Office 2016: Next Steps

By Thomas G. Stephens Jr., CPA, CGMA, CITP

T hough it's been months since Microsoft made Office 2016 available to the public, many individuals and organizations have yet to adopt the new suite of desktop productivity applications. For some, it is a matter of waiting on an Information Technology (IT) staff to give the green light. For others, it is a matter of the perceived time and hassle associated with upgrading, including determining whether investing in a new computer and/or Windows 10 is necessary. Still, for others, it is a matter of determining whether the new features are worth the cost of upgrading.

Regardless of where you might fall into this "upgrade spectrum," read on and you will learn what next steps might be best for you and your team regarding Office 2016.

First, the Features

In my opinion, we should view expenditures on technology not as "expenses," but rather as "investments." If we adopt this mindset, we should seek to maximize our return on investment (ROI) in technology and, relative to Office 2016, this translates into determining whether the new features will be useful to us and our team members.

While not intended to be an all-inclusive list of new and improved features in Office 2016, following are some of the ones that are likely to provide the greatest ROI to business users.

- **Co-Authoring in Word and PowerPoint.** Using this feature, multiple users can access and edit Word documents and PowerPoint presentations simultaneously, facilitating real-time collaboration.
- **Clutter in Outlook.** Outlook's new Clutter feature learns how you work with your email and places low priority messages in a separate folder, allowing you to stay focused on the most important items of the day.
- **One-Click Forecasting in Excel.** With one click of the mouse, you can forecast based on historical data, including identifying 95 percent confidence intervals. Many business professionals will find this feature to be very useful when performing budgeting tasks.
- **Six New Chart Types in Word, PowerPoint and Excel.** Six new chart types – histogram, treemap, waterfall, Pareto, box and whisker, and sunburst – are available to help you transform raw data into more meaningful and actionable information.
- **Improved Version History in Word, PowerPoint and Excel.** If you store Word, PowerPoint or Excel data in SharePoint or OneDrive for Business, you can look at prior versions of your documents and even restore a prior version, if necessary.
- **View and Edit across Multiple Devices and Multiple Platforms in Word, PowerPoint, Excel, OneNote and Outlook.** Most Office 2016 applications are now available across multiple platforms – Windows, iOS, Mac and Android – meaning you can access your tools and your data regardless of what device you happen to have in your hands at any point in time.

In addition to the new features outlined above, and many not listed here, if you upgrade to Office 2016 from Office 2010 or prior, all of the enhancements made to Office 2013 will appear to be new to you. Key among these are the following:

- The ability to open and edit PDF documents in Word;
- Recommended PivotTables and Charts in Excel;
- Excel's Flash Fill tool;
- A drastically improved Presenter View in PowerPoint;
- Slicer filters on Tables in Excel;
- In-line replies to email messages in Outlook; and
- Business intelligence tools, including Data Models, Power Query and Power Map in Excel.

Clearly, for those who choose to upgrade to Office 2016 – particularly if upgrading from Office 2010 or prior – a wealth of new features mean that the opportunity exists to realize a substantial ROI.

What About the Hassle? What About the Hardware? Must I Also Upgrade to Windows 10?

Because upgrades to Office 2016 utilize click-to-run technology, most upgrades from an existing version of Office take only a few minutes to complete; in fact, my upgrade from Office 2013 completed in less than 10 minutes. Further, because the user interface is largely the same as it was in Office 2010 and newer, most users will likely not experience any significant "learning curve" and should be able to get to work right away in Office 2016. Additionally, Office 2016 identifies key settings in your current version of Office and carries these over to the new environment. All told, the hassle associated with the upgrade is virtually non-existent.

Because Microsoft released Office 2016 just two months after Windows 10, there is some confusion in the marketplace about whether Windows users must upgrade to Windows 10 prior to upgrading to Office 2016. The short answer is "no." In fact, Windows users need only to have Windows 7 Service Pack 1 installed on their computers to run Office 2016.

Other key system requirements include a 1GHz or faster processor, 2 GB of RAM and 3 GB of hard disk space available; however, Mac users will need 4 GB of RAM and 6 GB of hard disk space available in order to upgrade. In other words, if you have a computer that is less than five to seven years old, there is a very strong likelihood that it has the "horsepower" to run Office 2016.

Why Is My IT Staff Dragging Their Heels?

Many end-users get frustrated by the seemingly slow responses from IT staffs when upgrades such as Office 2016 become available. However, keep in mind that IT staffs must ensure that an upgrade does not cause problems elsewhere and to do this, thorough testing is often necessary in corporate environments before upgrades roll out en masse.

One particular Office 2016 issue that many IT staffs are struggling with is how Microsoft plans to push security and feature updates to Office 2016 users. More specifically, your organization obtains Office 2016 through an Office 365 subscription plan so your IT staff must

wrestle with what Microsoft deems "Current Branch" and "Current Branch for Business" update models. If you are in the Current Branch model (which includes Office 365 Business and Office 365 Business Professional subscribers), you will receive monthly updates, which can include security patches, bug fixes, and new and improved features. You can choose not to deploy an update, but if you do so, you will not receive future security updates.

If you are in the Current Branch for Business model (which includes Office 365 E3 and E4 subscribers and Office ProPlus subscribers), you will receive monthly security updates and feature updates every four months. If you are in the Current Branch for Business update cycle, you can choose to defer updates for up to eight months, but must accept them at that time or you will no longer receive security updates.

While many businesses – particularly smaller ones, with relatively straightforward computing applications – will benefit from this new support methodology, larger businesses may face challenges with the mandatory updates and their potential impact on other applications that integrate with Office 2016. For this reason, many IT managers are currently taking a wait-and-see approach to Office 2016, especially if they are considering deploying it through an Office 365 subscription plan.
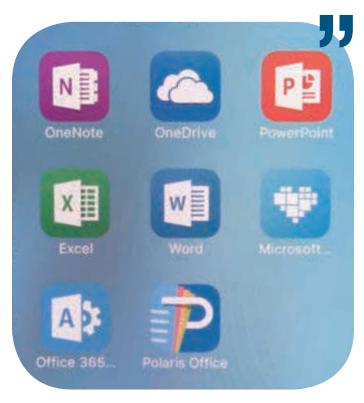
Your Next Steps

Given all that you read above, what are your next steps? For many individuals and small business users, taking the plunge and moving forward as soon as possible will pay significant dividends, particularly if you are upgrading from Office 2010 or prior. Further, if you are already running Windows 7 or newer, the upgrade to Office 2016 should be relatively fast and painless, and likely will not require hardware upgrades.

However, if you integrate Office 2016 with other applications – for example, exporting financial statements into Excel – you should first test to ensure that these integrations continue to work before upgrading your entire team. In larger organizations, this testing strategy is likely to take some time. Couple that with the uncertainty surrounding mandatory

> ## IT IS A MATTER OF DETERMINING WHETHER THE NEW FEATURES ARE WORTH THE COST OF UPGRADING.

updates in Office 365 environments and we may find that Office 2016 upgrades for these organizations are still some time away. ∎

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