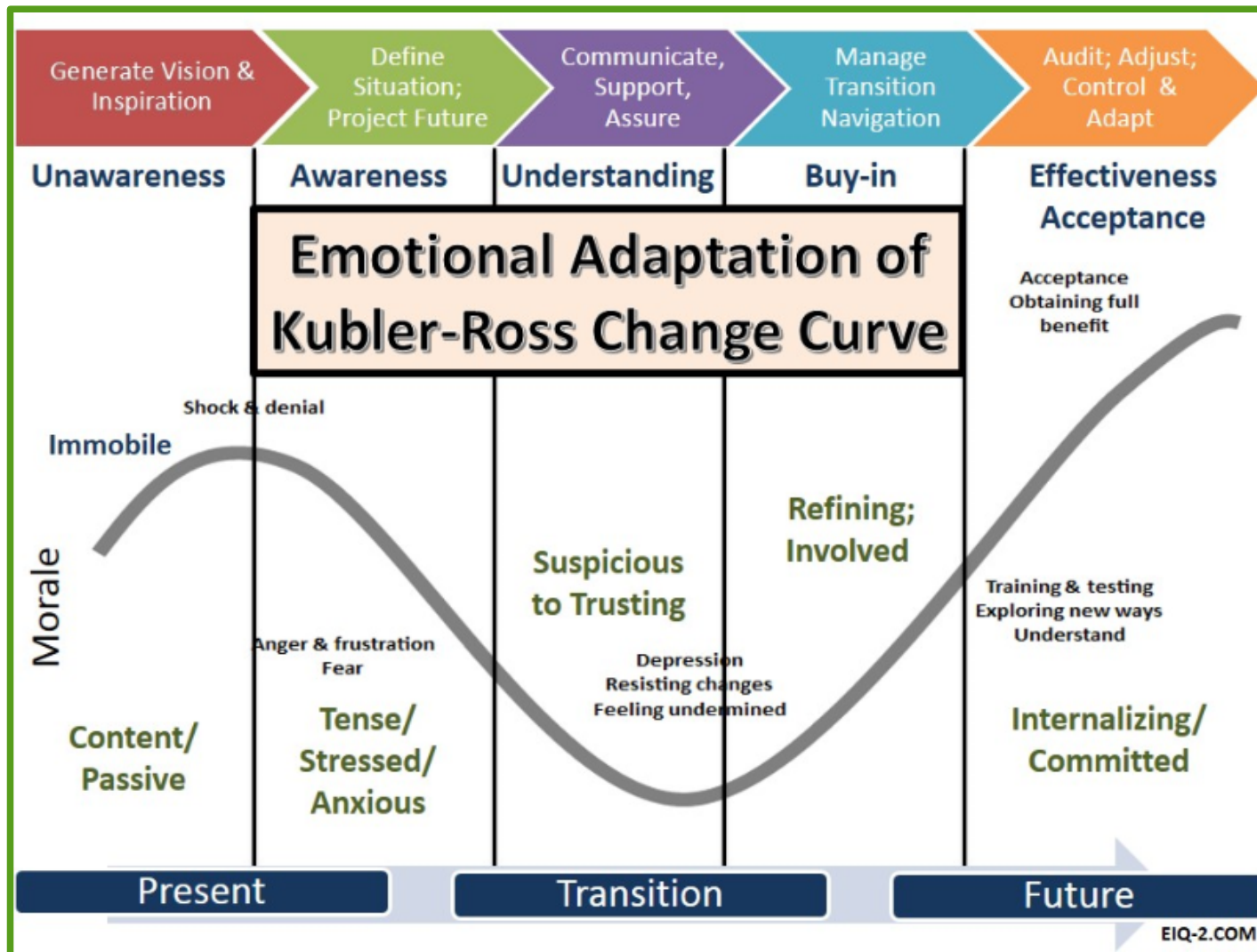
Resistance to Change

The Kübler-Ross change curve

Morale and competence (vertical axis)

Denial
Disbelief; looking for evidence that it isn't true

Integration
Changes integrated; a renewed individual

Frustration
Recognition that things are different; sometimes angry

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

Shock
Surprise or shock at the event

Experiment
Initial engagement with the new situation

Depression
Low mood; lacking in energy

Time (horizontal axis)

Image: UK Cabinet Office, Internal Communications

Types of Resistance to Change

Types of Resistance

	Verbal	**Behavioral**
Active Fight	Formalism, Threats, Arguing	Disruption, Forming Factions
	Rumors	
Passive Flight	Inattentiveness, Ridiculing, Jokes, Evasiveness, Silence	Sick Days, Lethargy, Incomplete Work, Apathy

Source: Doppler and Lauterburg

Manage Resistance to Change
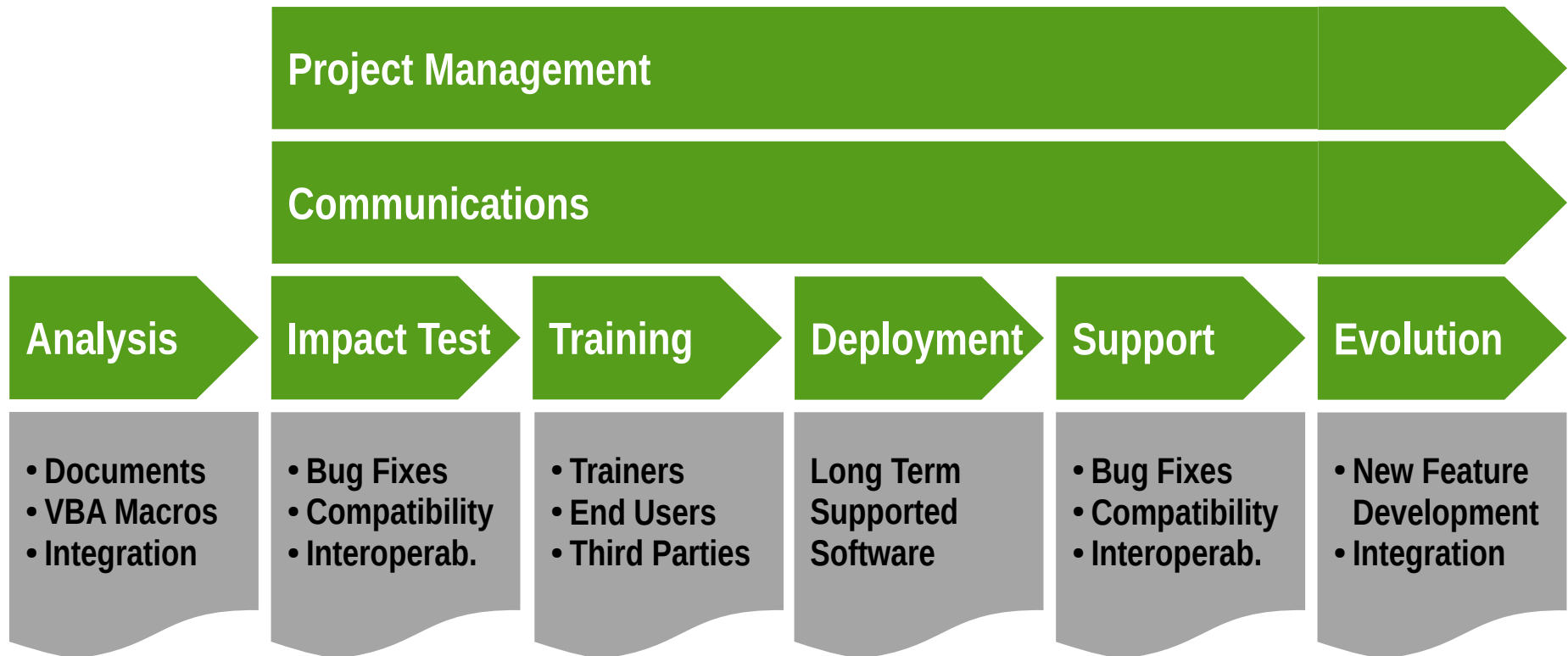
Emotional Adaptation of Kubler-Ross Change Curve

Migration Protocol

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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

- ODF: ISO / IEC 26300 standard, supported by Microsoft Office 2010 (plug-in), 2013 and 2016
- 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
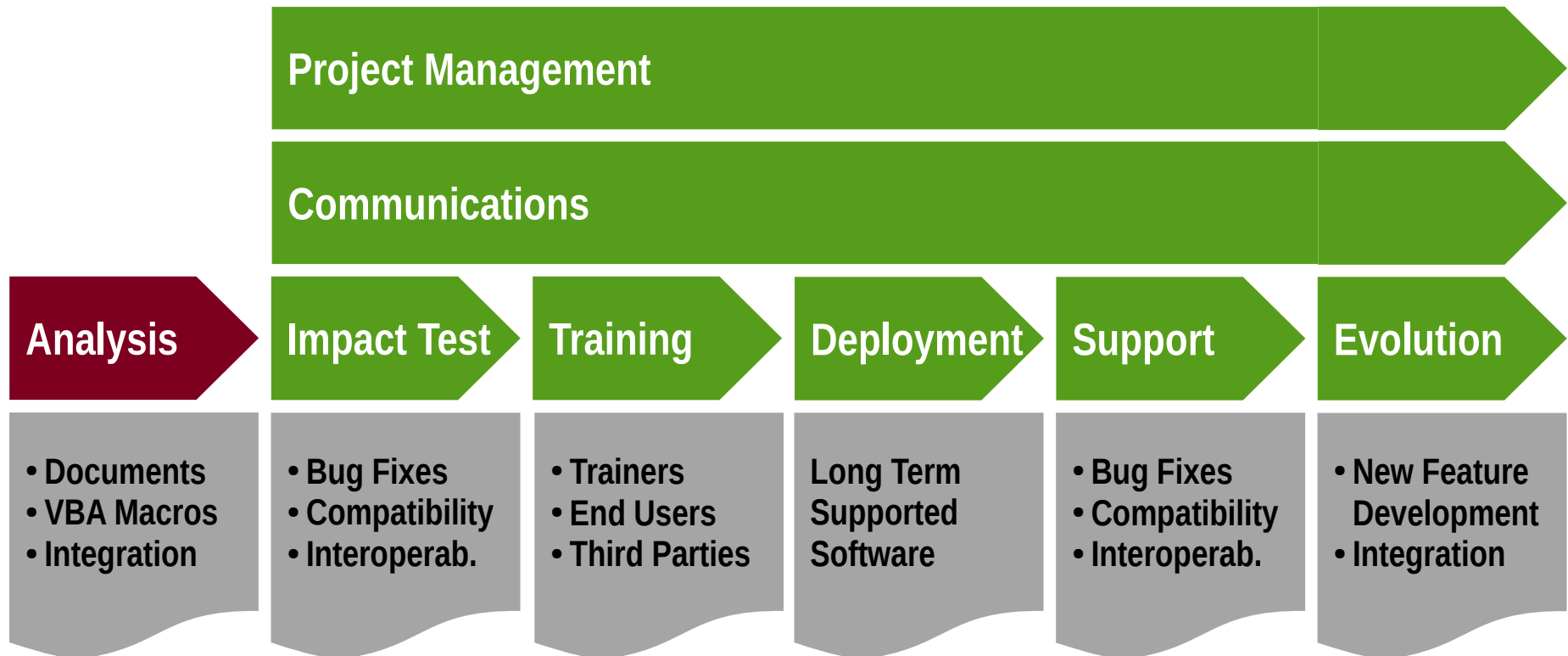- Managed planning of expenses and investments terms

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

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

Documents

Macros
Automation

Styles
Templates

Spreadsheets - Databases
Text Documents - Presentations
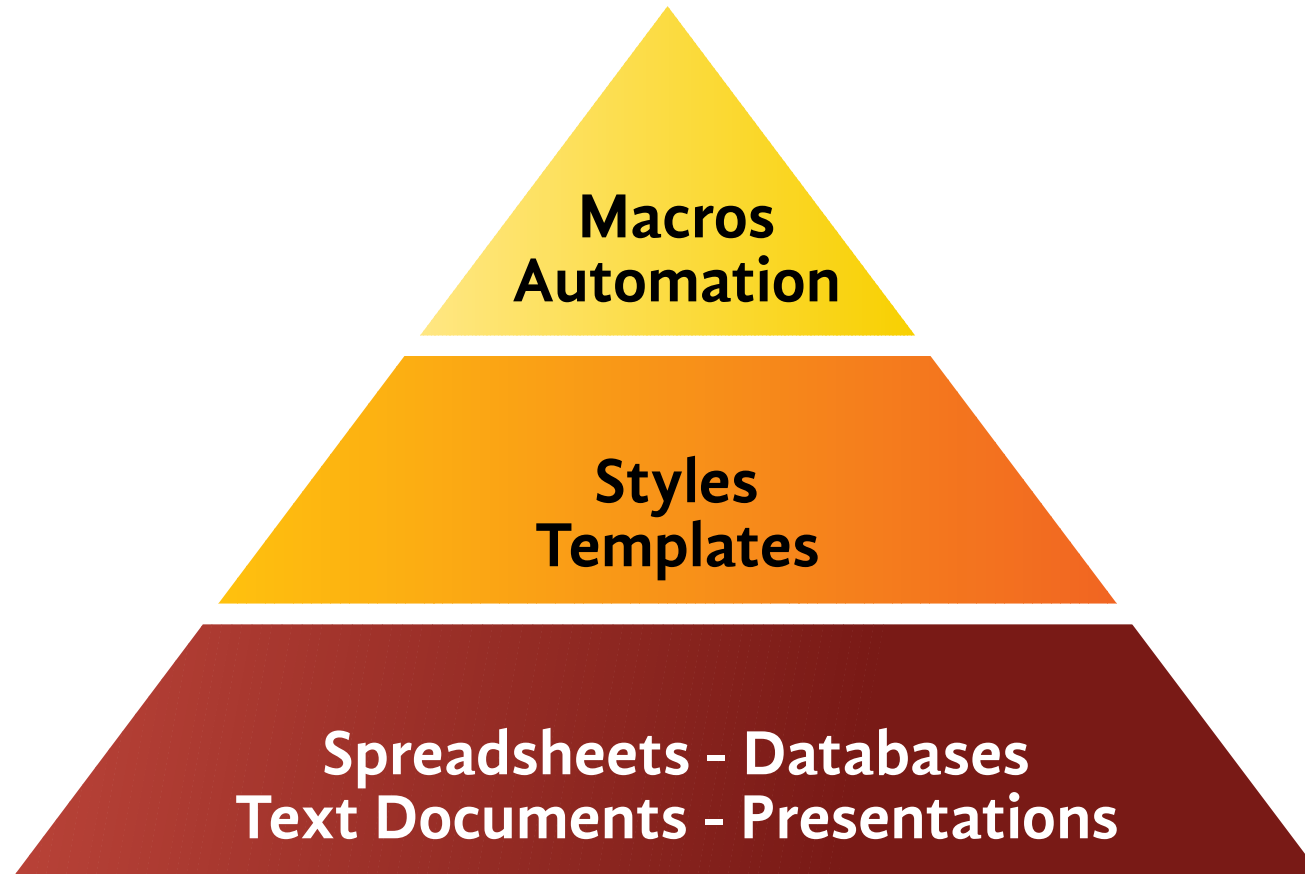
Migration of Macros
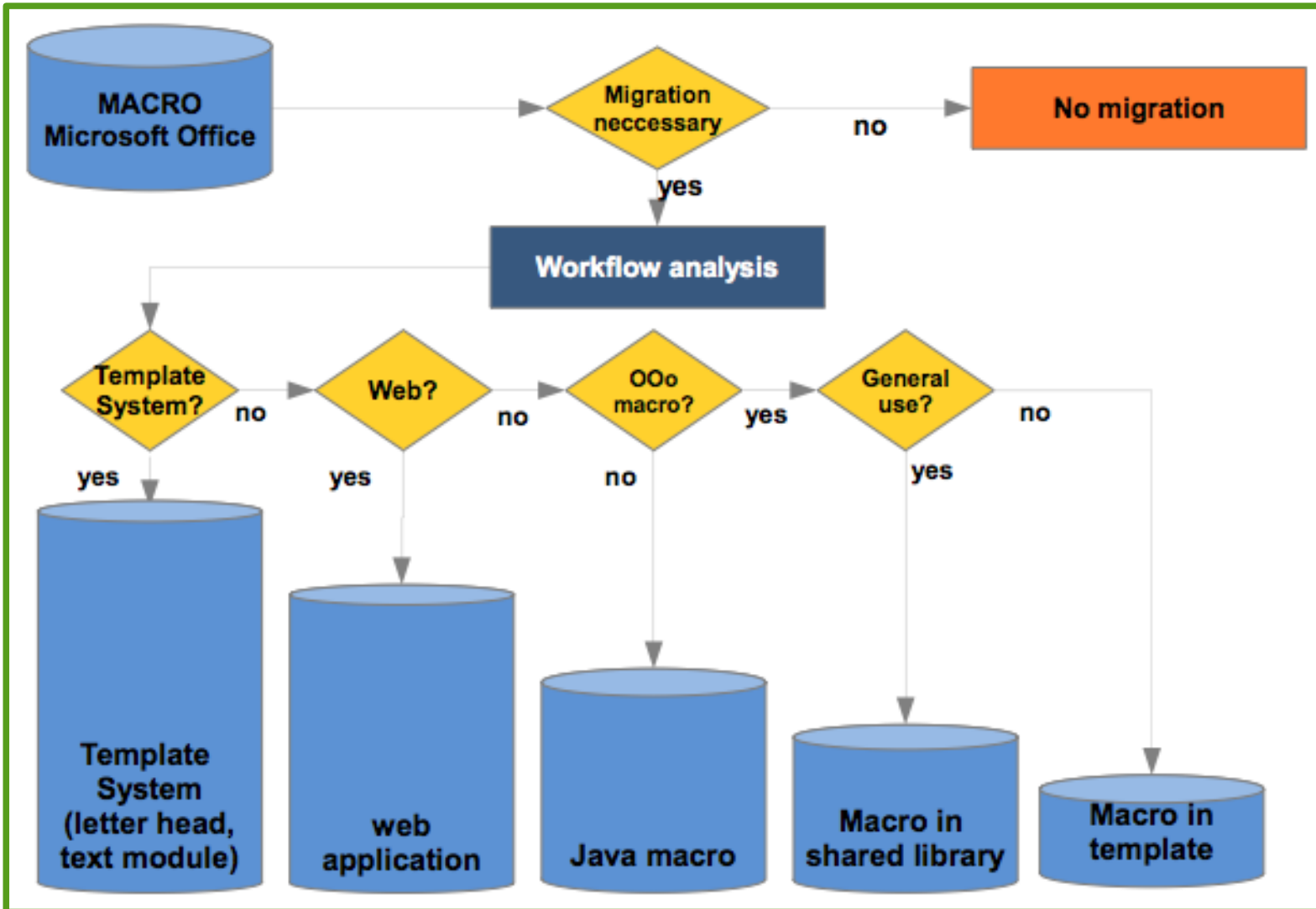
Document Analysis

- 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

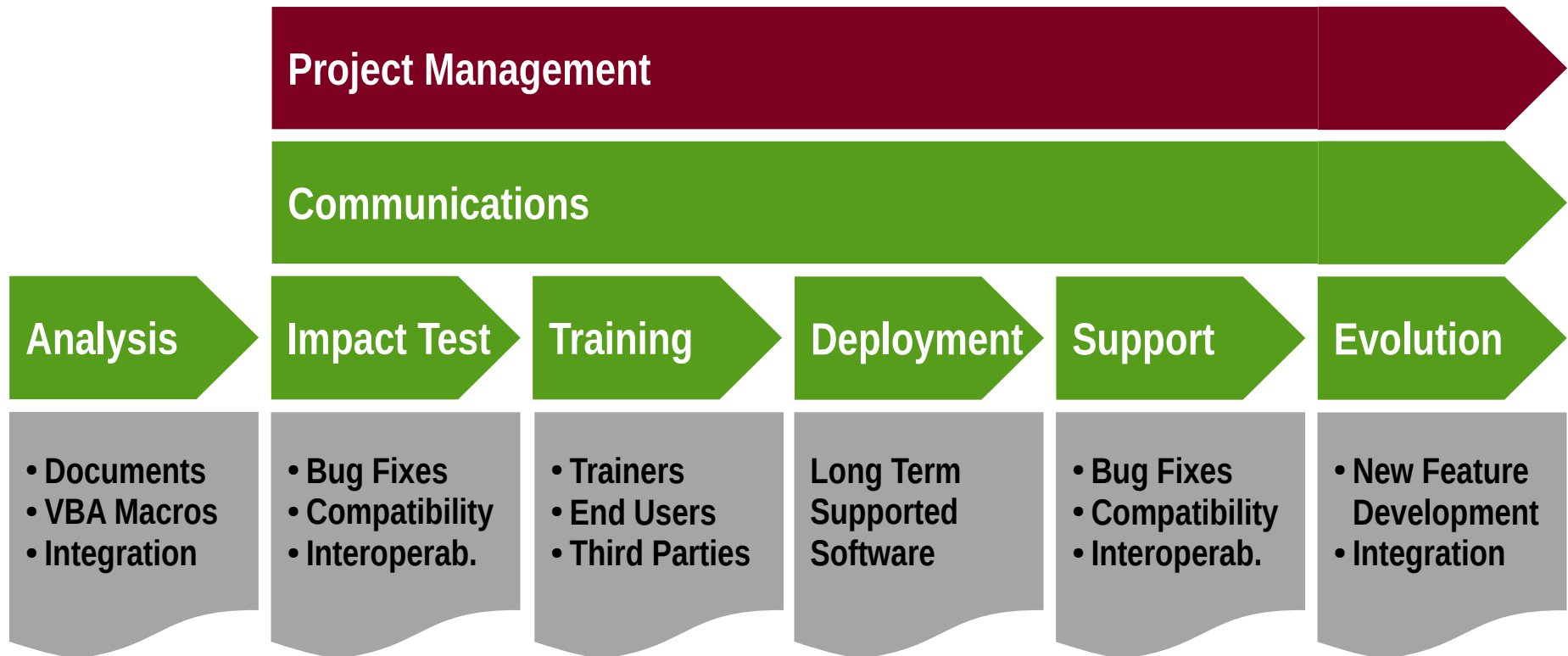Third Parties

Protocol > Project Management

Project Management

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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

Project Management

Communications

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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

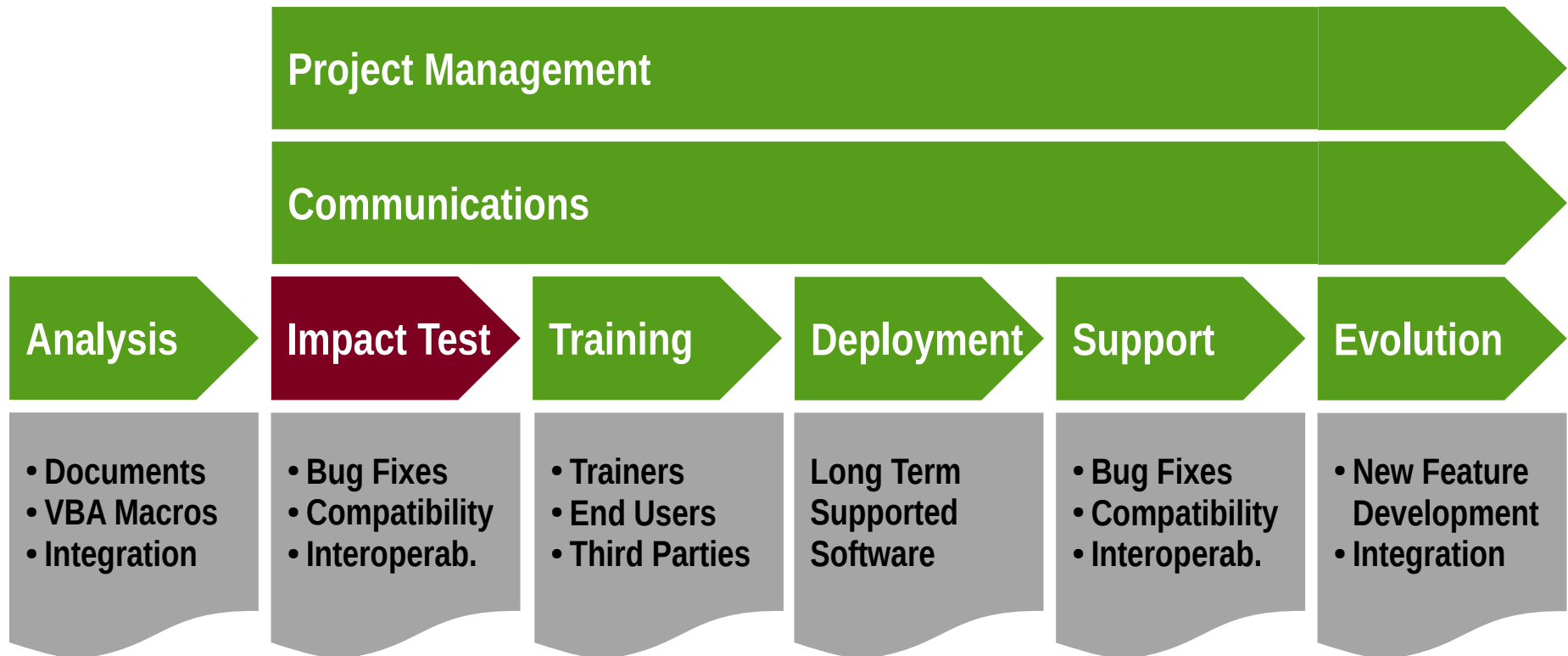- Ongoing project communications
- Internal portal (project status, online support, tickets, documentation, downloads, forms for training courses, self-evaluation forms)
- Collection of all articles published on online and offline media, and dissemination on social media
- Specific informations and materials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

Protocol > Impact Test

Project Management

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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
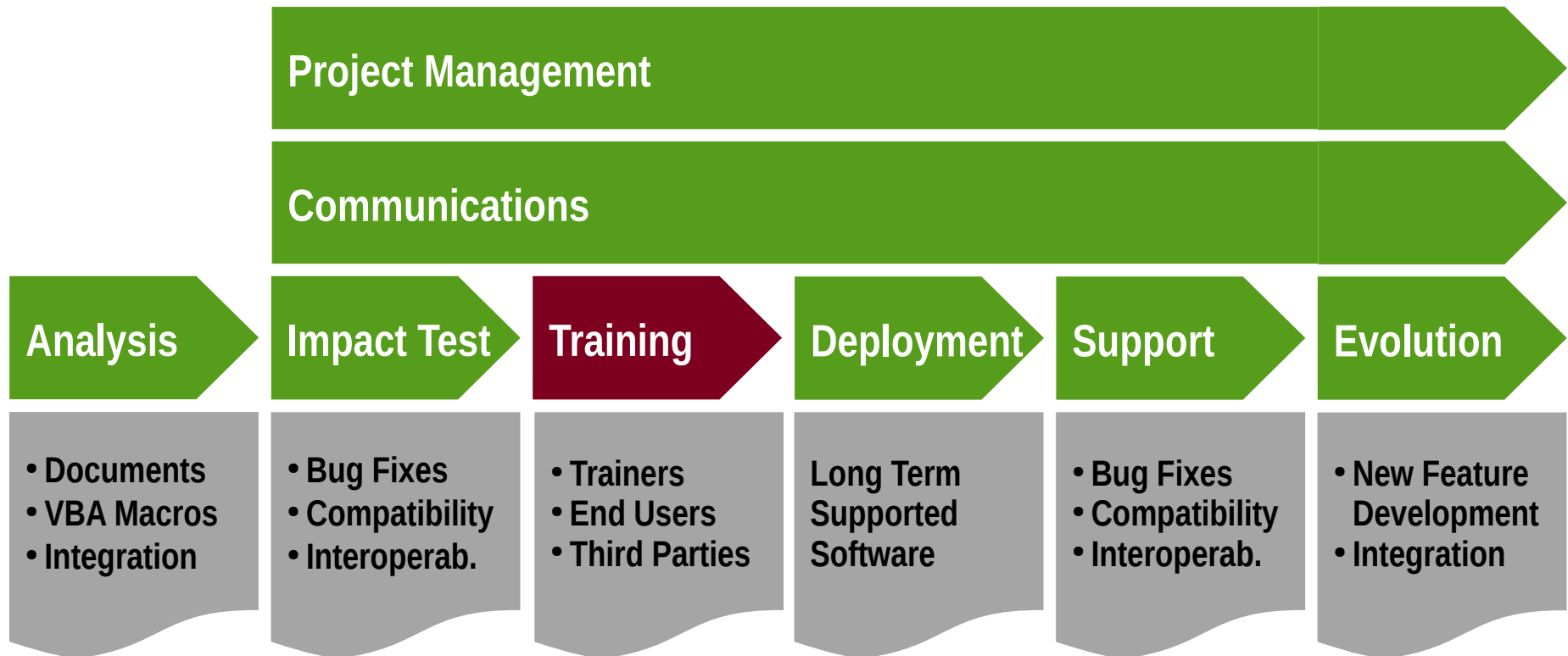- Potential scenarios and financial evaluation

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

Project Management

Communications

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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
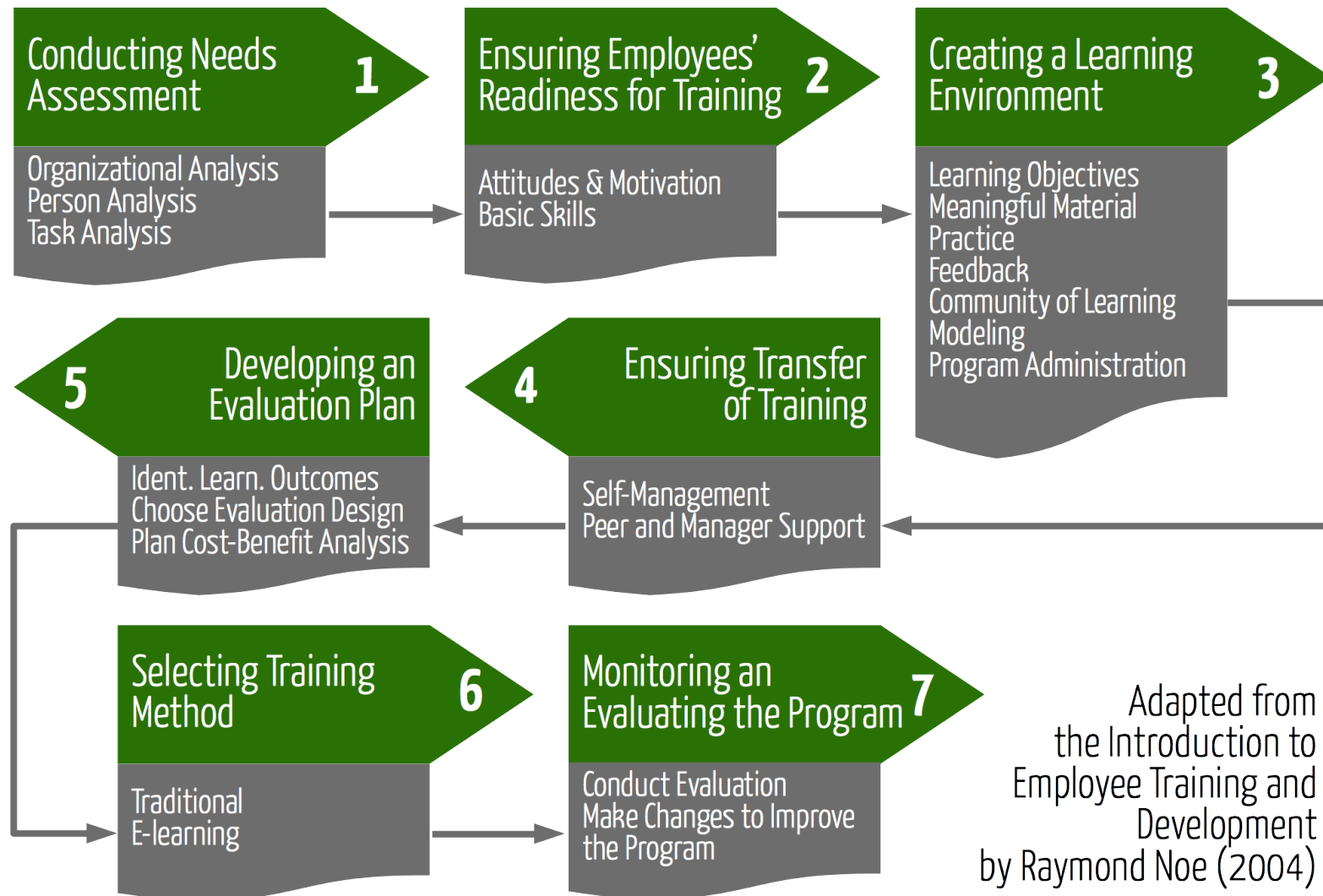- Motivational training for users, focused on document standards and interoperability

Training

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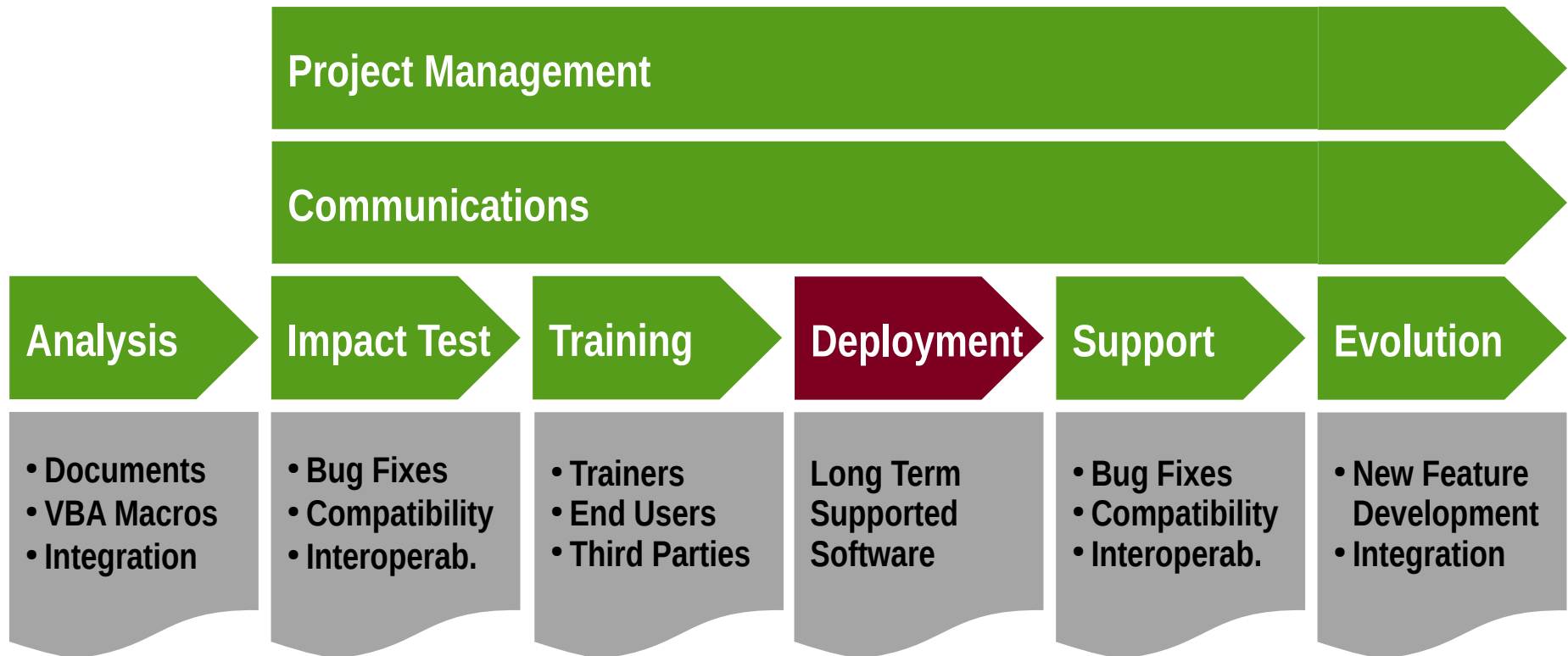 - Focused training on Impress and Draw
  - Advanced training on demand

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

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

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

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

Project Management

Communications

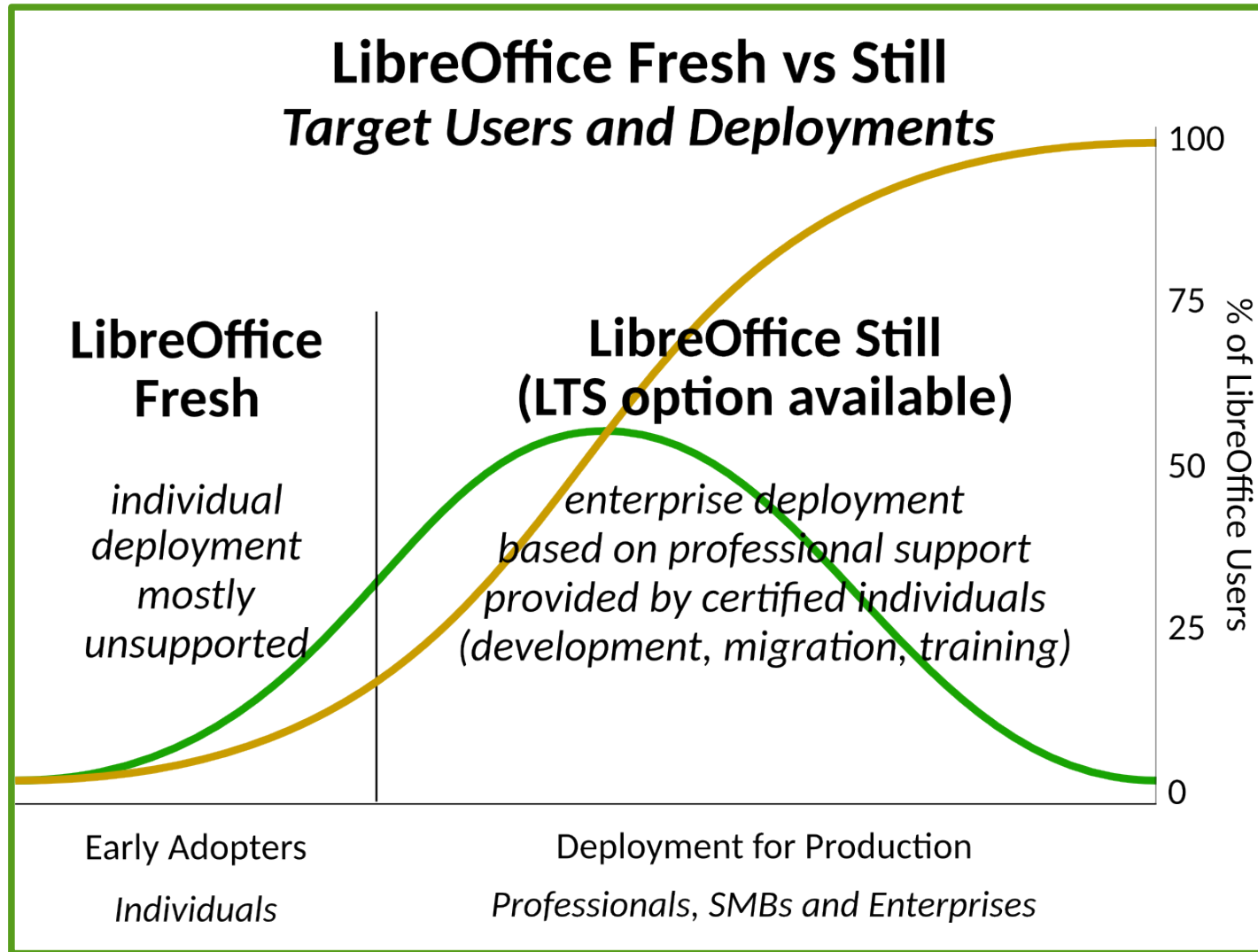| Analysis	Impact Test	Training	Deployment	Support	Evolution
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Deployment

- 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
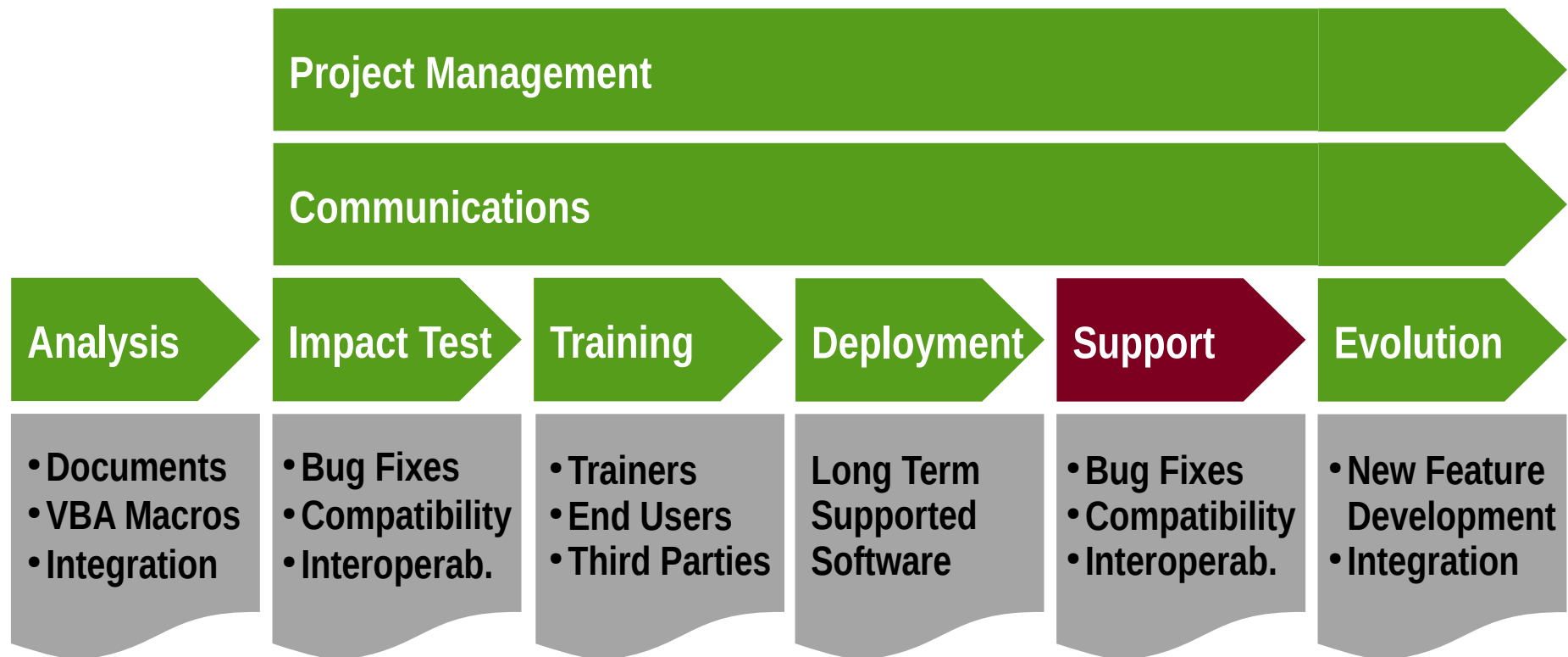
LibreOffice available versions

- **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 vs Still**
Target Users and Deployments

LibreOffice Fresh

individual deployment mostly unsupported

LibreOffice Still (LTS option available)

enterprise deployment based on professional support provided by certified individuals (development, migration, training)

% of LibreOffice Users

100

75

50

25

0

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 Model

Technology Leaders
IT Manager Staff

L1 Internal Support
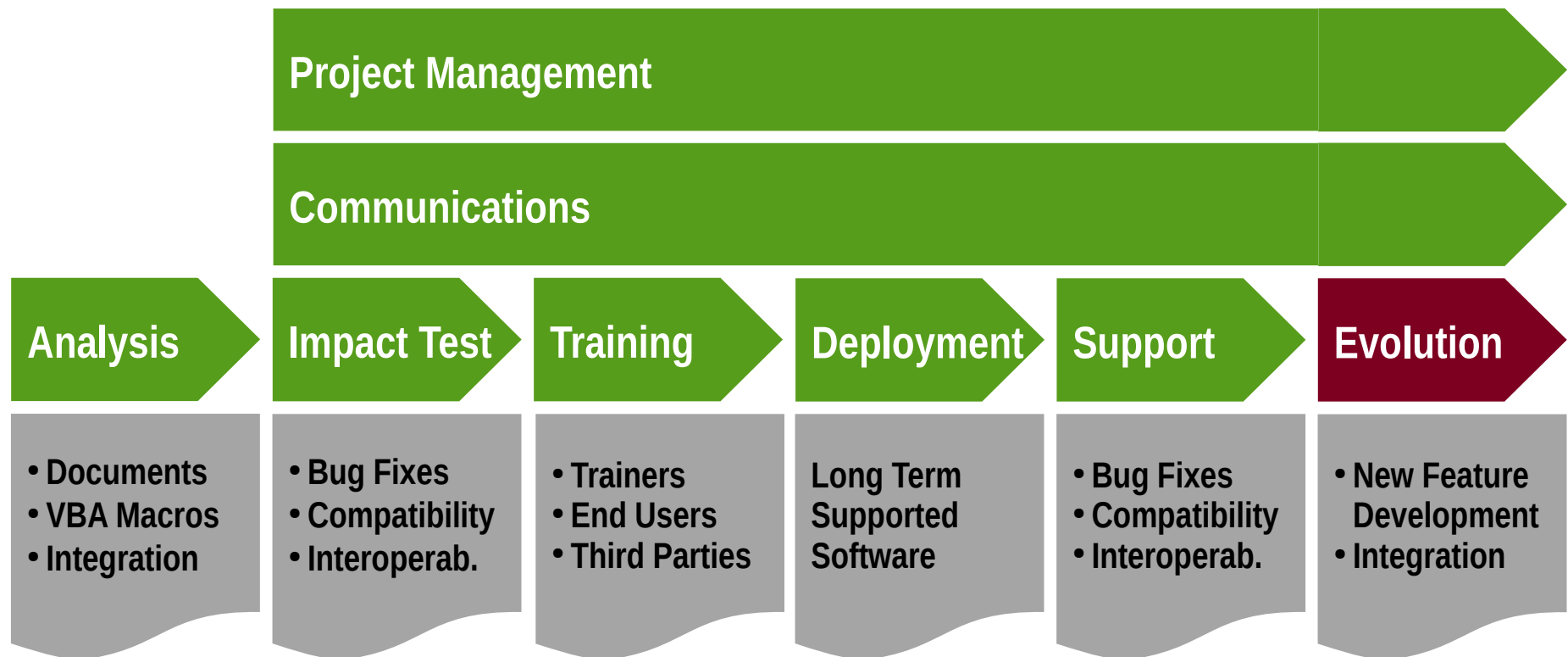L2 Int/Ext Support

Community Resources
L3 External Support
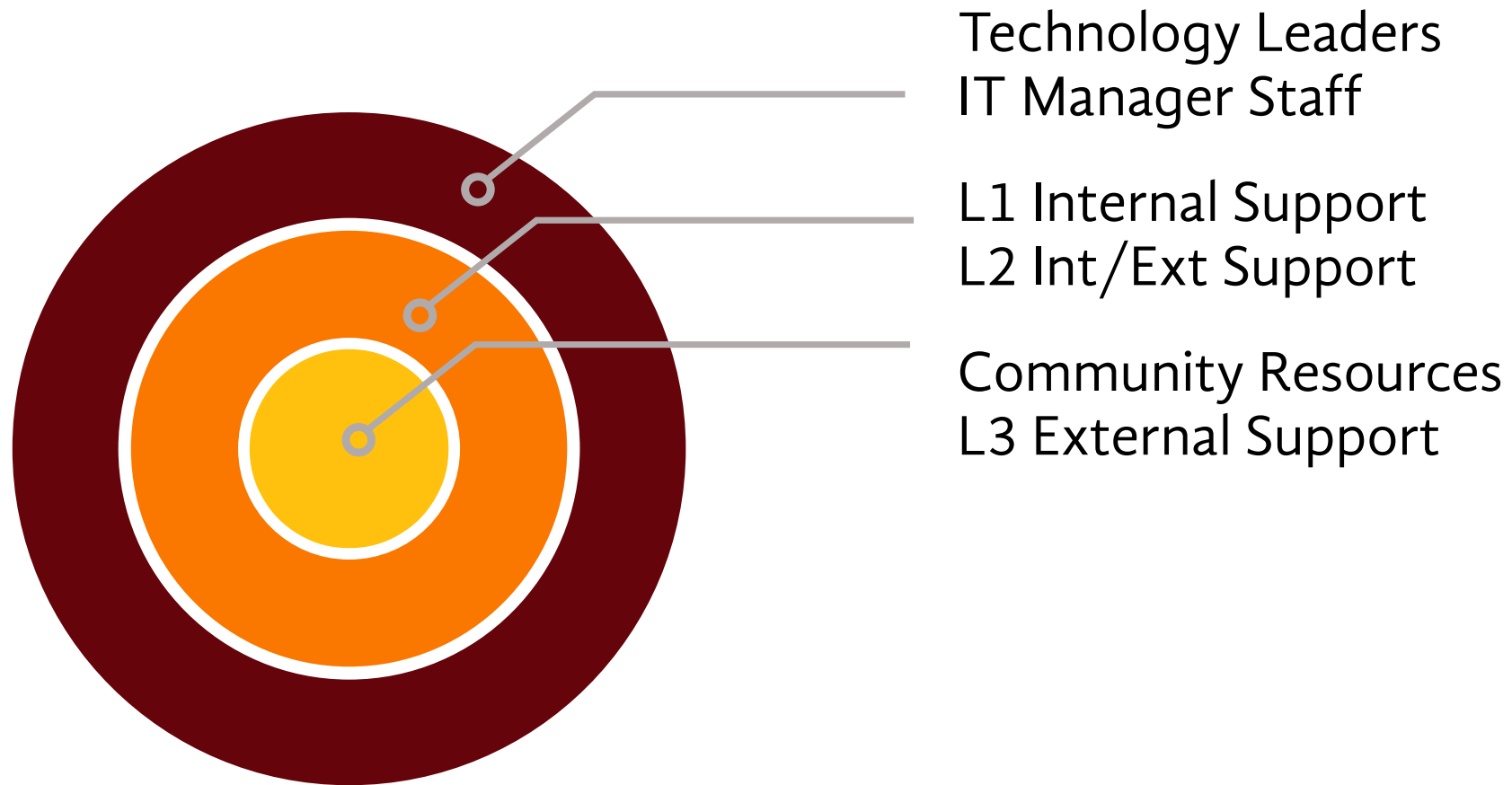
Support Structure

- 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