

ITEC 495 V2WW

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Assignment 1-3-2: Capstone Project: Project Vision and Scope

Professor Wayne Smith

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Vision and Scope Document

for

SharePoint Deployment

Version 1.0 approved

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Team B Consulting

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Revision History

Name	Date	Reason For Changes	Version
David Marks	9/28/09	Created Title Page and Business Requirements Sections	0.1
Amber Painter	9/28/09	Compiled section 2 and 3 into rough draft format	0.2
			0.3
Amber Painter	9/29/09	Revised section 2 and 3	0.4
Garett Latham	9/30/09	Created section 4	0.5
David Marks	10/1/09	Created section 5	0.5
Amber Painter	10/1/09	Modified section 2, modified date changes in section 3, and removed table. Added appropriate team content attributes into section 5	0.6
David Marks	10/7/09	Added Section 6 schedule per our meeting discussions, but also had to change dates as it appears the wrong calendar was used when originally planning project date	0.7
David Marks	10/8/09	Fleshed out Section 5 details per group discussion	0.7b
Amber Painter	10/9/09	Revised Section 2 and created Section 8	0.7c
Garett Latham	10/9/09	Completed Section 4 and half of Section 7.	0.7d
Amber Painter	10/10/09	Consolidated Section 4 and half of Section 7, into the existing 0.7c	0.8
Garett Latham	10/10/09	Completed Section 7	0.9
Amber Painter	10/10/09	Revised completed document and updated revision history	0.9b
David Marks	10/10/09	Proof read document and make small adjustments to wording.	0.9c
Garett Latham	10/11/09	Adjusted Section 4 content based on group comments	0.9d
David Marks	10/11/09	Adjusted timing in Section 3 to match Section 6, adjusted page-numbering format, and added cover page to match professor requirements.	1.0

1. Business Requirements

Acme Technical College, a small school with roughly 5000 students, is outsourcing a project to improve their IT support operations. The department serves the student population as well as the faculty of the campus. They provide support for all campus computer systems, web sites, and network access.

1.1. Background

The department was recently denied a request to hire additional staff and needs to become more efficient with the staff it currently has. Due to recent budget cuts, the college would also like to use free software that can be implemented into their existing Microsoft Active Directory environment.

1.2. Business Opportunity

SharePoint provides a free, easy to use, highly customizable platform through which many business processes can be automated or improved. The problems the department is facing with staffing shortages and slow processes allow a SharePoint installation to improve the performance and effectiveness of the staff. The deployment of the project can occur on existing servers and be performed very quickly.

1.3. Business Objectives and Success Criteria

The IT department must operate more efficiently than is currently occurring. This project is designed to lower the administrative effort for the department through management of the helpdesk, resource scheduling, and self-resolution of common IT problems for users.

Once the SharePoint server is chosen and the site is designed, the staff will require training to utilize the site fully. This training will allow them to use the site to improve their processes and begin recording and entering information. After the staff receives their training, they will be able to help other users begin to use the site for resource reservations and simple problem resolutions.

The deployment of SharePoint will result in fewer helpdesk calls for simple problems, faster problem resolution of help desk tickets, and no IT staff time will be spent scheduling resources. Re-occurring problems can be tracked, recorded, and resolutions can be easily found as the knowledge base grows.

1.4. Customer or Market Needs

The majority of the department's time is spent managing help desk tickets, resolving conflicts with computer lab scheduling and resolving problems because previous solutions were never documented. An intranet site such as SharePoint can automate and track help desk tickets, eliminate the paper based reservation system for the school computer labs, and provide a searchable knowledge base that technicians can use to track and record problems and solutions. The site can also include pages where staff can find answers to common questions.

1.5. Business Risks

There are few risks presented with this project. Change always meets resistance within an organization. There is a low risk of resistance from the staff to use the new system. The transition time from the current paper-based system to SharePoint presents a risk if the staff does not accept the training or adapt to the new system.

The SharePoint site would be implemented on an existing server that will be chosen for its available resources to dedicate to the project. It is possible that the server could become overwhelmed by the traffic the site will generate.

2. Vision of the Solution

Team B's project will enable Acme Technical College to improve and automate IT helpdesk tasks to both faculty and students.

This will also allow the company to establish a corporate intranet that uses secure usernames and passwords. The primary focus of the solution is to provide an internally based site for the IT helpdesk to manage and support the operations of the helpdesk. This website will be easy to use and also allow faculty and students to have a limited amount of access and resources to the database.

The proposal will provide the ability to implement a SharePoint portal, which will allow users to organize and share information. This portal will serve as a location where information and applications can be accessed by users via their web browser. The IT help desk will be able to manage trouble tickets and store a knowledge base for problem solving. Faculty and students can access this portal from any location that has access to the SharePoint Portal Server computer through the university's intranet.

2.1. Vision Statement

Acme Technical College seeks to increase our productivity and time to resolution due to the integrated Knowledge Database and help desk ticketing manager. Our goal is to use a systematic approach to ticket management that will decrease the amount of time required to resolve each helpdesk request. The primary intent for an automated help desk system will allow us to easily manage, organize, and archive all help desk support requests and responses in one place while providing our students and faculty with the accountability and responsiveness that they deserve.

2.2. Major Features

- Manage information
- Share files
- Collaborate calendars, event lists and task lists
- Customization
- Provides data archives for instant retrieval
(Microsoft Corporation)

2.3. Assumptions and Dependencies

Resolving the current conflicts such as computer lab scheduling and technical problem documentation will allow the IT department to operate much more efficiently. By implementing an intranet site, it will provide additional management tracking capabilities for the help desk. A search can be conducted to look up a specific ticket number or user login name. There will also be a place to look at the details of the request and see the date and time a request was modified and by who requested the changes. The intranet site will also have categories for the criticality of each help desk request and the issue will be escalated to the appropriate tier level. The documentation of each dilemma within the university will be easy to create and search in a less time consuming manner. We expect to notice a significant change in the time to resolve all helpdesk requests as the knowledge base grows. We expect to notice a significant optimistic change for time in which will be involved in resolving all helpdesk requests. This method of a well-designed organizational setup will be easier for everyone who at Acme Technical College.

3. Scope and Limitations

This project will be setting up the SharePoint server to assist with managing documentation effectively as well as provide a place for users to find and request technical help.

This project will be limited to a report that will provide detailed documentation for the installation of a SharePoint server deployment with limited access to database resources. The documentation will include the training for all IT staff and users of the site.

The intranet and database will be implemented together; however, user access will be limited to documentation requests.

3.1. Scope of Initial Release

The initial SharePoint deployment is anticipated to include all major features listed below.

The first 5 weeks (October-November 2009) deliverables:

- Documentation of the old system functionality using Data Flow diagrams, a data dictionary, use cases, and any other method found necessary or useful.
- Installing server installation
- Setting the server's initial configuration
- Configuration of site features
- Management will review these documents of system functionality.

The second and third month (November 2009 - December) deliverables:

- Appropriate security permissions for users
- Identity & Access Management optimization level allows the ability to use Active Directory

- Ensure access control lists and keyword control properly implemented.
- User testing
- System documentation
- Training design
- Usability testing and optimization
- Final release

3.2. Scope of Subsequent Releases

Deliverables deferred in the initial release include

- Search archiving/indexing
- Specific areas and topics
- Document collaboration
- Site directory area
- Student and faculty portals

3.3. Limitations and Exclusions

- This project is strictly focused on the needs required to create a secure user-friendly interface and stable environment for the deployment of a SharePoint server.
- It is difficult to determine the storage needs and the hardware solution.
- There is no possible method to determine the hardware requirements for a given solution since the demands that a Web site makes on its servers are the result of a complex interaction involving several factors.
- According to the limitations given above, the initial deployment will require relatively low resources and will thus be implemented on an existing server.

4. Business Context

Providing technical support is an expensive part of any organization. It is important to make a support environment as efficient as possible. By striving to improve performance and efficiency of the systems used by support technicians, resources can be more properly allocated to increase revenues and cut costs. Fortunately, the predominant customer profile is that of an end user who requires desktop support. Desktop support is an area that technicians will be trained in beforehand, and very few resources will need to be allocated for retraining the help desk staff. From a management perspective, the SharePoint/Intranet solution will remove most of the human element and inefficiencies of prioritizing support ticket requests. In addition, the ability for technicians to utilize a well-documented knowledgebase will reduce waste associated with improperly troubleshooting -- thus freeing up potential labor that can be reinvested and lessen the need for hiring more technicians.

Stakeholder Profiles:

The largest Stakeholder in successfully deploying a more streamlined IT support operation is the students of Acme Technical College. The students and faculty of Acme Technical College are also our customers and a poor experience with the technologies that are used to augment their education could adversely affect future enrollment. Lessening computer lab scheduling conflicts and the time it takes to resolve support requests will positively influence the student's learning experience. Reducing churn to other local community colleges, competing technical schools, and the growing online university market is the easiest and most cost effective strategy to increase revenue.

Stakeholder	Major Value	Attitudes	Major Interests	Constraints
IT	Lower Costs	More resources for other projects	Less overhead in support process	Training the support techs
Faculty	Streamline Support Process	Quicker turnaround on getting problems resolved.	Less wait time.	Learning the ticket process.
Students	Streamline Support Process	Quicker turnaround on getting problems resolved.	Less wait time.	Learning the ticket process.

4.1. Project Priorities

There are four top priorities that must be remembered daily. Overall, the project will be schedule driven, and it is a necessity to keep the final project date fresh in the IT Dept's mind to push project efficiency. Training the IT Technicians is the second most important priority. Without trained technicians, the Ticketing System and Knowledgebase are useless. The easiest and most inexpensive way to ensure the success of this project is to communicate to the students, when the changeover will occur. One of the primary reasons for moving to a ticketing approach is to avoid call-ins to IT because of the expense. Having many call-ins early in the projects inception will incur a high cost. Email and flyers will be used to ensure that student call-ins are minimized.

Dimension	Driver (state objective)	Constraint (state limits)	Degree of Freedom (state allowable range)
Schedule	Release SharePoint Server, have techs trained by 12/19/2009, 1/3/2010 for start of Spring Semester	Amount of information in Knowledge base accumulated through Beta Testing.	One week, 12/28/2009.
Training	Have support techs	On the job training.	Up to 40 hours of overtime

	trained in 1 week.	No overtime.	for entire team to learn Knowledgebase and Ticket System. (Only if absolute necessary).
Communications	Start advertising new support process to students 2 months ahead of time.	Almost none. Emails and brochures are very inexpensive.	If pressed for time or resources this can be moved up one month.
Cost	To minimize costs as much as possible	\$12000 (Labor Fees of Team B Consulting)	None. This project's purpose is to lower cost as much as possible by staying under budget

4.2. Operating Environment

The SharePoint Server will be located on campus in an Education Lab environment. The end users will be dispersed throughout the campus, but will not be distant over a large geographic area. The Operating Environment will not require constant uptime, because students will generally not be accessing network resources late at night. This consistent daily window of downtime will allow for upgrades, maintenance, and backups that will be considerably cheaper than solutions needed for large enterprise organizations. The corruption/loss of student information and their assignments cannot occur.

5. Human Resources

Team B Consulting consists of a small staff of IT professionals. Each team member has specific IT specialties that will contribute to the successful completion of the project.

5.1. Team Charter

The team will meet on a weekly basis to discuss the progress of the project and resolve conflicts. If a team member is unable to attend the team meeting, they will be expected to notify the group in advance. They will still be held accountable for their respective assignments and agree to accept new assignments that may be given to them in their absence at a meeting.

The work within the group will be evenly distributed and assignments will be given based on group members' skills. All team decisions must be reached unanimously and any disputes should be resolved openly with all team members present at a meeting.

Weekly meetings may be held via the telephone, Franklin Live (online meeting room), or through an online chat session in which all team members can participate. All other team communication throughout the week should be performed via email, unless the importance of the communication dictates calling the team member's individually. All communication outside of the project team should flow through the Team Leader to provide a single point of contact.

5.2. Technical Skills and Attributes

This project requires many different skills. Team members must be reliable, responsible, and communicate effectively to ensure all deadlines are met and that the project is completed on schedule.

Name	Skills	Attributes
David Marks	MCSE, Experienced in server management in the MS Windows Environment	Motivated, careful, task-oriented, reliable, and strong communicator
Amber Painter	Network/System Administration	Detail oriented, professional, self-motivated, responsible, positive attitude
Garett Latham	Desktop Support Technician, A+, Network Programming	Team player, methodical, love learning as much as solving problems

5.3. Roles and Responsibilities

Name	Role	Responsibilities
David Marks	Team Leader	Communicate with professor and project liaison Organize group meetings and remind team members of responsibilities. Provide server for installation of SharePoint.
Amber Painter	Team Member	Edit and proof read documents
Garret Latham	Team Member	Ensure complete documentation of processes
All		Design and configure the SharePoint site and provide detailed documentation.

5.4. Communication Strategies

The team will meet on a weekly basis through the duration of the project. Between those meetings, team members will communicate through email and ensure that all team members are copied on those emails.

6. Project Management

While this is a relatively short project and a basic installation of SharePoint, the project contains several dependencies and requires a tight schedule. Ample time has been given to complete each task and allows time for research and problem solving in the event that a task has problems.

Communication between team members, the IT department, and management will be critical to the success of the project. All stakeholders will receive weekly updates of the project and will be

promptly informed of any project delays or major obstacles. This will ensure proper adjustment to the schedule if needed and create channels for feedback throughout the project's implementation.

6.1. Deliverables

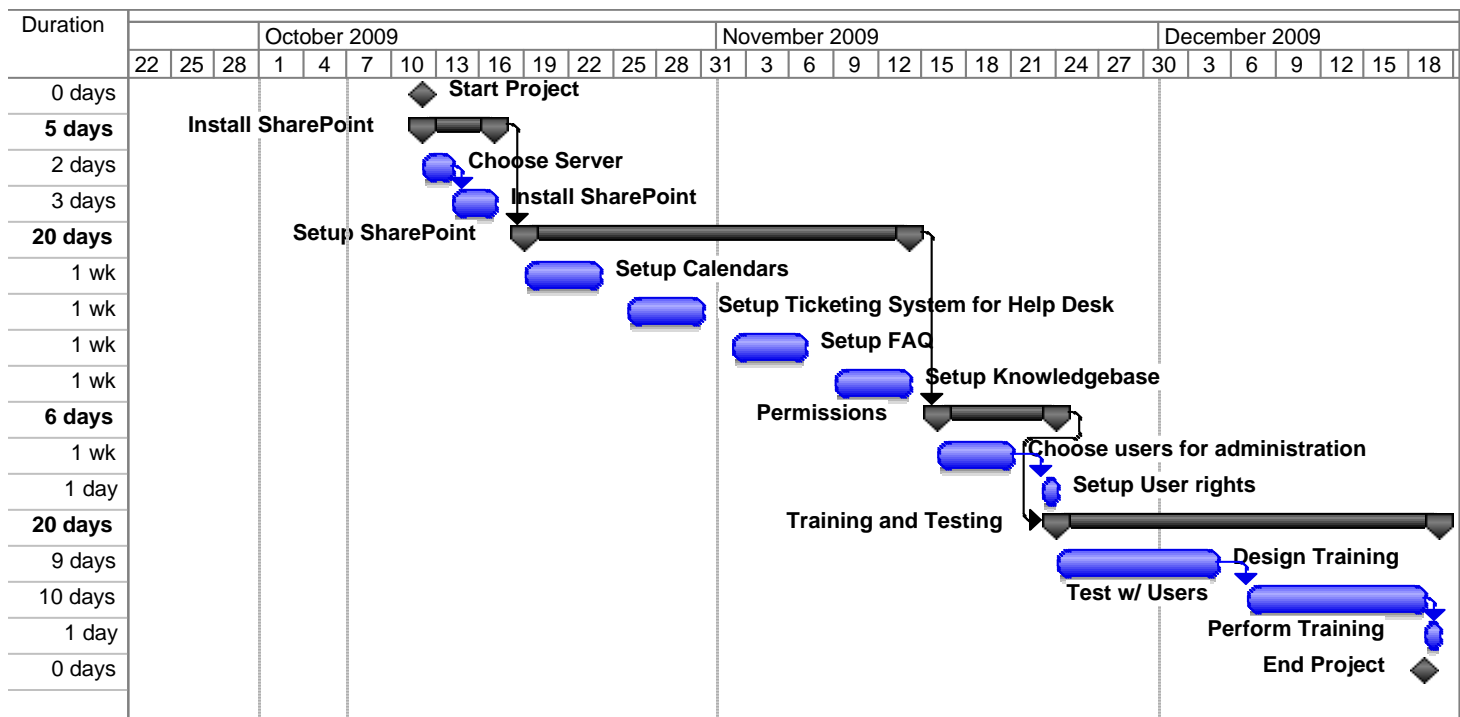
Task Name	Description	Resources
Install SharePoint		
Choose Server	Determine what server to install SharePoint on	David Marks, Garret Latham, Amber Painter
Install SharePoint	Install SharePoint on machine	David Marks
Setup SharePoint		
Setup Calendars	Configure the calendars	David Marks, Garret Latham, Amber Painter
Setup Ticketing System for Help Desk	Setup ticketing database	David Marks, Garret Latham, Amber Painter
Setup FAQ	Create a FAQ site	David Marks, Garret Latham, Amber Painter
Setup Knowledgebase	Create a knowledge base site	David Marks, Garret Latham, Amber Painter
Permissions		
Choose users for administration	Determine users that will require special permissions for the site	David Marks, Garret Latham, Amber Painter
Setup User rights	Apply appropriate permissions for users	David Marks, Garret Latham, Amber Painter
Training and Testing		
Design Training		David Marks, Garret Latham, Amber Painter
Test w/ Users		David Marks, Garret Latham, Amber Painter
Perform Training		David Marks, Garret Latham, Amber Painter

6.2. Dependencies

The table below contains a list of the project deliverables with an associated ID. Project dependencies are designated in the Predecessor column, which contains the ID of a deliverable on which a task is dependent.

ID	Task Name	Duration	Start	Finish	Predecessors
1	Start Project	0 days	Mon 10/12/09	Mon 10/12/09	
2	Install SharePoint	5 days	Mon 10/12/09	Fri 10/16/09	
3	Choose Server	2 days	Mon 10/12/09	Tue 10/13/09	
4	Install SharePoint	3 days	Wed 10/14/09	Fri 10/16/09	3
5	Setup SharePoint	20 days	Mon 10/19/09	Fri 11/13/09	2
6	Setup Calendars	1 wk	Mon 10/19/09	Fri 10/23/09	
7	Setup Ticketing System for Help Desk	1 wk	Mon 10/26/09	Fri 10/30/09	
8	Setup FAQ	1 wk	Mon 11/2/09	Fri 11/6/09	
9	Setup Knowledgebase	1 wk	Mon 11/9/09	Fri 11/13/09	
10	Permissions	6 days	Mon 11/16/09	Mon 11/23/09	5
11	Choose users for administration	1 wk	Mon 11/16/09	Fri 11/20/09	
12	Setup User rights	1 day	Mon 11/23/09	Mon 11/23/09	11
13	Training and Testing	20 days	Tue 11/24/09	Sat 12/19/09	10
14	Design Training	9 days	Tue 11/24/09	Fri 12/4/09	
15	Test w/ Users	10 days	Mon 12/7/09	Fri 12/18/09	14
16	Perform Training	1 day	Sat 12/19/09	Sat 12/19/09	15
17	End Project	0 days	Sat 12/19/09	Sat 12/19/09	

6.3. Schedule



7. Educational/Program Outcomes

There are seven primary outcomes that will be realized and measured throughout the Capstone Course. Our team will meet weekly on Franklin Live and communicate daily via email to discuss our progress in the seven outcomes and make additions to our documents.

7.1. General Education

First, communicating effectively will be required to demonstrate proficiency in all other project outcomes. Citing sources, using correct grammar, and forming valid coherent thoughts will be fundamental in successfully completing the Capstone Course. Second, the critical thinking outcome will allow team members to think logically and critically on many issues. Being proficient in network design will give our team the skills to design, implement, and understand threats to future networks we are responsible for designing. Our team will become proficient in management information systems architecture allowing us to understand and better implement the business components of network. Systems administration proficiency leads to our team using documentation, backup/disaster plans, and common administrative tasks in our future endeavors. Finally, the security outcome will better prepare us to develop security plans and methodologies.

7.2. Information Technology

Our team Capstone Project will measure the success of our SharePoint site by comparing how efficiently it would provide resolution to an end user against the antiquated support system. The server that SharePoint will be installed on will utilize the most current security plans available to our team. For example, security updates will be required and automatic for the OS and applications. In addition, password selection and change protocols will be enacted and enforced on system users. Access to the site will be directly tied to the Active Directory policies for user management of the university. The success in the MIS outcome component will be measured by feedback received by our project's sponsor Kristopher Haley from Keytel Systems and the Professor of the course.

8. Annotated Bibliography

Microsoft Corporation. Introducing the features of a SharePoint site. Retrieved

10/9/2009 from <http://office.microsoft.com/en-us/help/HA011425981033.aspx>