

# **The Migration of Microsoft Excel Tools to Next Generation Platforms**

## **Can You Hear the Footsteps?**

**Jeremy Eden**

**ICEAA Conference – San Diego, CA**

**June 2015**

# Agenda

- ▶ The Footsteps...
- ▶ Background
- ▶ Adaptable Tool Design Considerations
- ▶ Additional Considerations
- ▶ Stakeholder Advantages to Platform Migration
- ▶ Summary
- ▶ Resources ([Download the checklist!](#))
- ▶ Questions



# The Footsteps...

Most aren't aware that the software platform upgrade process is accelerating and tool migrations must be considered...



Microsoft Office 2016

**Release:  
Summer 2015**



Microsoft Windows 10

**Release:  
Fall 2015**

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# Background

# Background – What are Microsoft Excel Tools?

User friendly tools designed to allow users of varying skill sets quickly conduct analysis for many types of programs. Tools can include functionality that **would not ordinarily be available without significant impacts to cost, acquisition, security, and information technology (IT) within an organization**. These tools enable users to...

- ▶ Quickly generate problem solving tools that the user can see rapid return on investment
- ▶ Generate tools that serve as advanced prototypes for enterprise solutions
- ▶ Do not require Software Acquisition Programs oversight
- ▶ Provide a more efficient, effective and accurate means of developing analytical results
- ▶ Reduce experience and expertise required to complete specific analytical processes
- ▶ Promote collaboration within an analytical process to assure validated and accurate results
- ▶ Conduct analysis in a dynamic interface environment that assists the user instead of just accepting inputs and provide outputs



# Background – Why use Microsoft Excel?

**Microsoft Excel allows the implementation analytical tools through Microsoft Office Applications.**

## **Benefits:**

- ▶ Utilizes “host” application already adopted widely by many organizations
- ▶ Allows sharing/manipulation of data and activities between organization users
- ▶ Has same security as MS Excel
- ▶ Future of Microsoft Office is changing, but Microsoft continues to support in the Standalone version of Excel



# Background – Reasons Some Avoid Migrating (1 of 2)

Tools are often not migrated when new platforms are released for a number of reasons...

- ▶ The sponsor organization has not announced a change in platform
- ▶ It is assumed that nothing is “really different” in the new platform
- ▶ Sponsors don’t want to commit resources to the migration
- ▶ The tool continues to work fine for sponsors and users without upgrading



**This reasoning can lead to problems...**

# Background – Reasons Some Avoid Migrating (2 of 2)

## **BIG problems ...**

**Due to the dependence Excel tools have on the platform, unforeseen changes in the platform can greatly impact a tool including:**

- ▶ Features/functions that once existed no longer are included in the platform
- ▶ Features/functions are not executed in the same manner as they were in the past
- ▶ The sponsor organization has taken the opportunity to upgrade security policies with a platform and certain permissions are no longer available
- ▶ The tool may not run



**Did you know that been you open a new workbook in Microsoft Excel...**

### **Version 2010**

- ▶ You will be presented with THREE blank sheets

### **Version 2013**

- ▶ You will be presented with ONE blank sheet



# Adaptable Tool Design Considerations

Tool design considerations that can impact functionality of a tool when migrated from one software platform to another:

- ▶ Does the tool utilize Macros?
- ▶ Does the tool utilize ActiveX Controls?
- ▶ Has Visual Basic for Applications (VBA) programming been used?
- ▶ Is the tool designed to accommodate particular security policies?
- ▶ Has the tool been designed to serve multiple platforms at the same time?
- ▶ Is the tool packaged in a utility program for deployment?
- ▶ Does the tool use data transfer protocols to pass information over networks?
- ▶ Many more...



# Additional Considerations

**Additional factors that should also be considered when assessing tool migration impacts:**

- ▶ Documentation
- ▶ Security and Data
- ▶ Testing
- ▶ Packaging



# Stakeholder Advantages to Platform Migration

Although it does require effort, many advantages are provided to the following tool stakeholders when migrating a tool from one platform to the next:

## Tool Developers

- ▶ Ability to plan instead of using “quick fixes”
- ▶ Incentive to add new features that leverage new platforms
- ▶ Insight to avoid certain development practices
- ▶ Ability to provide tool to user community with limited interruptions

## Tool Sponsors

- ▶ Continued return on investment by extending tool lifespan
- ▶ Showcasing the tool as a professional product that can be maintained
- ▶ Ability to consider expansion and enhanced capability
- ▶ Continued return on investment by extending lifespan of support products (documentation, training, metadata, websites, etc.)

## Tool Users

- ▶ Confidence that work performed using a tool today can be replicated and continued tomorrow
- ▶ Continued use of tool without interruption
- ▶ Satisfaction that tool and tool sponsors care about users and their continued support
- ▶ Continued return on training, skills, and time invested in tools



# Summary

Microsoft Excel Tools to perform analysis and estimating continue to be popular as faster timelines/greater accuracy are demanded, budgets/manpower are reduced, and organizations strive to streamline and standardize processes. **The ability of a seasoned analytical tool to endure platform migrations is often decided by the following :**

▶ **Get ahead of the migration**

- Tools should be designed with maintenance in mind, not built to only satisfy one development cycle or platform

▶ **Utilize best practices**

- Pay attention to upcoming platform changes, maintain documentation, provide adequate resources, embrace communication between stakeholders

▶ **Change is ok!**

- Don't be intimidated by new platforms. Find out what new platforms can offer a tool and see how they can be implemented. Instead of enduring the migration to a new platform, embrace and capitalize on it.
- Developer forums and internet resources are an excellent source for information. "Everyone has tools deployed that must be updated."



# Resources

## Programming Resources

Microsoft Answers Community

<http://answers.microsoft.com/en-us/office>

Support for Microsoft Office Community Forums

[http://support.microsoft.com/gp/gp\\_newsgroups\\_master](http://support.microsoft.com/gp/gp_newsgroups_master)

Microsoft Developer Network VBA Forums

<http://social.msdn.microsoft.com/Forums/en-US/isvvba/threads>

Mr. Excel.com

<http://www.mrexcel.com/forum/forum.php>

Excel Forum

<http://www.excelforum.com/>

The Code Cage Forums

<http://www.thecodecage.com/forumz/index.php>

## Security Resources

PC Tools by Symantec Secure Password Generator

<http://www.pctools.com/guides/password/>

## Installer Package Resources

Caphyon Advanced Installer

<http://www.advancedinstaller.com>

## Other Resources

Of course...

Google

[www.google.com](http://www.google.com)



**Download My Full Adaptable Tool  
Design Checklist and use it!**

(Available April 1<sup>st</sup>, 2015 through June 12<sup>th</sup>, 2015)

<http://tinyurl.com/EdenICEAAConference2015>



# Questions?

**Jeremy Eden**  
Associate

Booz | Allen | Hamilton

Booz Allen Hamilton Inc.  
Tel (703) 377-5871  
Eden\_Jeremy@bah.com

