



Indelligent Asset Conversion Inspector
User Documentation
Version 2.1.0.0

NewFormat AB
Appointed Reseller of Asset Conversions Inspector
Nordic and Baltic Region
www.newformat.se

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1. Background

Purpose

The Indelligent Asset Inspector is an application used to analyze the structure of documents created with the Microsoft Office Suite. The purpose of this analysis is to understand the features of the MS-Office Suite used to construct the documents, as well as the overall complexity of the documents, including any automation.

The objective of the scan and follow-on analysis is to provide an understanding of the effort involved in replacing MS-Office with IBM Lotus Symphony as the software package used to create, edit and access content in a particular business environment.

Results

The scan identifies specific content within the MS-Office Documents that may be issues if MS-Office is replaced with IBM Lotus Symphony. The output and resulting analysis does not actually convert the body of content under review, rather it supports migration approach recommendations and estimates of resulting effort.

The data extracted and analyzed by ACI does not contain the actual business content of the documents, minimizing potential security concerns associated with the process.

Execution Times

The time required to complete execution of the scanning process will depend on a variety of factors including speed of the workstation running the software, speed of data access and the location where results are being stored. Overall expectations can be set at 1 - 2 seconds / file scanned, although realized times may vary substantially based upon the factors above as well as the raw size of the files involved.

Overall Process

The actual execution of ACI is typically a single component of the overall discovery and analysis task that should be undertaken prior to a technology initiative as significant as replacing an organization's productivity suite. Figure 1 shows a typical overall discovery initiative that includes ACI scan execution.

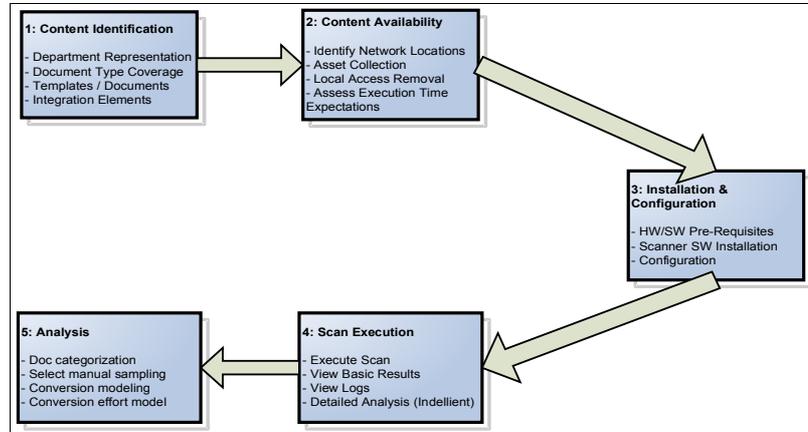


Figure 1: High Level Scanning Process

Note that this document focuses primarily on the scanning activity itself – or stages 3 and 4 in Figure 1. A successful discovery effort will require attention to stages 1 and 2, particularly the identification of representative content (unless all assets for the organization are being included in the scanning process). The final analysis will ideally be completed by a document conversion expert.

Contact Information

For further information on the Indelligent Asset Conversion Inspector, please contact NewFormat AB - Appointed Reseller for Nordic and Baltic Region:

Email: aci@newformat.se
 Phone: +46 (0)70 631 53 0

Installation Preparation

Minimum Workstation Requirements

Before installation, please ensure your workstation has the following components:

Software

- Microsoft Windows XP, Service Pack 2
- MS-Office 2003 Or MS-Office 2007 (Word, Excel and Powerpoint) Installed
- Visual Basic for Applications
 - *This component is a feature of the MS-Office Installation and can be found under Other Shared Features*
- Microsoft .NET Framework 3.5

Hardware

1. 1GHz 32-bit (x86) processor
2. Minimum of 1 GB of system memory
3. 60 MB of available hard drive space

MS-Office 2003 Configuration

Prior to using the Asset Conversion Inspector, the security settings in MS Excel, Word and Powerpoint must be properly configured to allow the Asset Conversion Inspector to analyze the document. This section covers settings for MS-Office 2003; see the section below if you are using MS-Office 2007 or greater.

Before continuing, confirm that all instances of MS Office are closed.

The following example displays the configuration of Excel 2003. **The same steps must be also be performed for Word 2003 and Powerpoint 2003.**

Launch a new instance of the MS-Office application. From the menu, select “Tools” -> “Options...”. This is displayed in Figure 2.

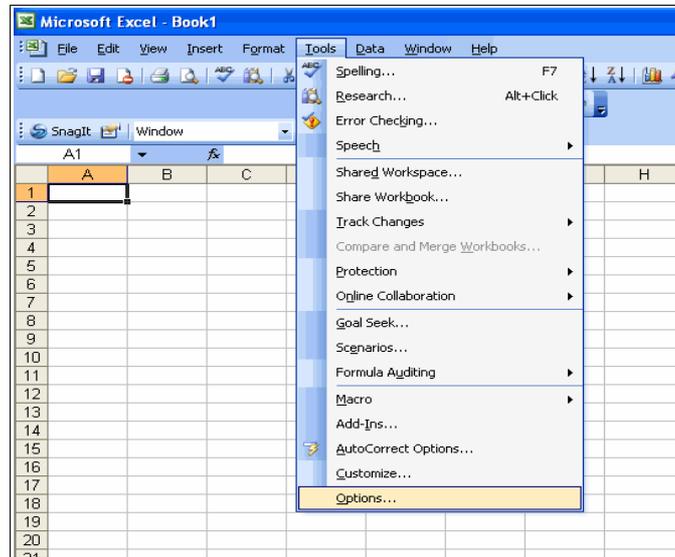


Figure 2: Tools -> Options...

From the “Options” dialog, select the “Security” tab followed by clicking the “Macro Security...” button. This is depicted in Figure 3.

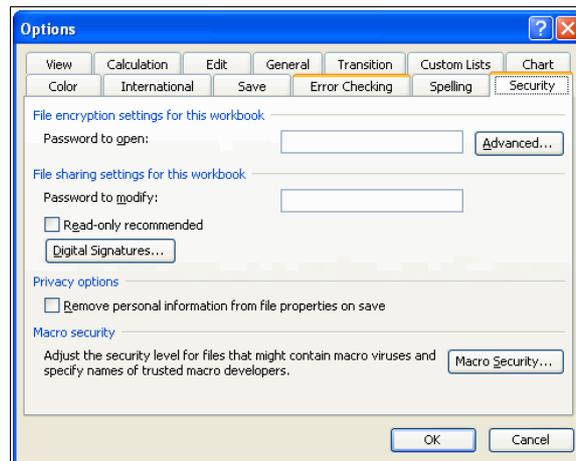


Figure 3: Options Dialog

When the “Security” dialog appears, select the “Trusted Publishers” tab and ensure the check-box labelled “Trust access to Visual Basic Project” is checked. See Figure 4.

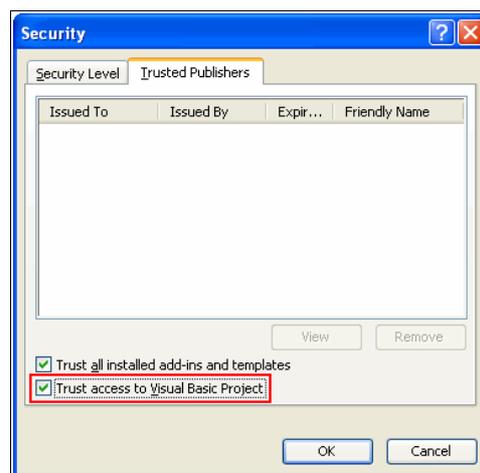


Figure 4 : Security Dialog

Once the check-box is checked, click the “OK” button on all the dialogs to apply the settings and close MS Excel.

Complete all the above mentioned steps in order to configure the security settings for MS Word and MS Powerpoint.

MS Office 2007 or Greater Configuration

Prior to using the Asset Conversion Inspector, the security settings in MS Excel, Word, and Powerpoint must be properly configured to allow the Asset Conversion Inspector to analyze the document. **Before continuing, confirm that all instances of MS Office are closed.**

The following example depicts the configuration steps for MS Word 2010+. **These steps must be completed for Excel and Powerpoint as well.**

Launch a new instance of the application.

Open the Application Options by clicking the menu button and then the options button (see Figure 5).

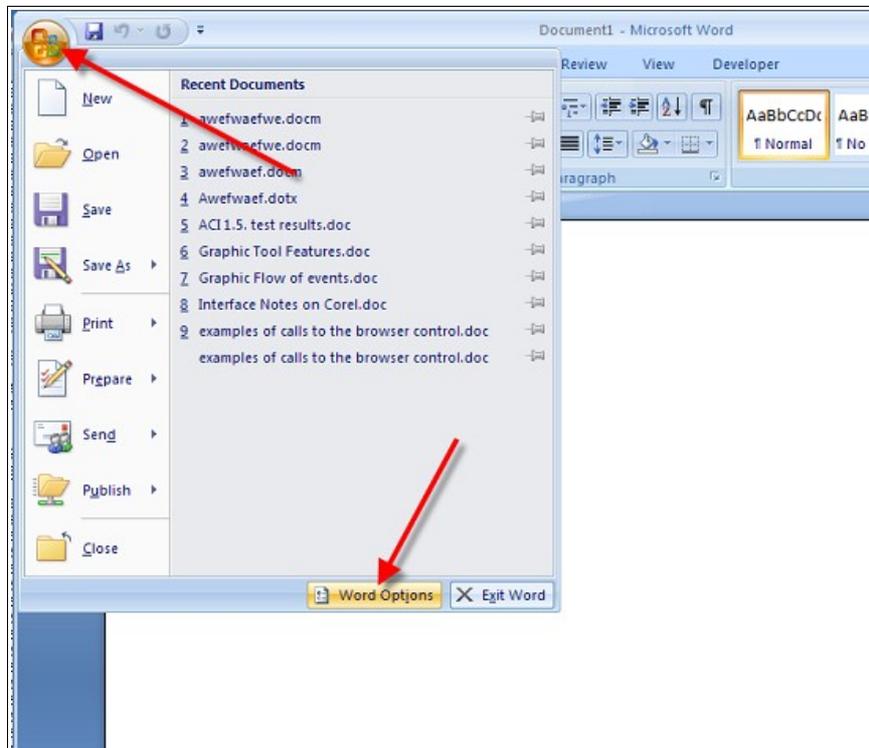


Figure 5 : 2007 Options

Go to the Trust Center Tab and click on Trust Center Settings.

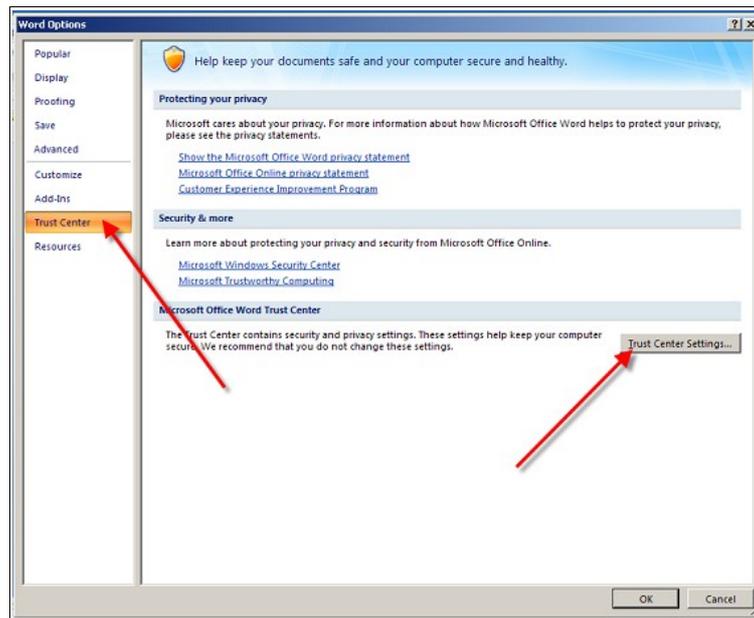


Figure 6 : 2007 Trust Center

Ensure that the 'Trust access to the VBA project object model' is CHECKED.



Figure 7 : Trust access check-box

Repeat the above mentioned steps in order to configure the security settings for MS Excel and MS Powerpoint.

1. Installation

In order to begin the installation, confirm that the installer package labelled “ACI.Install.2.1.0.0.exe” is located on the same physical storage drive as the installation of Microsoft Windows XP. Prior to launching the installer, please ensure that all instances of web browsers are closed.

The installer package can be launched by double clicking it. The Asset Conversion Inspector Set-up Wizard will be launched. Click the button labelled “Next >” to continue. This is shown in Figure 8.

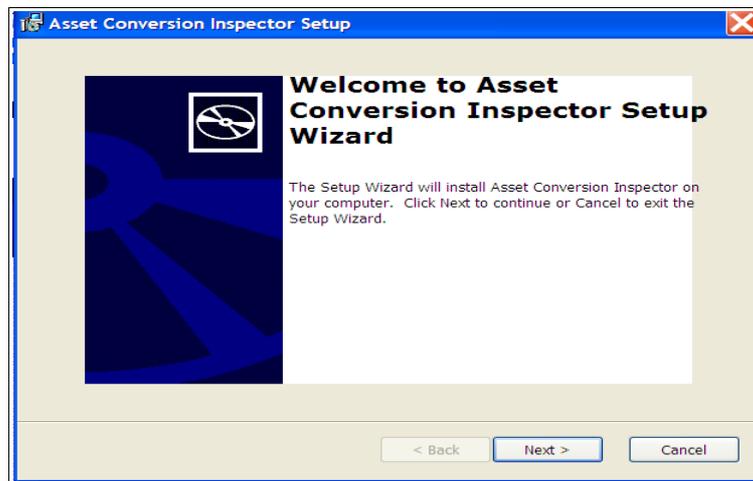


Figure 8: Asset Conversion Inspector Installation Wizard

This will bring about the End-User License Agreement dialog. In order to continue with the installation, the user must read and agree to the End-User License Agreement and click the button labelled “Next >” to continue. This is illustrated in Figure 9.

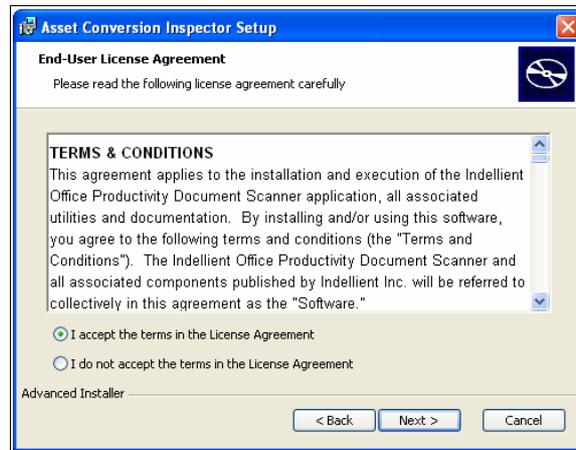


Figure 9: End-User License Agreement Dialog

When the “Ready to Install” dialog appears, click the button labelled “Install”, to start the installation of the Indelligent Asset Conversion Inspector.

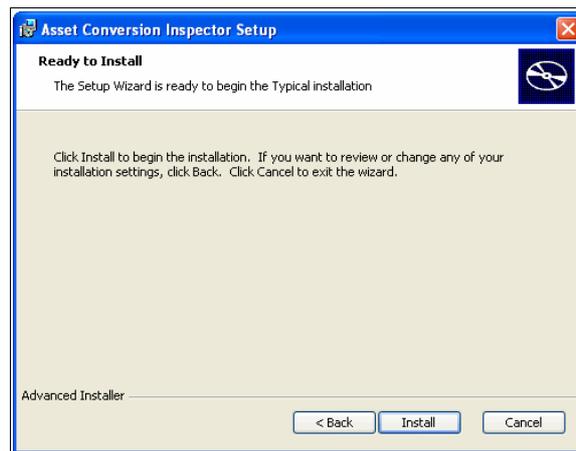


Figure 10: Ready to Install Dialog

Once the installation is complete, click the button labelled “Finish”. This will complete the installation.

2. Launch Asset Conversion Inspector (ACI)

To launch the Asset Conversion Inspector, click on the icon that was placed on your desktop as seen in Figure 11.

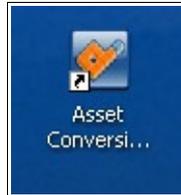


Figure 11 : Asset Conversion Inspector

License Validation (first time only)

Upon launching the Asset Conversion Inspector for the first time, the user will be prompted to enter a valid license key in order to activate the software. This is displayed in Figure 12. Please email the Validation Key to the email address: aci.support@indelligent.com. A valid license key will be emailed to the user.



Figure 12 : License Key Validation Dialog

Once confirmation of a valid license is complete, the initial screen of the Asset Conversion Inspector is displayed. See Figure 13.

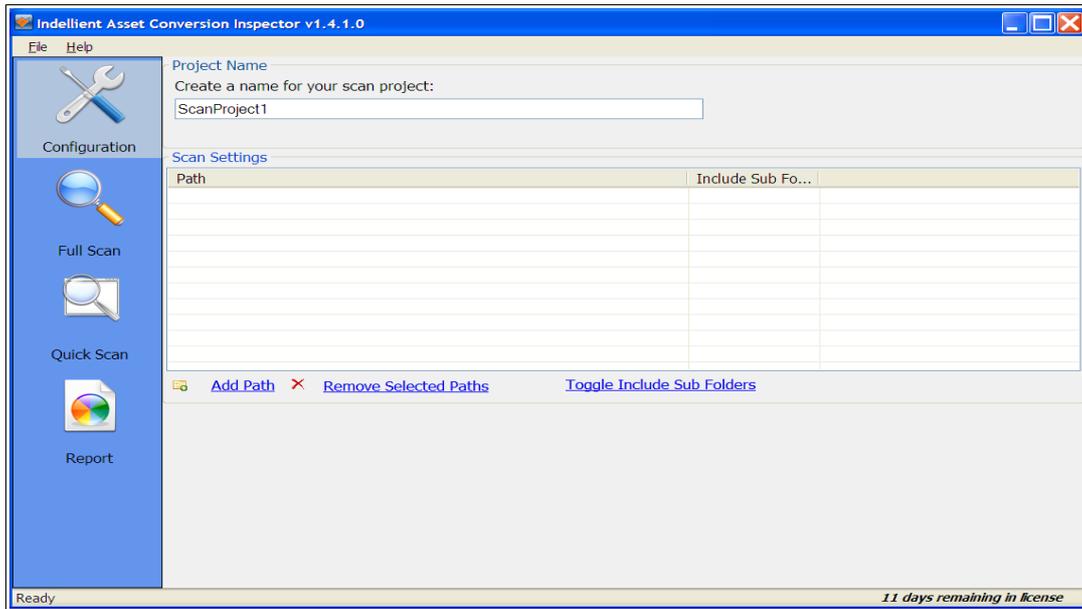


Figure 13 : Asset Conversion Inspector Initial Screen (Configuration)

Asset Conversion Inspector Configuration

When launching the Asset Conversion Inspector application, it defaults to the configuration screen (see Figure 13 above). The following table describes each feature of the configuration page that can be used to control the specifics of your scan. Note: the configuration you set will apply to either the full or quick scan.

Component	Description
Project Name	This should be a user friendly identifier for each unique scan project / execution
Add Path	This allows you to add root directories for the scan. Click “Browse” to select the path. Repeat and select all root directories that you want included in your scan. Note: If the target files are not all in the root, be sure to select 'yes' for 'Include Sub Folders'
Toggle Include Sub Folders	Select the path(s) you wish to change and click on 'Toggle Include Sub Folders. You may use the 'shift' or 'ctrl' keys to select as many paths as you wish.

Content – Locations and Preparation

The scanning process requires ACI to access all data within each file scanned even though the structural elements are all that is stored. The speed of execution can therefore be improved by creating a separate local copy of the files of interest or at least executing the program from a location with good bandwidth access to the physical files. If the files are located across a distributed network, including files in remote locations separated by slow network segments, execution time for ACI can be significantly extended.

3.Full Scan Execution

Once you have completed the configuration, select the Full Scan tab on the left of ACI: See Figure 14:

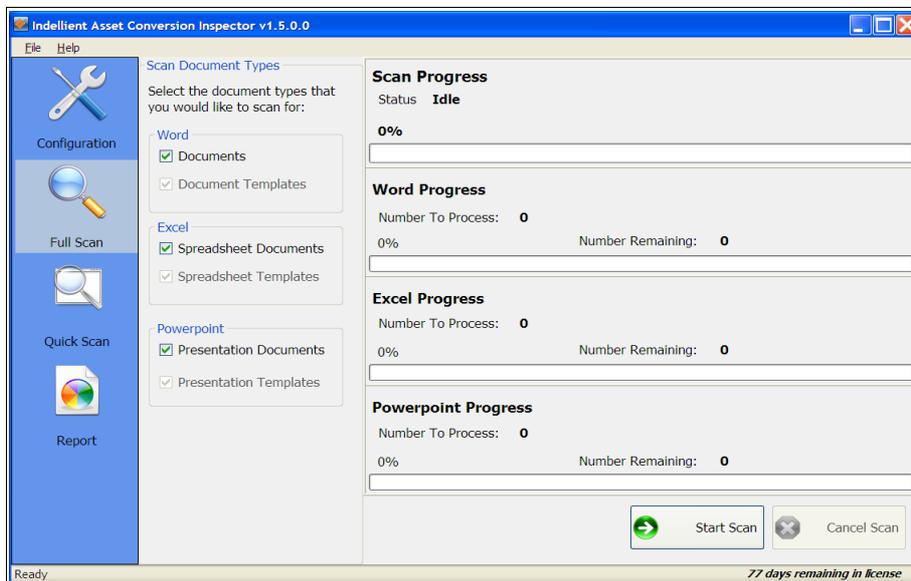


Figure 14 : Asset Conversion Inspector Full Scan Screen

Select the MS-Office components you want included in your scan (Word, Excel and/or Powerpoint).

Click the “Start Scan” button. A box will pop-up providing you with some pre-scan tips and with the scan settings for your scan. Pre-scan tips include:

- do not interact with any dialogue boxes during the scan. ACI will handle these for you.
- be sure to close all MS-Office applications before clicking 'continue'
- do not use any MS-Office applications until the scan is complete.
- please be sure you have enabled access to Visual Basic for all three MS-Office applications as documented in [Section 2: Installation Preparation](#) in this document.

Click 'continue'.

You can watch the progress of your scan as it runs as shown in Figure 15:

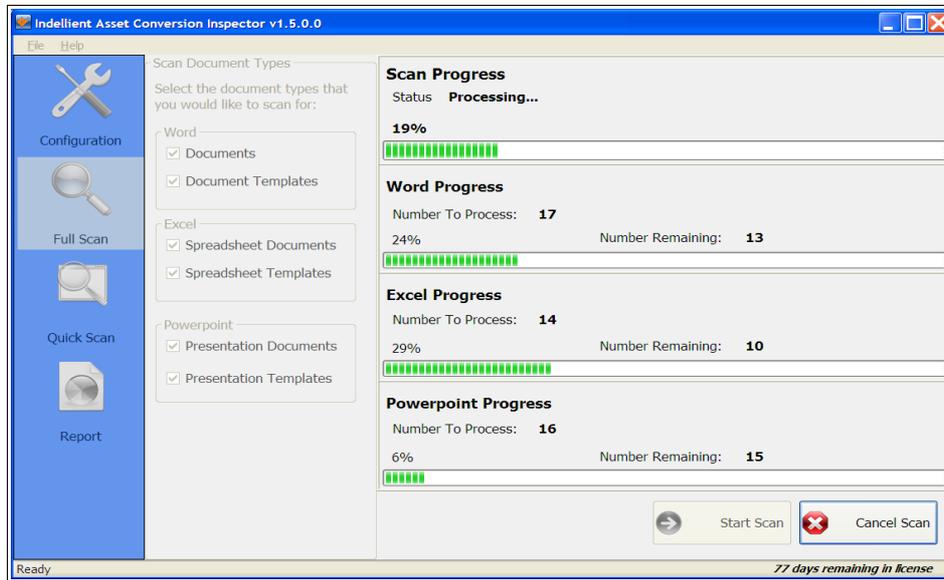


Figure 15 : Asset Conversion Inspector Scan Progress Screen

A pop-up box will let you know when the scan is complete.

To learn how to view the reports created by your scan, go to the [Reporting](#) section in this document.

1.Quick Scan Execution

A quick scan provides a file count by type for a directory and provides the user with a 'tree view' of the root directories scanned. Select the Quick Scan tab on the left of ACI to execute this functionality and you will receive the screen shown below in Figure 16.

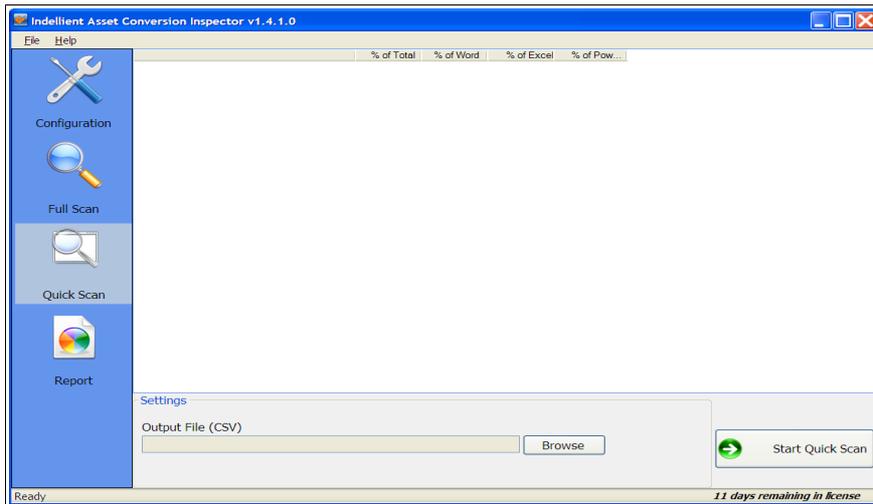


Figure 16 : Asset Conversion Inspector Statistics

To run a quick scan:

1. Complete the configuration screen. See [Configuration](#) help for further details.
2. In the Quick Scan tab, click on the 'browse' button to select a folder to store the output file and type in a file name.
3. Click on 'Start Quick Scan'.
4. The Quick Scan keeps a counter of files detected at the bottom of the Asset Conversion Inspector user interface.
5. Once the scan is complete, a 'Quick Scan Complete' dialogue will pop up with a summary of files found. See Figure 17 below.
6. To review the output file, click on the 'Open Location' hyperlink for the output file. The file will be opened in CSV format.

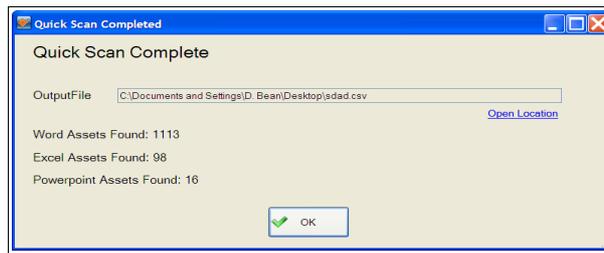


Figure 17: Quick Scan Complete Pop-up

The Quick Scan will also display a 'tree view' of files found and provide the user with percentage of total files found of each type in each root directory scanned. See Figure 18 below:

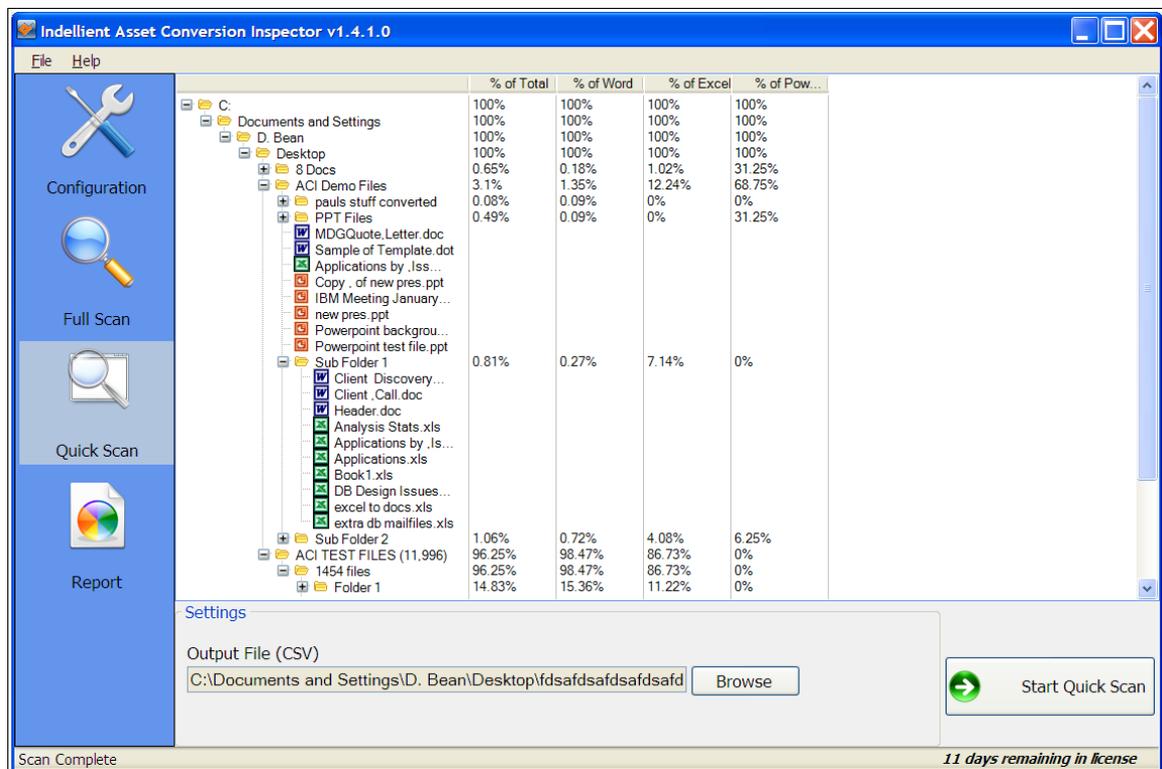


Figure 18: Quick Scan tree view of directories scanned

1. Reporting

To view the report screen, click on the Report Tab on the left side of your screen.

The report tab will launch and you will be able to pick the scan result on which to report, as well as the target version of IBM Lotus Symphony.

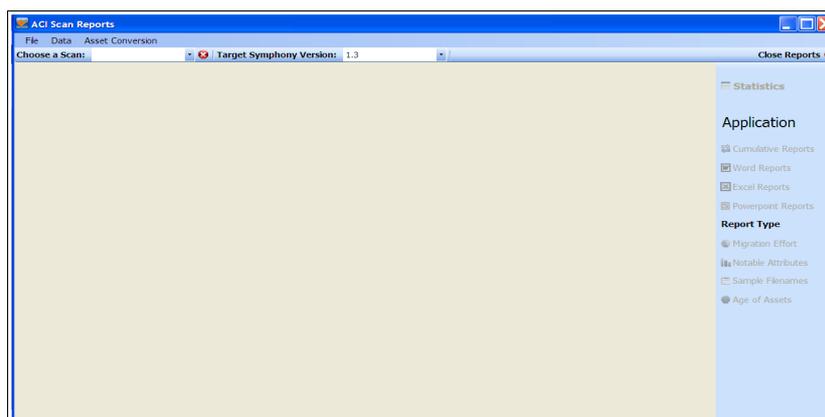


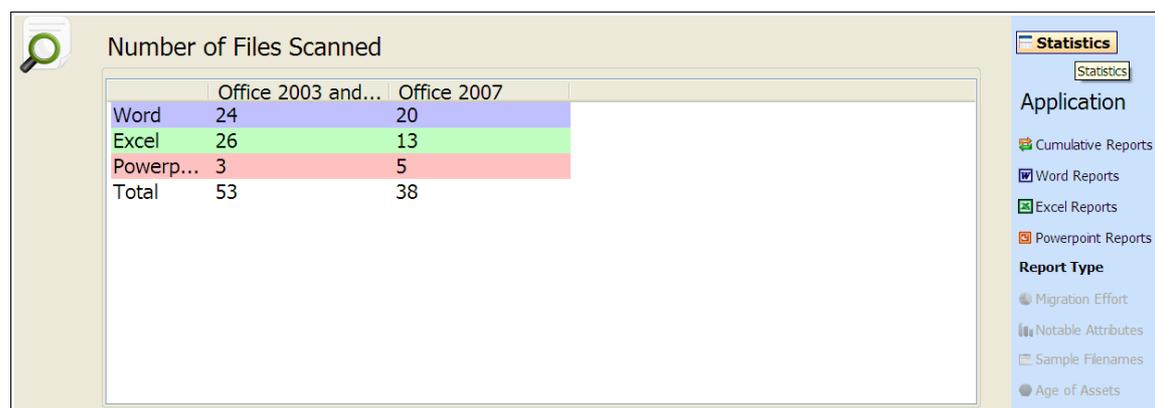
Figure 19 : Asset Conversion Inspector Report Screen

1. To begin, click on 'Choose a Scan' and choose the 'Project Name' for which you wish to create reports.
2. Select the Target Version of Symphony you want conversion effort analysis to be based on.

Once you select the scan and target version, the report options on the right side of your screen are no longer grayed out and you can begin looking at the various reports.

Statistics

The first option in the Report Toolbar is Statistics. This provides an overall summary of the files scanned, by application and version of MS-Office.



The screenshot shows a window titled "Number of Files Scanned" with a magnifying glass icon. The main content is a table with the following data:

	Office 2003 and...	Office 2007
Word	24	20
Excel	26	13
Powerp...	3	5
Total	53	38

On the right side, there is a sidebar with a "Statistics" button at the top. Below it, under the heading "Application", there are three options: "Cumulative Reports", "Word Reports" (checked), and "Excel Reports". Under the heading "Report Type", there are four options: "Migration Effort", "Notable Attributes", "Sample Filenames", and "Age of Assets".

Figure 20 : Statistics Report Screen

The rest of the available reports can all be displayed by application (Word, Excel or Powerpoint files) only, or cumulatively on all MS-Office Assets. There are four types of reports you can choose:

1. Migration Effort
2. Notable Attributes
3. Sample Filenames
4. Age of Scanned Assets

The following section provides examples of each.

Migration Effort

Migration Effort for Inspected Assets

The Migration Effort for Inspected Assets pie chart displays the percentage of files that:

- will convert seamlessly without user intervention
- may require user intervention
- will require technical support

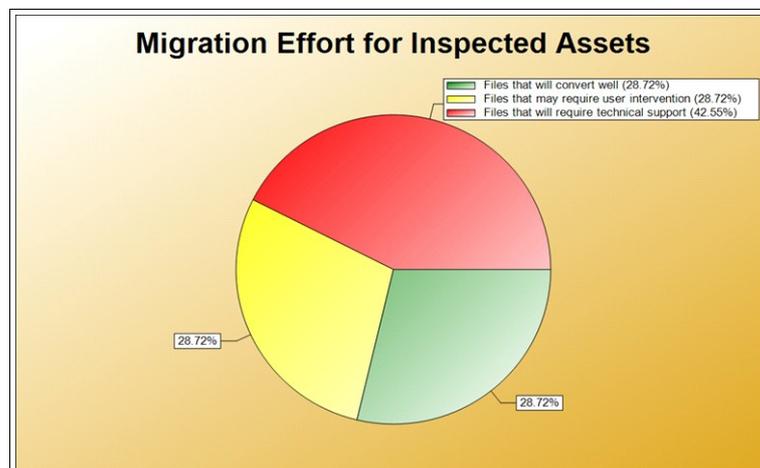


Figure 21: Sample Migration Effort for Inspected Assets Report

In this sample report, 28.72% of all MS Office files scanned will convert seamlessly to IBM Lotus Symphony without user intervention, 28.72% may require some user intervention and 42.55% will require technical support.

Notable Attributes

This report includes two graphs of the number of files containing notable attributes (defined as content with a file that will not convert seamlessly). One graph includes MS-Office 2003 or earlier files scanned and the second graph includes all MS-Office 2007 files scanned. Notable attributes include those attributes which will require user intervention or technical assistance when converting to IBM Lotus Symphony. An example of this report is shown in Figure 22:

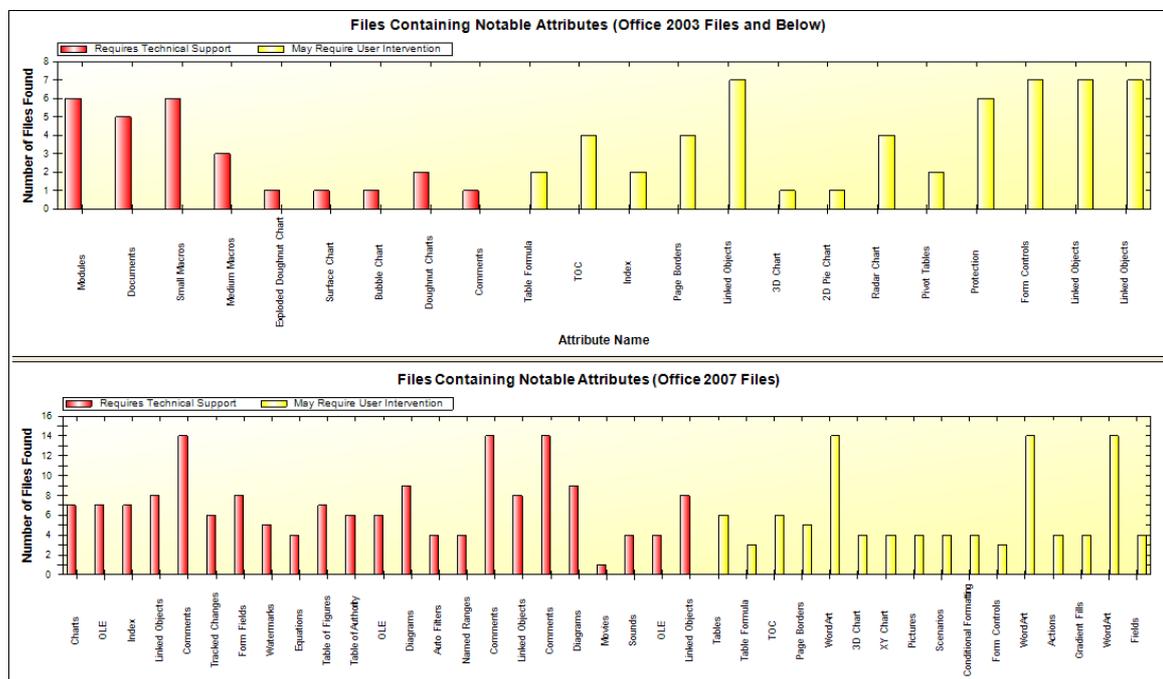


Figure 22: Sample Notable Attributes Report

Sample Filenames Report

The Sample Filenames report provides the file path and name for assets which contain attributes of note. The list is not exhaustive (5 sample file names for each notable attribute for both 2003 and earlier and 2007 files), but provides the user with a good list of examples that can be used for further analysis and to understand the nature of the particular migration challenge.

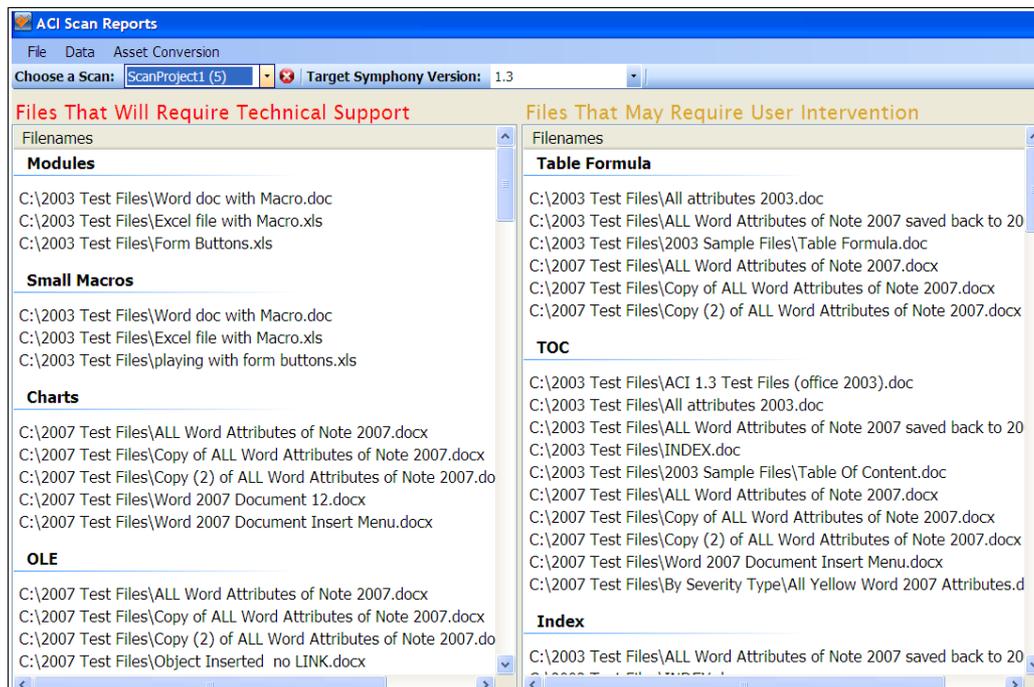


Figure 23: Sample Filenames Report

Age of Scanned Assets

The Age of Scanned Assets Bar graph displays the ages of the scanned assets by year. The user can request a bar graph for all assets scanned or by individual application.

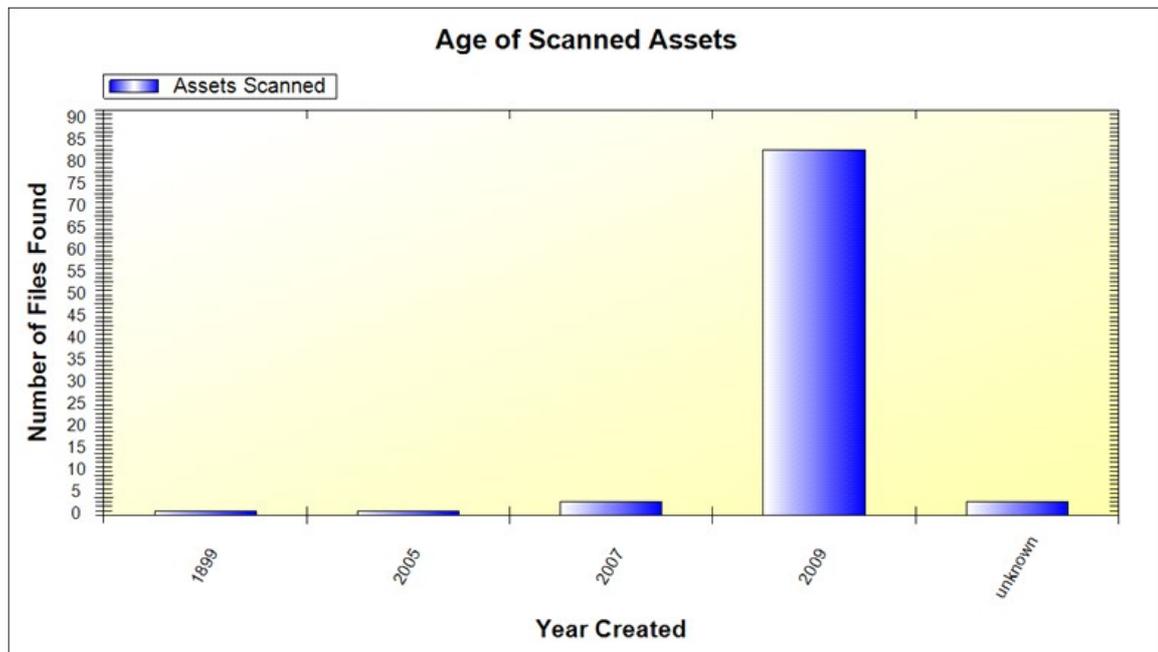


Figure 24: Sample Age of Scanned Asset Report

Report Export

Migration Effort, Notable Attributes, Age of Scanned Assets

To export a copy of the Migration Effort, Notable Attributes or Age of Scanned Assets report, simply right click on the report, and you can either 'save as' and choose your graphic save format, or you can copy and paste the report into a word document.

Statistics and Sample Filenames Report

There is no export available, but these reports can added to another document as a screen capture.

Data Export

The data captured during an ACI scan is stored in a 'Data' folder in the application directory. The files containing information related to scan activities include:

- Event Logs for each Office application
- CSV files (one for each application) containing details of all assets scanned
- CSV files (one for each application) containing a list of all OLE types found
- A general log of scan events

The Indelligent Asset Conversion Inspector provides the capability to export these raw files to a folder for further analysis. To export your scan data, complete the following:

From the Report Tab, choose Data/Raw Export:

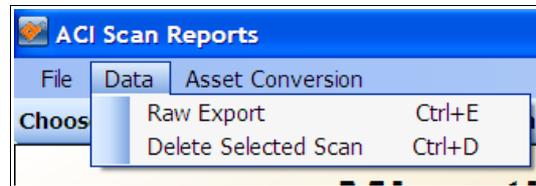


Figure 25: File Export Menu Option 1

The Export Scan Information dialogue is displayed:

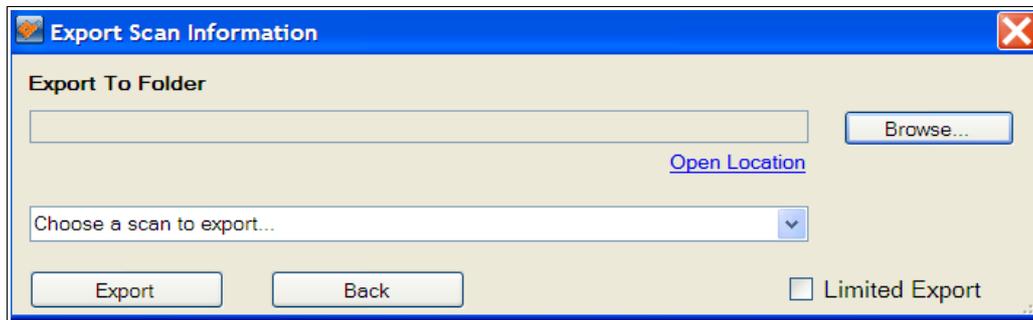


Figure 26: File Export Sub-Menu

Choose a target folder for the data and select the Scan Name from the drop down menu and click on 'Export'. All files will be exported to the folder you selected.

Limited Export

In some organizations, the actual file names and authors for the assets scanned are considered confidential information. This can be problematic if the scan results are to be shared with individuals who are not authorized to see this information, either inside or outside the organization. To address this problem, the Limited Export option is provided as seen in Figure 26. When this option is selected all results are exported without either file or author names.

1. Troubleshooting

This section contains a list of the most common challenges that users can experience when installing and executing the Indelligent Asset Conversion Inspector.

Issue: The scan reports are blank.

Resolution:

Confirm that MS Excel, Powerpoint or Word documents were present in the directories scanned. If documents were present, verify that the security settings, as outlined in the [MS Office Configuration](#) section, have been configured correctly for MS Excel, MS Powerpoint and MS Word. If the security settings were configured properly, please contact Indelligent for further support.

Issue: Every file scanned results in 'ERROR 5732 - "COM Error"'

Resolution: Confirm that MS Excel, Powerpoint and Word have been configured properly. Follow the instructions in the [MS Office Configuration](#) section.

If you experience any technical problems during the install or scan execution, please contact:

ACI.Support@indelligent.com
1-905-814-7707 x234

2. Appendix A – Uninstall Instructions

To un-install the Indelligent Asset Conversion Inspector, please follow the steps below:

1. Click on “Start”, “Control Panel”. See Figure 27:



Figure 27 : :Start/Control Panel

2. Select 'Add or Remove Programs'. See Figure 28:

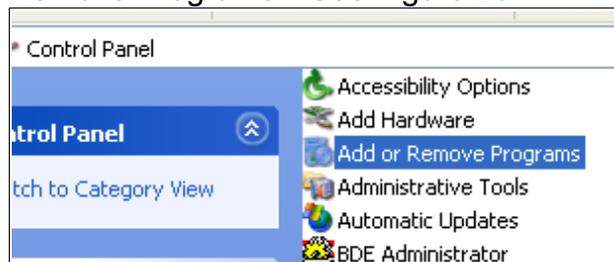


Figure 28: :Add or Remove Program Option

- Find and select the 'Asset Conversion Inspector' program. Click on 'Remove'. See Figure 29:

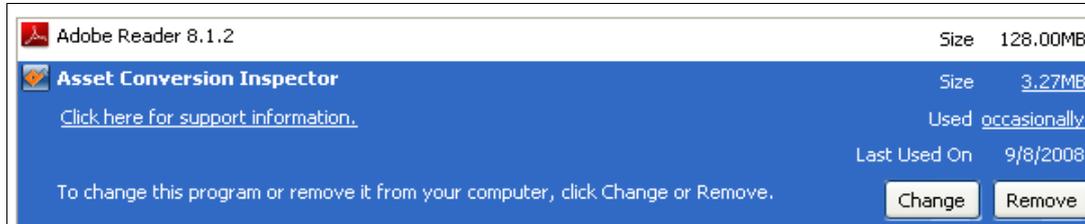


Figure 29: Remove Program

The program will be un-installed.

- Remove residual files by deleting the 'Indelligent/Asset Conversion Inspector' folder from C:\Program Files. See Figure 30:

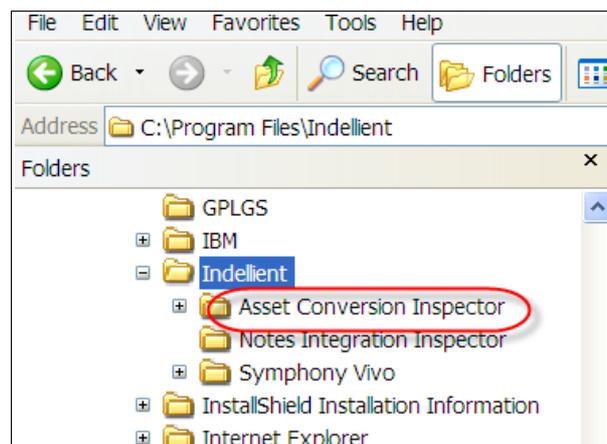


Figure 30: Deleting Residual Files

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