MALAYSIAN PUBLIC SECTOR
OPEN SOURCE SOFTWARE (OSS)
PROGRAMME

**OPENOFFICE.ORG MIGRATION
GUIDELINES**

Phase III - Self Reliance Edition
March 2013

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1 INTRODUCTION

A large number of Malaysian Government agencies are embarking on an exercise to deploy OpenOffice.org as the productivity tool on the desktop. This exercise is being mostly carried out in tandem with plans to purchase new desktop PCs.

The Malaysian Government agencies are working with MAMPU and Open Source Competency Centre (OSCC) to facilitate this deployment exercise. Assistance provided by OSCC include training, implementation consultancy and technical support services. This document describes the overall migration plans to ensure that agencies are adequately prepared for an effective transition to OpenOffice.org.

2   CHANGE MANAGEMENT PLAN

The OpenOffice.org migration is likely to encounter some resistance from users who are already comfortable in using Microsoft Office or other productivity suite. Therefore, it is important a proper change management plan is prepared to address the transitional challenges to ensure the migration takes place smoothly.

The following approach is recommended in managing the transition to OpenOffice.org within an agency:

1. Identify OpenOffice.org Champions (the term "champions" is used in this document) within departments and sections who can be the first contact point for providing simple support to users within a department or section. The efforts of the "champions" should be recognised, supported and encouraged through appropriate incentives by the management.

2. Conduct OpenOffice.org briefing sessions for senior and middle management teams to achieve a high-level buy-in for OpenOffice.org. This briefing should also include the OpenOffice "champions".

3. Close coordination between agency's Helpdesk and OSCC's Helpdesk to address and resolve OpenOffice.org support issues during and after deployment exercises.

4. Establish a ministry-level OSS governance mechanism to plan, implement and monitor OSS implementation.

The first group of "champions" should include middle management personnel from various departments to spur buy-in into OpenOffice.org. Subsequent to the trainings and implementation roll-out, an OpenOffice.org Champions Summit should be held to bring together all "champions" to share their experiences and identify solutions to common issues.

It is recommended to have a ministry-level OSS Steering Committee or incorporate OSS agenda in the agencies' ICT Steering Committee to plan, implement and monitor OSS implementation within the ministry within a more coordinated approach.

3 TRAINING PLAN

Coordination with OSCC for OpenOffice.org training, should begin with the team of potential OpenOffice.org trainers and technical support team. A series of OpenOffice.org trainings should be carried out for trainers and end-users as follows:

- Train-the-Trainer session
- End-user training for middle and upper management
- End-user training

After the initial training by OSCC, trainers from the agency will lead the other training sessions. Supervision or guidance from OSCC can be provided if necessary.

4 IMPLEMENTATION PLAN

The first meeting should be to discuss implementation requirements and plans. Subsequent to the meeting, a presentation to key personnel to present the approach in planning and implementing the OpenOffice.org migration in the agency.

A sample implementation plan is attached in Section 4.4. The implementation plan to be divided into 3 phases, as follows:

4.1 Phase 1: Pre-Implementation

In Phase 1, the focus of the activities would be in preparing the personnel to easily accept OpenOffice.org during the deployment exercise in Phase 2. A group of OpenOffice.org "champions" representing various department and sections need to be identified to facilitate the acceptance process for OpenOffice.org. The "champions" will act as the main coordinator for OpenOffice.org deployment within their department or section and provide encouragement and support to other staff to use OpenOffice.org.

Once the "champions" have been identified, a series of OpenOffice.org briefing sessions targeted mainly at the senior and middle management team, the IT Support team and the "champions" must be organised. The briefing sessions are intended to achieve the required buy-in of OpenOffice.org among the decision makers. Once convinced on the value of OpenOffice.org, these key decision makers will be able to encourage their staff to adopt OpenOffice.org during the deployment exercise. It is hoped that the senior and middle management personnel will begin to inform and encourage their staff to adopt OpenOffice.org as early as possible so that they can address staff concerns early.

In addition, the planning and preparation for the deployment in Phase 2 will commence in Phase 1. This will include planning the deployment approach, the training schedule and the establishment of an appropriate support mechanism to resolve issues arising during and after implementation.

4.2 Phase 2: Implementation

During Phase 2, OpenOffice.org deployment method will be identified (for example deployed via the purchase of new desktop PCs). The deployment exercise need to be planned and coordinated with the training schedule to ensure that the end-user will be able to receive OpenOffice.org training just-in-time. This will make it easier for the end-user to immediately use OpenOffice.org.

At the same time, we should have OpenOffice.org installed on existing PCs. This will minimise the impact during the transitional stage where two different document formats (OpenOffice.org and Microsoft Office) are being used. The "champions" within the departments and sections should assist in this deployment, and facilitate this transition with support from the Helpdesk.

End-user training will be carried out during Phase 2 to ensure that end-users are able to use the knowledge from the training immediately after they return to their office.

4.3　　Phase 3: Post-Implementation

Once the OpenOffice.org have been deployed, the end-user technical support mechanism will need to provide the necessary guidance to the users in ensuring the users are able to use OpenOffice.org with ease. The Helpdesk will need to work closely together in a first-level and second-level mechanisms, respectively, to address all issues that may be arising from the users.

The technical support flow chart outlining the sequence of obtaining support from "champions" to the Helpdesk is shown Section 5.1.

4.4　　Deployment Of New PCs

The following plan highlights the activities for deploying the OpenOffice.org.

No.	Item	Who	When	Status
A.	**Phase 1: Pre-implementation**			
1.	Identify "champions" in agency's department and sections			
2.	OpenOffice.org "buy-in" briefing to senior & middle management			
3.	Develop 1st batch deployment plan			
4.	Develop training schedule			
5.	Develop support mechanism process			
B.	**Phase 2: Implementation**			
1.	Train the Trainer			
2a.	Deployment of new PCs			
2b.	Training for end-users			
3.	Deployment of OpenOffice.org on existing PCs			
C.	**Phase 3: Post-Implementation**			
1.	Implement support mechanism between agency & OSCC			
2.	Documentation			

5 Technical Support Plan

An effective and reliable technical support is a crucial element to ensure a successful migration to OpenOffice.org. Apart from depending on the Helpdesk for support, the "champions" identified earlier will also play an important part in addressing support issues among users within departments and sections. In other words, the "champions" will be the first level support for users to resolve simple support issues arising from within their department or sections. Users must be made well aware of the availability of this technical support mechanism.

If the problem cannot be resolved by the first level support, then it can be escalated to the second level support which will be the agency's Helpdesk team and later it can be escalated to the third level support at OSCC's Helpdesk. The agency's Helpdesk will be working closely with OSCC's Helpdesk to address support issues that are more complex. It is recommended that at the initial stages, both the agency and OSCC Helpdesk teams shall liaise with each other every 2 days to share and exchange information on OpenOffice.org support issues.

In order to assist users, both Helpdesk will work together to compile a list of Frequently Asked Questions (FAQ) as a quick reference in future. These FAQ shall be put onto the agency's website for easy retrieval by the users.

A migration team comprising of technical members from the agency should be formed to provide the following support:

- Lead and support OpenOffice.org migration.
- Provide document conversion assistance. The migration team should have a copy of MS Office software for document conversion assistance to assist users.
- Provide tools to assist users in OpenOffice.org implementation such as templates for letters, minutes and reports.
- Liase with OSCC Helpdesk to collect and maintain database of migration issues and solutions.

5.1 Problem Escalation at Agency Level

The following diagram illustrates the recommended technical support flow chart for OpenOffice.org problem escalation at the agency level.

Technical Support Flow Chart

For OpenOffice.Org Problem Escalation

At Agency Level

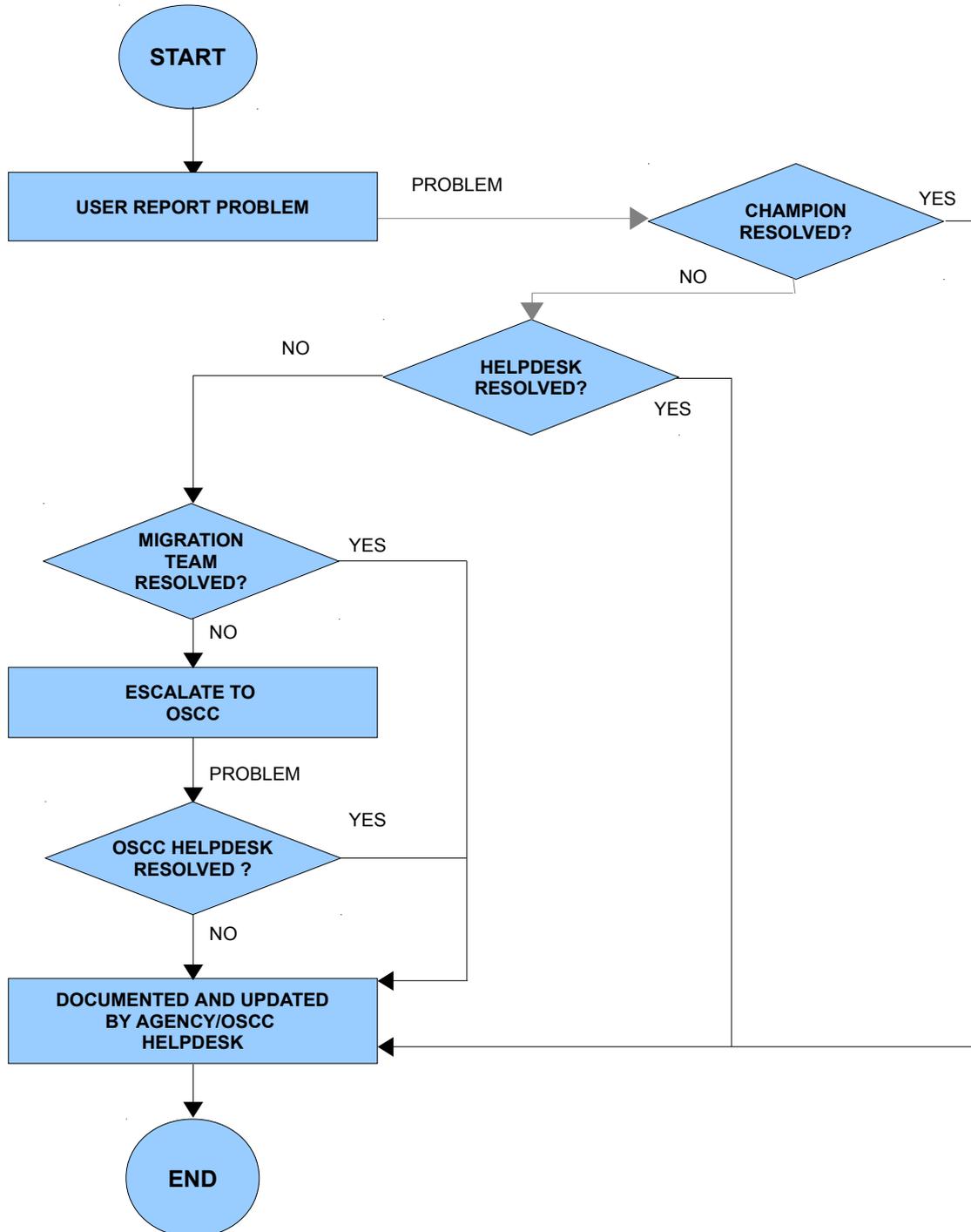*Figure 1: Technical Support Flow Chart For OpenOffice.Org Problem Escalation At Agency Level*

6 OPENOFFICE.ORG BEST PRACTICES

Organizations embarking on implementation of office productivity suites have approached this from many angles. This included provision of training programs, peer coaching and on-the-job training. To support the OpenOffice.org implementation, changes in the way users create documents need to be addressed and standardised.

This document describes best practices to improve operational efficiencies in exchange of office electronic documents.

6.1 Management Matters

6.1.1 Policies

1. Provide a standard version of **OpenOffice.org** for installation on all stations. Another distribution of OpenOffice.org is **LibreOffice** (http://www.libreoffice.org) which is developed by the OpenDocument Foundation and is fully compatible with OpenOffice and ODF document formats.

2. Provide a list of standard extensions and its version that should be installed in all OpenOffice.org installations.

3. Ensure that the version of OpenOffice.org is kept updated and synchronised.

6.1.2 Default Documents

1. The standard file formats for saving must be determined.

   a) Currently **Open Document Format (ODF) 1.2** is recommended.

   b) For archiving purpose, the **Portable Document Format (PDF)** is to be used.

2. In the OpenOffice.org User Data option, all fields must be filled correctly. This allows tracking of changes in documents correctly.

6.2 Standard Formatting

6.2.1 Templates

1. The following is to be made available to all users:

   a) A template of default styles. Users can load the template or just the styles from the Styles and Formatting dialog box.

   b) Relevant templates of commonly used documents should be made available to users.

2. The templates are to provide the **default values for formatting**. This includes;

   a) Page size (A4 recommended)

   b) Font types and sizes

   c) Setting for line spacings

6.2.2 Creating Documents

1. All new documents should be created from an existing template as defined above (6.2.1).

2. If no suitable template is available, the user may use the default template.

3. Initial stage of document creation should emphasize on its contents and flow. Once the basic structure of the document is ready, use the Styles and Formatting dialog box to apply the required styles.

6.2.3 Using MS Office Documents

For most office productivity requirements, OpenOffice can convert MS Office documents up to version 2010, except in cases which involve complex layout / formatting or macro programming. When converting documents, follow the following steps:

1. Open the MS Office document using OpenOffice Writer, Calc or Impress. OpenOffice can directly open MS Office documents in DOC/DOCX, XLS/XLSX and PPT/PPTX formats.

2. Scan through the converted documents to ensure all content, including text, images are intact. Fix any formatting or layout discrepancies if any.

3. Save the converted document in respective ODF formats: ODT, ODS or ODP.

6.2.4   Format layout

1. Paragraphs should be format using pre-defined styles. Where possible, avoid formatting characters and paragraphs directly.

2. Use Heading styles for grouping of topics into logical structures. The order should be Heading 1, Heading 2, and so on.

3. Change or create heading styles to suite the document. Do not skip heading levels.

4. All hyperlinks must be descriptive.

5. Use bullets or numbered list. Manual characters used as bullets or numbering should not be used.

6. When copying bullets or list from another document, paste as plain text to avoid loss of current formatting.

6.2.5   Graphics

1. Recommended image/graphics formats are GIF, JPG or PNG.

2. Graphic elements such as images, diagrams or charts in a document must have information about those graphics in the text of the document.

3. Embed the images/graphics into the document instead of linking external images/graphics to avoid broken links when sending out documents.

4. Avoid flashing, blinking and similar animated text.

6.2.6   Tables

1. Rows in a table that is the heading must be format as Table Heading style.

2. Normal rows in a table must be format as Table Contents style.

6.2.7   Printing Documents With Writer

In the print option, uncheck the "Print automatically inserted blank pages".

6.3 Presentation With Impress

6.3.1 General

1. Each slide should use the predefined slide layout.

    a) Tables should be added with the tables layout.

    b) Charts should be added with the chart layout.

    c) Column arrangement should be done with the predefined layout where possible.

2. News slides should be built with the Outline View. This will allow focus on the content before beautification takes place.

6.3.2 Audio and Movies

1. All audio and movie embedded must use the standard format that is supported by OpenOffice.org

    a) Audio: MPEG, OGG or 3GPP

    b) Video: MPEG, OGG, Divx, FLV or AVI

2. Limit one audio and video per slide to reduce the need for extremely high memory usage.

6.4 Spreadsheet With Calc

1. Use row and column headers extensively and avoid ambiguity within these headers. Make them clear and self-explanatory. Use the Heading and Heading 1 styles.

2. All sheets must be given descriptive names.

3. Use region names for individual or group of cells.

    a) This allows functions to refer to specific cells.

    b) Users can use the 'Go-To' tool to quickly moved around the spreadsheet.

6.5   Other Issues

6.5.1   Macros

1. Usage of macros should be minimized.

2. Use the extensions to add functionality to OpenOffice.org. Extensions support the programming language in Java, Python and C++.

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