

# ODF Business Case Toolkit:

## A Guide To Governments On Evaluating the Cost of Moving to ODF Compliant Applications

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<b>Questions About the Financial and Qualitative Costs of Your Current Environment</b>	<b>Answers: Yes / No / Further work needed?</b>
<p><b>Integration with Business Systems</b></p> <p>Relevant to all organizations.</p> <p>➤ Do you have business systems that require specific office software to generate documents or analyze management information?</p> <p>➤ Do you currently pay for bespoke integrations?</p> <p>➤ Do you have service units that cannot work to full effectiveness due to inability of office software to integrate with their business system?</p>	
<p><b>Data Sharing within your Organization</b></p> <p>Relevant to organizations with a mixed office software environment.</p> <p>➤ Do you have service units that have to convert files from one format to another in order to share data with other parts of your organization?</p> <p>➤ How much time does it take to handle these conversions? (Gather data from a range of sample service units, and do thumbnail estimates of activity costs)</p>	
<p><b>Data Sharing with External Organizations</b></p> <p>Relevant to organizations with a mixed office software environment.</p> <p>➤ Do you have service units that have to convert files from one format to another in order to share data with external partner organizations?</p> <p>➤ How much time does it take to handle these conversions? (Gather data from a range of sample service units, and do thumbnail estimates of activity costs)</p>	

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<p><b>Budgeting and Purchasing</b></p> <p>Relevant to all organizations.</p> <ul style="list-style-type: none"> <li>➤ Do you centrally manage the process of software licensing? How much activity is involved and what does this cost?</li> <li>➤ What is the likely cost to your organization of responding to a demand for a software license audit, and/or the financial penalties if found to be non-compliant with licensing?</li> <li>➤ Do you have sufficient financial resources to replace office software in a planned and regular cycle?</li> </ul>	
<p><b>Support</b></p> <p>Relevant to all organizations.</p> <ul style="list-style-type: none"> <li>➤ What level of support do you provide for office software? <ul style="list-style-type: none"> <li>➤ Provision of the software and technical support if it fails.</li> <li>➤ Support in using features of the software.</li> <li>➤ Support in developing office automation solutions with the software.</li> </ul> </li> <li>➤ What are your current costs for doing this? If you have a mixed office software environment are you paying additional costs for multiple skillsets, or providing a lower level of service?</li> <li>➤ Standardizing on a single product throughout the organization will enable support to be provided more economically and effectively.</li> </ul>	
<p><b>Training and Knowledge</b></p> <p>Relevant to all organizations.</p> <ul style="list-style-type: none"> <li>➤ Are the office software users in your organization trained to a standard level of competence, e.g. ECDL, or do you have skills gaps?</li> <li>➤ Does complexity in your existing office software environment hinder the productivity of staff if they move from one office or section of the organization to another?</li> <li>➤ Are you able to secure the financial resources required to invest in widespread user training while retaining or replacing proprietary licensed software?</li> </ul>	

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<p><b>Software Installation and Upgrades</b></p> <p>Relevant to all organizations.</p> <p>➤Does your current office software portfolio make the software installation and upgrade process simple or does it cause complexity?</p> <p>➤Simple = centralized license management, version control, and remote deployment of software. Installation and upgrade requests can be assessed and implemented quickly and easily.</p> <p>➤Complex = distributed license management (or lack of management), multiple and uncontrolled versions (and/or multiple products), no standard deployment method (some combination of CD installation, disk imaging, network server-workstation model, thin-client model, automated remote deployment).</p> <p>➤Implementation of a new standard enables a new cost-effective deployment approach to be adopted.</p>	
<p><b>Open Access and Ability to Re-use Data</b></p> <p>Relevant to all organizations.</p> <p>➤Do you have plans to introduce XML based Web Services and Service Oriented Architecture into your organization?</p> <p>➤Are you able to access and re-use data stored in office software files as part of other business processes?</p> <p>➤Do you need to invest in additional proprietary products to benefit from re-use?</p>	
<p><b>Decision-Making Process</b></p> <p>➤How much effort will you need to expend supporting the decision-making process?</p> <p>➤What capital costs are required for evaluation and testing environments?</p>	
<p><b>Project Management</b></p> <p>➤What will project management resources cost you?</p> <p>➤Implementing a new office software product is a typical ICT project and requires the same quality and amount of project management resource that you would normally provide.</p> <p>➤The complexity and challenge of the project will depend largely on its scope – how many users, over how many different functions and locations.</p>	

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<p><b>Communications</b></p> <p>➤How much effort and resources are required to communicate with staff about the change?</p> <p>➤Any change project will require a minimum level of communication, but because there is currently greater perceived risk about open source products, more effort is likely to be required.</p>	
<p><b>Training – Technical and User</b></p> <p>➤Do you have existing technical support skills in the office suites you are considering? What will it cost you to buy them or to train internal support staff?</p> <p>➤What provision do you already make for training staff? What will it cost to provide training in the new software?</p> <p>➤What office software skills do the staff in your organization have already?</p> <p>    ➤What products?</p> <p>    ➤What level of competence?</p> <p>➤Based on your answers to the above, what learning needs will your staff have in using the new product, what form of training solution will work best and what will it cost?</p>	
<p><b>Deployment and System Testing</b></p> <p>➤Do you have existing technical methods and tools for deploying and testing new software packages?</p> <p>➤What will it cost you to package and configure your new office suite to deploy using your existing methods and tools?</p> <p>➤What will it cost you to learn new methods and implement new tools if required?</p> <p>➤What will it cost you to deploy your new office suite manually to desktops and laptops not accessible using automated methods? What are the challenges involved?</p>	
<p><b>Desktop Computer Hardware Upgrades</b></p> <p>➤Various office suites have different hardware requirements. Many suites will run on older, less powerful hardware that Microsoft Office does not support.</p> <p>➤You may choose to include the costs of hardware replacement in the business case, especially if you would otherwise not need to upgrade your desktop computer environment.</p>	

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<p><b>Document Conversion</b></p> <ul style="list-style-type: none"> <li>➤ Using a combination of tools and expertise, analyze the content of files, and segregate them into simple and complex categories.</li> <li>➤ Simple files can be converted just by being opened by the user in ODF compliant platforms, at the point that they need to edit them, and then saved in the relevant ODF format.</li> <li>➤ Complex files will need additional effort, either through provision of a central technical resource to fix conversion problems, or through training users to a higher level of knowledge and providing guidance materials so that they can do it themselves.</li> </ul>	
<p><b>Business System Integration</b></p> <ul style="list-style-type: none"> <li>➤ Inventory your line of business systems.</li> <li>➤ Assess whether integration work or exceptions for Microsoft Office are necessary.</li> <li>➤ Calculate the cost of maintaining a proportion of Microsoft Office licences for approved exceptions.</li> </ul>	

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<p><b>Database Integration and Support Issues</b></p> <p>➤ Inventory your locally developed “desktop” database applications – e.g.; Microsoft Access, Lotus Approach, Corel Paradox.</p> <p>➤ Identify the role of these desktop databases – some will be very ad-hoc and throwaway, but many will actually be bespoke line of business systems. (There may be a lack of documentation and knowledge about these systems, and your IS/IT Security Policy may lead you to review the future direction of support and development for them.)</p> <p>➤ Classify these databases into categories:</p> <ul style="list-style-type: none"> <li>➤ Multi-user, mission-critical, line of business systems.</li> <li>➤ Multi-user, non-mission critical, administrative systems.</li> <li>➤ Single-user, mission critical, line of business systems.</li> <li>➤ Single-user, non-mission critical, administrative systems.</li> </ul> <p>➤ Determine the appropriate actions for each system:</p> <ul style="list-style-type: none"> <li>➤ Leave in place, users all retain Microsoft Access.</li> <li>➤ Leave in place, developer retains Microsoft Access, users provided with runtime.</li> <li>➤ Replace with new application system (third party procured or in-house developed).</li> <li>➤ Develop or commission replacement database.</li> <li>➤ Train users and leave them to develop replacement databases when required.</li> </ul>	
<p><b>Writing and Supporting Applications and Macros</b></p> <p>➤ Gather data on files containing macros.</p> <p>➤ Identify the file owners, and who developed the macros.</p> <p>➤ Gather all the documentation available on the purpose for the file, the tasks performed by the macros, the business rules involved, the way the code works, and expected outcomes.</p> <p>➤ Assess the effort required to convert the macro or the cost of third-party services.</p>	

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<p><b>Implementation Support</b></p> <p>➤What are the costs of providing the appropriate number of floorwalkers for the term of your implementation project?</p> <ul style="list-style-type: none"> <li>➤Typical salary for skill set required</li> <li>➤Number of people to support per day</li> <li>➤Number of people to support in total</li> <li>➤Total days of support required</li> </ul>	
<p><b>Productivity Gains or Losses</b></p> <p>➤Identify the relevant categories for your organization, e.g.</p> <ul style="list-style-type: none"> <li>➤Frontline staff</li> <li>➤Service professionals – Housing Officers, Social Workers, Teachers, Planning Officers,</li> <li>➤Office Administrators in all services</li> <li>➤Managers</li> <li>➤Technical professionals – Surveyors, Scientific Officers, Engineers, ICT Officers, Accountants</li> </ul> <p>➤Take samples from representative teams in these areas, along with brief interviews of key users to establish the common usage made of office software.</p> <p>➤Map these samples on the categories of Data Entry, Structured Task, Knowledge Worker, and High Performance User.</p> <p>➤Distinguish between internally and externally focused users.</p> <p>➤Using the data you have gathered and mapped to these analytical categories, make an assessment of the proportion of users who will suffer productivity losses.</p>	
<p><b>Collaboration Feature Benefits</b></p> <p>➤Identify the business processes that currently take advantage of collaboration benefits by building office automation systems using the Microsoft Office System.</p> <p>➤Assess the cost be in reduced business efficiency if you lost these collaboration benefits.</p> <p>➤Calculate the cost of retaining and supporting Microsoft Office in these parts of your business.</p>	

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<p><b>Smart Tag Benefits</b></p> <ul style="list-style-type: none"> <li>➤ Using the data gathered from representative teams in your organization, identify the areas that use Smart Tags.</li> <li>➤ Make an assessment of the additional work that would be required to complete tasks without Smart Tags.</li> <li>➤ Calculate the cost of retaining and supporting Microsoft Office in these parts of your business.</li> </ul>	
<p><b>Support for People with Disabilities, and the Use of Assistive Technologies</b></p> <ul style="list-style-type: none"> <li>➤ Determine what accessibility features of the desktop are being used (e.g. large print themes, StickyKeys) and determine if those continue to work equally well in the ODF compliant application.</li> <li>➤ Find out what assistive technologies are in use by people with disabilities in your organization, and determine which features of those assistive technologies are being used.</li> <li>➤ Determine whether those assistive technology features will continue to work equally well in the ODF compliant application. If not, determine if an alternate assistive technology (perhaps on an alternate operating system) provides all of the features being used.</li> <li>➤ Calculate the cost of developing training materials and retraining of users with disabilities in any of the following that are applicable based on the above determinations: <ul style="list-style-type: none"> <li>➤ Using their existing assistive technology with the ODF compliant applications</li> <li>➤ Using a new assistive technology with the existing operating system, existing applications, and the ODF-compliant applications</li> <li>➤ Using a new assistive technology on a new operating system with the ODF-compliant applications and any other applications they will be required to use in the new operating system environment</li> </ul> </li> <li>➤ Calculate the cost of retaining and supporting Microsoft Office for individuals whose accessibility and assistive technology needs cannot otherwise be met.</li> </ul>	