
Vision and Scope Document

for

Network Infrastructure Upgrade

Version 1.0 approved

Prepared by Alex Cannon, Denham Miranda, and Jim Patterson

SmartAccounting

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Revision History

Name	Date	Reason For Changes	Version
Jim Patterson	10/1/09	Creation of Business Requirements Section (1)	1.0
Jim Patterson	10/6/09	Creation of Human Resources Section (5)	1.0
Alex Cannon	10/6/09	Creation of Vision of the Solution Section (2)	1.0
D. Miranda	10/7/09	Creation of Scope & Limitations section (3)	1.0
Alex Cannon	10/9/09	Creation of Business Context section (4)	1.0
D.M./A.C.	10/10/09	Creation of Project Management Section (6)	1.0
D. Miranda	10/10/09	Creation of Educational/Program Outcomes Section (7)	1.0

Business Requirements

SmartAccounting has a corporate office in Columbus with about 60 employees and a satellite office in Cleveland. The Cleveland office has about 40 employees. SmartAccounting is a private corporation created that offers full accounting services including bookkeeping services, payroll services, tax returns and preparation, business consultation and overseeing of auditors of public companies. The goal of SmartAccounting is to protect investors and the public interest by promoting informative, fair, and independent audit reports and accounting services.

Background

Currently, the SmartAccounting Group has a very limited IT infrastructure. They are using outdated technologies such as dial-up modems and 10Mbps hubs to accomplish basic tasks like email and word processing. The SmartAccounting Group's current IT infrastructure also stifles growth and prevents business expansion due to its inherently limiting nature, further necessitating a technology upgrade. The establishment of an efficient up to date internal network in the home office and satellite office is our number one concern. Both network infrastructures need to be upgraded and wireless access needs to be installed. The overall goal is to make file sharing for projects easier and centralized through technologies such as VPN tunneling and IPSEC encrypted communications. Currently, most of the company's files are maintained and stored locally for each user and employees email files back and forth for updating.

Business Opportunity

With the affordable price of broadband Internet and wireless technology, the company should upgrade its systems to conform to modern standards and expectations. The proposed project will also include updating existing hardware such as PCs, software, and printers to a more modern environment as well as adding a central server for document storage. This will provide improved communication between employees and the offices. Additionally by storing documents in a central location SmartAccounting will be able to provide restorative services to employees and prevent loss of knowledge upon employees leaving.

Additional benefits

- Reduction in the cost of doing business
- Improvement in business relationship
- Reduction in errors
- Improved communications
- Increased efficiencies and productivity between employees
- Improved customer service

Business Objectives and Success Criteria

The objectives of the project are as follows:

- Establishment of a secure wireless network in each office.
- Establishment of high speed network connections at each office.

- Establishment of a VPN tunnel between offices.
- Establishment of a central data storage server.

Success Criteria

- Deadline: Complete by February 26, 2010.
- Budget: \$30,000 +/- 10%
- Employee Satisfaction Survey
- Sponsor Satisfaction Survey
- Quality Evaluation

Customer or Market Needs

- Customer expectations
 - Competent, efficient, professional service
 - Accurate results
 - Knowledgeable staff
 - Honesty
 - Feedback
 - Reliability
- Market Needs
 - Competitive prices
 - Accurate results
 - Reliability
 - Brand recognition
 - Proven track record

Business Risks

- Schedule
 - Unscheduled changes
 - Unscheduled delays
 - Reliance on external resources
- Equipment
 - Equipment availability
 - Shipping delays
- Project Team
 - Expectations
 - Lack of knowledge
 - Quality control
- Implementation
 - Data loss
 - Hardware/software failures
 - Integration

Vision of the Solution

SmartAccounting vision is to provide increased security to the corporate IT infrastructure with the ability to work from customer locations as well as satellite offices.

Vision Statement

The network upgrade will allow for continued customer growth while providing a flexible work environment for current employees. SmartAccounting's IT infrastructure will provide a fast, secure, and current data environment. The ability to update, review, and submit reports and projects from any location will provide a cost savings that will allow for company growth and customer cost savings. Costly mistakes will be eliminated due to individuals storing multiple copies of files locally. Users will access and update the same projects files from one location. SmartAccounting will become a smarter, faster, and accurate accounting firm.

Major Features

- VPN Access.
- Centralized file storage.
- Wireless Connectivity.
- Increased Bandwidth.

Assumptions and Dependencies

Assumptions include that all technology products needed to complete the upgrade will be available when ordered and working correctly on arrival to each location. Systems and Network administrators are capable of completing all require setup and configurations of equipment. ISP will be able to complete install on schedule.

Scope and Limitations

This project will be limited to the original functionality and requirements set forth by SmartAccounting and should not be taken out of context. While the project is intended to provide a fast, secure method of communication within each site and between, we cannot foresee any extraneous circumstances in which these limits may be modified. Whether they are a part of the initial release, or subsequent, an open channel of communication will address these when these concerns do arise.

Scope of Initial Release

The initial release will include state of the art Cisco routers and wireless devices along with the best suited high speed internet available geographically. Since both locations, including the remote location in which SmartAccounting personnel travel to have access to broadband coverage, the chosen broadband package would ideally address current and future growth within the organization. This is vital to the business as SmartAccounting is in fact growing in customer demand.

Along with broadband arises issues in security and to address them, VPN tunneling along with IPSEC protocols will be deployed for both regional and satellite workers. This will ensure that the communication is effective and secure at the same time.

Storage solutions will come as centralized file server architecture and much like the broadband would be designed in such a way that it has the capability of meeting future demands. Furthermore, the hardware and software solutions for this architecture will be designed with scalability and security in mind.

Scope of Subsequent Releases

Currently, SmartAccounting foresees future expansions to its wireless, VPN and storage networks and plans on addressing them during on a case by case basis. This is partly due to the initial release covering majority, if not, all its intended solutions.

Limitations and Exclusions

The planned architecture would be designed to function with minimal downtime and increased productivity. This in mind, there are unforeseen actions that could ultimately hamper productivity. In many cases, this is beyond control of intended plan. Some of these limitations are noted below:

- No secondary fall back will be designed as the primary network will be on a high availability channel.
- Remote/Offsite users will have to choose whatever communication method is available to connect to the corporate network. This includes dialup in area's where broadband is not available. These users understand the significant drawback in performance with this method

Business Context

Business issues around the project include the availability for remote access to network and data. SmartAccount envisions the upgrade to rectify these issues. SmartAccounting is assuming the upgrade will provided a more secure and reliable IT infrastructure. This is a top priority from the owners.

Stakeholder Profiles

SmartAccounting employees will see increase improvement in all daily computer related task. The upgrade will relieve many headaches associated with the current process of completing projects, such as document availability, current data, and duplication of effort.

- improved productivity
- reduced rework
- cost savings
- streamlined business processes

Stakeholder	Major Value	Attitudes	Major Interests	Constraints
Owners	Increase in Customers	Sees increase in turnaround time on projects.	Ability to work from any location. File security.	Maximum budget = \$33,000
Accountants	Fewer errors in work. Cut down on duplicated work.	Likes remote access. Learning curves about network file access.	Up to date access to central file storage, Wireless connectivity.	Must be connected to network to access data. Not allow to store data locally.
Customers	Fewer errors in reports	Likes ability for accountants to work from their location.	Data protection. Cost Savings	Network Access.

Project Priorities

Dimension	Driver (state objective)	Constraint (state limits)	Degree of Freedom (state allowable range)
Schedule	Installation must be completed by February 26, 2010.	Access to building during off hours.	Maybe granted off hour's access for physical construction with 2 day notice.
Features	User friendly network environment.	User's computer abilities.	
Quality	All equipment and cabling must be hidden.	Building design.	May forgo hiding cable if causes budget increase or completion dates change.
Staff	System Engineer, Network Engineer, and Project Leader.	3 team members.	All 3 team members can change an area of the project as long as the change does not constitute a design or product change.
Cost	To deliver the highest quality product to meet the customer's needs.	\$30,000.	Budget overrun of %10 is allowed without customer approval.

Operating Environment

- The users are currently operating at two locations. The central of and a remote office.
- The users need to be able to access the systems at any given time, primarily during normal working hours and occasionally during off hours as needed.
- Reports and project data are currently created at both locations and by traveling personal.

- Support personal needs access to reports and project data to produce proposals and customer reports.
- Network availability is mission critical for the remote office and traveling personal.
- VPN security and network security need to be in place.

Human Resources

This section summarizes some of the human resources issues around the project, including the organizational structure of the team, conflict resolution procedure, process for team member removal, the technical skills and attributes of each member, the roles and responsibilities that each member will perform, and the strategies you will use to communicate with one another.

Team Charter

Team Organization

- Alex Cannon – Team Leader
- Denham Miranda – Team Proof Reader
- Jim Patterson – Team Member

Decisions will be made with team consensus. The team leader will be responsible for submitting deliverable as well as resolving any internal conflict.

Any team member who does not live up to the expectations of the team goals will be removed from the team and made to do their own project starting at that point forward.

The following steps must be taken in order to remove a team member

- Warning notification of possible removal sent to team member with CC sent to instructor. Including reasoning.
- If no rebuttal is received from team member within 24 hours, removal is processed.
- Rebuttals will be taken into consideration with instructor's input.
- Second warning of removal will constitute automatic removal from team without rebuttal.

An agreement between the other two members must be reached for the removal process to begin.

Technical Skills and Attributes

Name	Skills	Attributes
Alex Cannon	Network Administration: Citrix Administration, Project Management, Cisco Administration.	Determined, organized, motivated.
Denham Miranda	Database Administrations, Network Consultant, Security Consultant	Extroverted, organized, detailed.
Jim Patterson	Server Administration: Exchange and SQL, Disaster recovery, Windows Server Administration.	Introverted, organized, detailed.

Roles and Responsibilities

Name	Role	Responsibilities
Alex Cannon	Project Leader	Oversees project and communicates directly with client.
Denham Miranda	Network Consultant	Consults on file and network architecture.
Jim Patterson	System Administrator	Oversees file server configuration and setup. Creates disaster recovery plan and backup plan.

Communication Strategies

Communication Tools

- Email
- Phone
- Franklin Live meetings on an as needed basis.
- Microsoft Office Live

Responses are expected within a 24 hour period.

Project Management

The project schedule and completion of milestones rely heavily on each team member's ability to balance their workload with other course projects and assignments. With each member located in different locations the ability to communicate and use the available tools is top priority for the success of the project. Any changes to the project must be communicated and documented for team approval. It is vital for the project manager to communicate clearly with customer (professor) and relay all requirements, changes, and approvals to the team.

Deliverables

The design team would use Microsoft Office Live to collaborate and share design documents in all stages of the process.

Stage 1: Planning

- Review overall project criteria
- Discuss available options and methods
- Research best solution for both hardware software solutions
- Prototyping

Stage 2: Designing

- Network design
- Storage solutions design
- Security options & other considerations
- Naming conventions
- Initial configuration rollout
- Other considerations from end users

Stage 3: Documentation

- Project plan
- Network diagrams
- Disaster recover/mitigation plans

Dependencies

The overall project consists of items that contain dependencies in different stages/timelines. Most of these items are listed below:

- Network design will not begin until all stages until prototyping are complete
- Initial configuration will not begin until all stages of the design criteria (network, storage, security) are identified and tested
- Final signoff of project would not be performed until all aspects of the project has been documented and tested

It is vital to note that this dependencies can & may change based on on-going business needs. In an event that this does occur, proper identification and notification would be given to all stakeholders of the project.

Schedule

SmartAccounting has agreed to follow the schedule (noted below) on a preliminary basis. It is also understood that extraneous circumstances can & may change these timelines but with adequate notification and planning considerations.

Title	Location	Start time	End time	Description
Project Proposal Due		9/23/2009 4:30	9/23/2009 20:30	
Project Vision and Scope		10/4/2009 9:00	10/4/2009 9:30	worth 150 points
Project Status Report		10/12/2009 9:00	11/1/2009 9:00	worth 100 points
Project Whitepaper		11/2/2009 9:00	11/15/2009 9:00	worth 100 points
Project Write Up		11/16/2009 9:00	12/13/2009 9:00	worth 200 points
Peer Evaluation		12/13/2009 9:00	12/13/2009 9:30	
Finial Project Presentation		12/19/2009 9:00	12/19/2009 9:30	worth 100 points
Capstone Debrief		12/19/2009 9:00	12/19/2009 9:30	worth 25 points

Educational/Program Outcomes

The successful completion of this project would enable SmartAccounting to be in line with today's technology not only making it more competitive, but more reliable and cost effective as well.

General Education

This completed project will enable Team4 to reach the following goals:

- Communicate effectively and quickly regarding planned/unplanned changes with multiple tools for communication.
- Approach organizational problems with the customer requirements in focus and offer a cost effective solution.
- Apply critical thinking processes and multiple scenarios to evaluate the changing conditions of the problem at hand, and offer the best possible solution for the end user, or offer alternatives.

Information Technology

This completed project will enable Team4 to reach the following in regards to IT:

- Approach and document the given problem in a Project Management thought process
- Apply learning fundamentals from all major classes to formulate a solution that encompasses network design, database and security considerations.
- Apply current industry best practices including considerations to government mandates & recordkeeping.
- Use Systems Development Cycles to effectively communicate and meet the requirements of the end users at every stage of the project.

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