Refiling: Microsoft Office 2003 (and olde) to Office 2007 (and newer)

Efficiently Migrating Microsoft Office Files

Office files are an essential part of modern development and manufacturing processes. In addition to CAD models, Office files include such important information asspecifications, descriptions, change orders, calculations, etc. Both file types are therefore carefully managed in document management or PLM systems to document the product lifecycle.

The Problem

In regard to the document lifecycle, however, CAD models differ a great deal from Office files. When upgrading an authoring system, most companies take great pains to migrate their CAD models when preserving them is necessary.For Office files, however, it is very frequently assumed that these are upwardly compatible with any future version of the authoring system and can be read, modified and reissued exactly as before.

Sporadic problems with old files can be expected when updating the Office suite. But when updating from Office 2003 (and older) to Office 2007 (and newer), many companies have come to recognize that the files created in older versions cannot always be processed in the new version with any certainty.

With the launch of Office 2007, Microsoft replaced its proprietary binary Office file format with Open XML. This change in direction for file standards is an important step for creating uniformly reproducible and transferable file formats. However, since the standardized, XML-based Open-Doc format (ISO/IEC 26300) is still not supported, many observers see it as only a partial success.

In fact, numerous cases show very different results in the reproduction of the same file with Office 2003 and Office 2007.

What is the measure of accuracy for reproduction? Quite simply, it must be how the file appears in the current authoring system.

Problems with incompatible documents

Differences between versions shouldn't be first noticed when attempting to reproduce older files with newer software versions. In practice, however, this is precisely what usually happens. Then employees must be called upon, often in time-critical situations, to professionally assess the document layout and release the file.

In the case of discrepancies in technical drawings (e.g. special characters), professionals who designed each individual layout must check the correctness of the file inthe new Office version. Furthermore, incompatible files frequently cause errors when printing; the root cause, however, cannot be determined by the document management system.

Is "compatibility mode" the solution?

Since 2007, the MS Office Suite has incorporated a compatibility mode. This converts files in the older format into the new XML format on the fly. When saving the file, the user must decide whether to keep it in the old, binary format or convert it to the XML format. Usually a warningis shown regarding in compatibility.

The 2003 version also has acompatibility mode, which temporarily converts XML-basedfiles from recent versions back into the old binary format for processing. However, this has the same vulnerability, and converting files developed later back into an older format tends to create more problems.

Thus the exclusive use of compatibility mode carries the risks outlined above. Will the software always determine the correct version of the file? Is reading files with an additional separate interpreter for old formats always accurate, or are some elements only approximately emulated?

Specific incidents suggest caution. Then there is the question: will compatibility mode always be offered in future versions of Office?

Microsoft itself has pointed out that not all the elements used in Officecan be transferred from Office format to another without visual changes.

It is clear that a **controlled file migration** - as is typical for CAD - would extremely useful. When updating your workstation to Office 2007 or 2010, existing files can be transferred to the new file format using an automated conversion process monitored by professionals, instead of trying to access Office 2003 files using compatibility mode on the newest version of Office.

In summary, this means:.

> **!** **The conversion of business-critical documents shouldbe carefully monitored when partially or wholly introducing new versions of Office.**

Monitored data migration during version upgr

Analysis and classification of files

Microsoft provides a useful solution to support monitored file migration:the **Office Migration Planning Manager for Office 2010 (OMPM)**. This tool lets the administrator run selective or complete tests on all files and classify the existing files as to risk of deviation during reproduction.

OMPM enables the automatic classification of existing files as

- Old files that are deemed no longer needed per user criteria

- Files that can be safely converted into the new format (no discrepancies)

- Files containing elements that cannot be converted into the new format without manual intervention

These tests also examine and evaluate the functions of macros and VBA scripts in the new Office operating environment.

Monitored data migration: designing and automating the ideal process

SEAL Systems offers the ideal solution for designing fast, safe and efficient data migrations. The Digital ProcessFactory(DPF®) from SEAL Systems lets you easily configure automatic, complete migration processes, from analysis and classification (via OMPM) to sorting, reporting and converting.
DPF is a developmental and runtime environment for the design and sequence controlof IT processes, handling information, data, files and documents.

DPF is highly efficient at designing customer-specific processes, replacing programming with the configuration of standard processes.

The principle: elementary, standardized processing blocks known as working units areassembled into variable processing operations.For assembly and sequence control there are interactive, intuitive business tools.

For Office documents managed in **SAP DMS**, SEAL Systems provides a standard solution with DMS-XSA (Extended Search & Action), which can be integrated into the automated process.

≥ 2007

ades protects you from compatibility issues later.