

FAX OVER VOIP INFRASTRUCTURE



PROJECT CHARTER

PROJECT REGISTER NUMBER:

0000

Prepared by	Monika Mason
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1. Project Responsibilities

Name	Project Title	Organisational Unit
Alan McMeekin	Executive Sponsor	ITS Executive Director
Jack Chorowicz	Project Sponsor	ITS – Infrastructure Services
Monika Mason	Project Manager	ITS - IMSP
Jack Chorowicz	ITS Director	Director ITS – Infrastructure Services

Steering Committee Members

The ICE Steering Committee and Reference Groups will perform the same service for the FAX under VoIP Infrastructure Project as the Lotus Notes Project.

2. Service Responsibilities

Name	Task/Role	Organisational Unit
Jack Chorowicz	ITS Service Manager	ITS Infrastructure Services
Tom Maher	IT Support	Network Infrastructure
Leon Troth	IT Support	Identity and Messaging Services
ICE Steering Committee	Benefits Monitoring	
ICE Steering Committee	Business Support	

3. Introduction

3.1 Background

Monash University across its various campuses currently maintains approximately 13,500 PABX based telephone lines on 14 individual PABX systems. Approximately 8% of these, (1,100) are registered as fax lines. Monash Faculties and Divisions all have fax machines, which are used in a variety of ways for a variety of purposes. The estimated annual cost of FAX services is \$465K.

The current suite of PABX systems at Monash are coming to end of life. The approximate support cost for the existing PABX systems is \$400K. They are being replaced with VoIP technology which will be supportable and enable new communications facilities/mechanisms across the Monash University. VoIP technology utilizes the existing Network Infrastructure to carry both Voice and Data.

With the impending move to a VoIP based communication architecture and subsequent removal of current analogue PABX facilities alternatives to the current FAX service needs to be provisioned as well as a transition plan from one to the next.

In many ways FAX is old technology that is limited in functionality and flexibility when compared to e-mail or other electronic forms of communication. To reduce infrastructure support costs and improve business efficiency a coordinated effort would be planned to move transmissions off FAX and onto e-Mail where at all possible.

3.2 Overview

The FAX service provisioned needs to ensure the ability to:

1. Send PC based document (PDF, Office Document, images and others to be identified) to an external FAX number.
2. Scan in hardcopy of document and send to external FAX number.
3. Send same document to multiple FAX numbers in single transaction.
4. Scan in hardcopy of document and send to eMail address (to replace internal FAXing)
5. Send documents directly from SAP and Callista to FAX or eMail address without printing first.
6. Receive to individual FAX accounts on the desk top in PDF format 200dpi
7. Receive to group FAX accounts on the desk top in PDF format 200dpi
8. Outgoing Faxing from multiple e-mail accounts on same FAX number with incoming faxes on same number going to different e-mail account(s).
9. Manage user security and access permissions.
10. Provide security and privacy functionality in accordance with user requirements.
11. Provide billing of FAX usage at defined level.
12. Provide the ability to file, search and archive Faxes.
13. Requirement to interface with Records Management electronic capture of records would also need to be investigated.
14. FAX Client will need to send to the FAX Gateway via "Print" function – emulating a printer – and via e-mail gateway.
15. Preference to have one phone number for FAX and Voice communications. This is not possible under Analogue PABX system, but may be supported under VoIP PBX.
16. Incoming FAX transmissions terminate at Network Printer.
17. Outgoing FAX transmissions from Network Printer (MFD) capable of scan to e-mail.

There are a number of technical solutions to provisioning the above functionality, it has been established that due to the number of fax lines that we have, whose numbers we don't want to change, it would not be cost efficient to use a FAX Service. An internal Fax Gateway has been identified as the most cost efficient. The project Change Management Plan will need to aim at change in business behavior as follows:

1. Using PC based tool instead of physical FAX machine.

2. Using Multi Functional Device (MFD) or Scanner to capture documents that aren't currently available on PC to then FAX or eMail.
3. From sending FAXes internally (FAX to FAX) to sending them from eMail to eMail accounts. This could be achieved using Multi Functional Device (MFD as stipulated by Printing Strategy defined by SpendWise Project) or scanner if not already captured entirely on PC.
4. Capturing e-Mail or fax details from Suppliers and registering in SAP.
5. Defining the user's requiring a FAX number and mapping them to existing e-mail account.
6. Defining the functional groups requiring a FAX number and mapping them to existing or new e-mail account.
7. Defining Security and Privacy requirements for groups and individuals
8. Define the Billing Requirements for FAX services.
9. Defining the current and planned scanning or MFD availability for each area.
10. Defining OH&S or Emergency Procedures that rely on FAX services and their requirement.

The over-arching collaboration strategy is to use a single platform for collaboration. This would suggest that one of the best options functionally would be to be able to send and receive FAXes from the Lotus Notes platform that is being used for Calendar and eMail.

Any form of FAX from PC service would require scanning to mail or fax or PC capability. As the SpendWise Project rolls out its recommendations this will resolve the issue, but this may take up to 5 years to be fully taken up across the university.

From a risk perspective it may be required to provision Buildings or Areas with analogue phones for use in the event of Network / Power failure.

4. Objectives

4.1 Strategic Objectives

The strategic objective that this project will impact is/are:

Strategic Objective
Research Excellence.
Impact through Research Training and Engagement and Collaboration
Learning and Teaching Excellence
Utilising our multi campus nature to our greatest academic benefit.
Ensuring that our international Partnerships, campuses and centres enhance our achievements in research, education and community engagement and that their financial benefits are optimised.
Enhancing our research profile through international presences
Fostering internationalism amongst the Monash community.

4.2 Project Objectives

The key project objective(s) is/are:

Key Project Objectives
Provision service or services that will meet the current FAX service functionality.
Improve productivity of users by change in business process.
Reduce the number of FAX lines by 80%

5. Benefits

The key project benefit(s) are:

Key Project Benefits
Improved business productivity in sending FAXes.
Reduced cost of FAX services.
Enables the decommissioning of the PABX services once VoIP has been rolled out.
Alignment with Green initiatives to reduce the use of paper by avoiding printing and then FAXing PC captured documents.

6. Scope

6.1 In Scope

- Get approval for FAX to e-Mail strategy from ICE Steering Committee, Reference Groups and User Groups.(Done)
- Define the suite of technical services that could be provided and perform a cost comparison based on current fax usage. (Done)
- Ensure that e-Mail capacity exists to take over the FAX communications. (Done)
- Perform detailed analysis of Fax requirements group by group, mapping existing to proposed processes and services. This would include security and billing requirements.(In Progress)

- Identify opportunities to migrate off FAX onto eMail. (Done)
- Define rollout strategy for FAX in line with the VoIP and MFD (or current scanning capability) rollout and define Grouping for the FAX rollout. (Done)
- Initiate activation of “Scan to Mail” functionality of existing MFDs with responsible IT departments. (In progress)

- Build technical infrastructure to support FAX service.(Done)
- Create Training Materials (Done)
- Create Training Schedule in line with rollout strategy and ICE Change Program. (Done)
- Create Communications Plan in line with ICE Change Program (Done)
- Perform Training (Started)

- Provision Analogue FAX services outside of PABX as required for emergency or OH&S. (Done)

- Schedule Analogue FAX removal in line with all the above. (Not Started)

6.2 Out of Scope

- Faxes that are not on Monash University owned PABX
- Physical removal of ALL the FAX machines. Options will be provided to the Faculties and Divisions, but as the equipment is owned by them they will need to dispose of.
- Decommissioning PABX
- Campus Faxes that are outside of Victoria, Australia
- Provisioning analogue – digital conversion devices (this will be part of the Phone Deployment Project)
- Lotus Notes integration – connector will be purchased and installed on FAX gateway. Configuration will need Lotus Notes to be fully deployed, which will not be until late 2008.
- Purchase or Implementation of MFDs or desktop scanners

7. Success Factors

Successful completion of this project will be measured as follows:

- No disruption to FAX capability
- Minimal amount of user angst in migrating from Analogue FAX to PC based FAX
- 80% of existing FAX machines can be removed by December 2008.
- Approved Plan exists for the removal of all FAX machines attached to the PABX

8. Stakeholders

The stakeholders for this project are the same as the ICE Program, with additions of higher focus on:

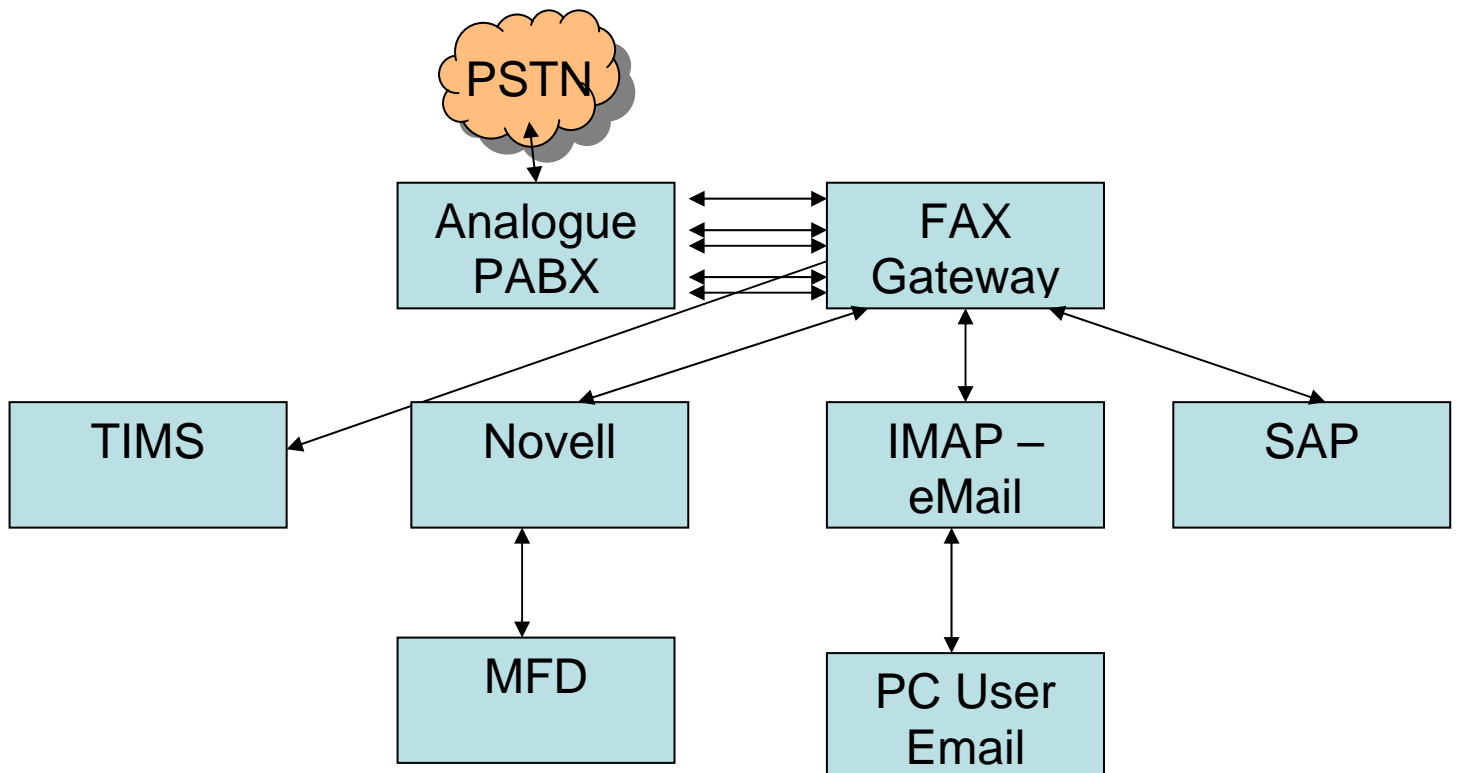
- Faculty and Division Resource Managers
- Switchboard and Telephony Installations
- Leon Troeth – IMS, from IMAP and Directory perspective.

9. Technical Framework

There are a number of technical solutions that are to be investigated:

- SAP FAX Gateway.
- E-mail client FAX Gateway and Client
- Novell Network and Printer Queues

It must be kept in mind that the FAX solutions provided will need the ability to scale up and down easily.



10. Related Projects

Other projects that this project impacts/is impacted by are:

Project	Nature of Relationship Dependency(ies)
ICE Program	Parent Program
VoIP	Parent Program
VoIP Core Rollout	Initiating Project
User Deployment	Initiating Project
Voice Mail for VoIP	Parallel Project
Contact Centre for VoIP	Parallel Project
Billing for VoIP	Parallel Project
Switch Board for VoIP	Parallel Project
PABX Decommissioning	Dependant Project
Audit and Records Trim Rollout	Closely Related and aligned
SpendWise – MFD Rollout	Dependency

11. Constraints

- Roll Out / existence of MFD and Scanners with scan to mail capability
- Roll Out of VoIP and the subsequent removal of the analogue PABX.
- Audit and Risk Management requirements
- Records and Archive requirements for TRIM system.
- Monash University Policy and Procedures.
- Monash University culture and willingness to change.

12. Risks

Please see the Risk Register attached in appendix.

13. Approach

Milestones/deliverables for this project are:

Milestone/Deliverable	Estimated Completion
Define SAP FAX Gateway implementation schedule and press for early implementation.	01/07/2007 (Done)
Define the suite of technical services that will be provided and perform a cost comparison based on current fax usage and projected FAX usage.	01/07/2007 (Done)
Define rollout strategy for FAX and business process improvement in line with the VoIP and MFD (or current scanning capability) rollout.	01/10/2007 (Done)
Develop Project Controls: Document Repository, Risk Register, Detailed Project Schedule (including resourcing), Change Log, Task Assignment Sheets.	01/09/2007 (Done)
Build technical infrastructure to support FAX service.	30/09/2007 (Done)
Develop FAX disposal Options	30/09/2007 (Done)
Develop Test Plans.	30/09/2007 (Done)
Test and Tune FAX gateway.	15/10/2007 (Done)
User Testing of FAX Gateway	30/10/2007 (In progress)
Production Transition (Help Desk, Technical Support, Budgets)	30/10/2007 (In progress)
Create Training Materials	30/10/2007 (Done)
Create Training Schedule in line with ICE Change Program principles and approach.	30/09/2007 (Done)
Stakeholder Analysis	30/08/2007 (Done)
Detailed Requirements Gathering	30/09/2007 (Done)
Develop Rollout Strategy	30/10/2007 (Done)
Define ongoing Analogue FAX Requirements	30/10/2007 (In progress)
Create Communications and Change Management in line with ICE Change Program principles and approach.	30/10/2007 (Done)
Pilot of ITS Fax Services	November 2007 (In progress)
Berwick Campus Roll Out	March 2008
Faculty of Education	March 2008
Faculty of Law	April 2008
Clayton Campus	April – May 2008
Caulfield Campus	April – June 2008
Penninsula Campus	May – June 2008
Gippsland Campus	May – June 2008
Remaining	August – December 2008
Provision Analogue FAX services outside of PABX as required for emergency or OH&S for Final Group Facilities	TBA
Project Closure and PIR.	TBA

14. Costs / Funding Arrangements

A 3 year summary projection that details development and production costs.

Project Budget Summary

This project would require the following resources in 2007

Days	Title
70	Project Manager
20	Communications Specialist
90	Business Analyst and Business Process Re-Engineering specialist.
20	Network Engineer
20	Messaging Services Engineer
5	IT Security Engineer
15	EWS Engineer

240 days effort in 2007 ~ \$120,000

FAX Gateway ~ \$130,000

As similar amount of effort would be required in 2008, but there would be a shift in effort from the Project Manager to the BA.

Days	Title
30	Project Manager
20	Communications Specialist (contractor)
130	Business Analyst and Business Process Re-Engineering specialist. (Contractor)
10	Network Engineer
20	Messaging Services Engineer
5	IT Security Engineer
5	EWS Engineer

150 days internal effort

70 days external effort ~ \$110,000 (once off)

↳ \$40,000 (Allocated for Casual Staff)

Production Costs and Funding Agreement

Funding is being sought.

15. Quality Plan

Project Management Methodology is being followed.

ICE Change Management Program is adhered to.

16. Communications Plan

Communications will be planned and executed in concert with the broader ICE Program communications.

17. Relevant Legislation / Policies

All IT Policies can be viewed at the following link:

<http://www.its.monash.edu.au/policies/>

Those especially relevant are:

IT Use Policy – Staff and other authorized users.
University IT Strategic Plan
IT Policy Development
IT Security Policy
Telecommunications Services Policy

18. Staff Impact / Change Management

The Project Team will consist of:

Program Manager
Ian Hall – IMSP

Change Manger
Liz Martin - IMSP

Project Manager
Monika Mason – Project Office

Technical Architect
Kheeran Dharmawardena – Network Infrastructure Services

Technical Lead
Con Sirakis – Network Infrastructure Services
Samantha King- Network Infrastructure Services

Business Analyst
Cam Murdoch
Shruti Sudhindra – Greythorn Contractor

19. Assumptions

eFAX Service (External FAX Gateway – Outsourcing)

eFAX service will not be suitable as there is a requirement to maintain the current phone numbers. This is difficult for Monash University to do as they purchase a block of numbers from Telstra. It is not impossible to do, but would require the fax to come into the Monash PABX then be redirected out to the eFAX service.

Additionally it is perceived that the eFAX service will be substantially more expensive for 1000 -1500 fax numbers than an internal fax gateway as the per line rental is expected to be between \$5 and \$10 monthly for each line. This cost almost outstrips the implementation cost of the fax gateway and cannot be offset by handing lines back to Telstra as we purchase lines in blocks.

20. Consideration by ITS Division Sections

Each Project Charter needs to be considered by all sections within ITS. The Project Office can assist with this, but it is the Project Manager's responsibility to drive the process. This process is not intended to achieve commitment; this needs to be handled with detailed and timely communication and may occur sometime after the initial Charter Development. However, getting each section to consider the Charter early in the project results in a more effective planning process and higher quality Charter document.

Department	Details
AS – Flexible Learning & Teaching	Discussed with: Emily Feher Comments: Date:
AS – Integrated Administrative Systems	Discussed with: Lindsay MacDonald Comments: Date:
AS – Web Resources & Development	Discussed with: Sue Steele Comments: Date:
CS – Client Communications	Discussed with: Claire Nicholls Comments: Date:
CS – Service Desk	Discussed with: Anne Pirera Comments: Date:
IS – Identity & Messaging Services	Discussed with: Leon Troeth Comments: Date:
IS – IT Security and Risk	Discussed with: Steve Oxley Comments: Date:
IS – Network Infrastructure Services	Discussed with: Tom Maher Comments: Date:
IS – Shared Systems	Discussed with: Alfred Tan Comments: Date:
IS – Production Facilities	Discussed with: Steve White Comments: Date:
IS – Enterprise Workstation Services	Discussed with: Pushpa Patel Comments: Date:
IM&SP – Project Office	Discussed with: Monika Mason Comments: Date:
IM&SP – IT Architecture	Discussed with: Ian Hall Comments: Date:
IM&SP – Information Management	Discussed with: Nathan Bailey Comments: Date:

21. Appendices

a. Risk Management Plan

Risk	Likelihood	Impact	Risk Rating	Impact	Mitigation Strategies	Assigned To	Status
Fax email groups may not be set up appropriately.	Likely	Moderate	High	Satisfaction with PC Faxing goes down	Minimisation: Training and Communications prior to rollout.	Monika	Planned
There is insufficient LAN storage space to store electronic Faxes	Unlikely	Major	Medium	Faxes will need to be printed and hardcopy stored. This cancels one of the benefits of PC faxing.	Acceptance: Faxes will contribute to less than 1% of existing e-mail. The LAN storage is a general issue that needs to be dealt with outside of the project.	Monika	Closed
Inappropriate Fax service provided due to assumptions about FAX practice.	Possible	Moderate	Medium	PC Faxing may not be suitable for all Fax users. Satisfaction with PC faxing goes down. Reduced take up of PC faxing.	Minimisation: Communication both in person and via electronic means with people actually using the Fax services. Each Fax number to have "Owner" who decides on the Fax service options.	Monika	In Progress
Migration to production without appropriate processes in place for standard requests / support.	Possible	Moderate	Medium	Satisfaction with PC Faxing goes down	Minimisation: Follow Release Procedures - Ensure appropriate Service Statement exists and is agreed. Ensure Support owner and procedures are agreed prior to release Ensure that Help Desk Materials and Training are in place prior to release.	Monika	Planned
Release of PC Faxing has a negative impact on Phone Delegates. Confusion and extra work.	Possible	Moderate	Medium	Satisfaction with PC Faxing goes down		Cam Murdoch	
CBT for SAP becomes out of Date	Possible	Moderate	Medium	Effectiveness of CBT is diminished.	Remove: Ensure that CBT for SAP is updated as part of the Finance SAP FAX gateway rollout.	Phillip Wheatland	Planned

Induction Procedures become incomplete / out of date.	Possible	Minor	Medium	Effectiveness of Induction is diminished.	Minimisation: Contact HR departments to ensure that adding new staff to appropriate FAX service is part of induction process	Monika	Planned
Staff feel overwhelmed by changes - FAX becomes the straw that breaks the camels back.	Unlikely	Major	Medium	Staff satisfaction with working at Monash is diminished.	Minimisation: Fax rollout will be scheduled to occur during off peak periods and prior to the telephony VoIP rollout.	Monika	Closed
Take up of PC Faxing is slow	Possible	Major	High	Complexity and cost of VoIP telephony rollout is increased.	Minimisation: Ensure that the PC Faxing is SOLD as an attractive alternative. Solid communications and training.	Monika	In Progress
Negative impact to Service Desks	Possible	Major	High	Service Desk unable to respond to user requirements.	Minimisation: Liaise with Service Desks to provide project support contacts during rollout. Ensure that training is affected prior to rollout for both users and Service Desk.	Monika	Closed
SAP Vendors won't take up.	Unlikely	Moderate	Medium	PO will still need to be manually FAXed to vendors that don't take up.	Minimisation: Co-ordinated communications with the Vendors in advance of rollout.	Phillip Wheatland	Planned
Dirty SAP Data - incorrect fax number.	Likely	Moderate	High	Fax transmissions will fail out of SAP and faxing will need to be done via MFD. Benefit of the project will not be able to be realised.	Minimisation: Plan to clean Vendor Fax and e-mail data prior to release.	Phillip Wheatland	Planned
Dirty MIDS Data - FAX details missing from Mids.	Possible	Moderate	Medium	Fax machines not known will not be migrated to PC faxing and will not have plans to connect to analogue/digital converter and hence will not be functional after VoIP rolled out.	Acceptance:	Monika	Closed
Scan to mail functionality not widely enough available to support broad use of PC Faxing.	Possible	Major	High	PC Faxing is not able to be migrated to areas that have no scan to mail capability.	Minimisation: Follow up on areas with no scan to mail capability and attempt to have this capability installed.	Monika	In Progress

SAP Environment becomes more complex	Likely	Minor	Medium	Testing will take longer and SAP projects will cost more.	Minimisation: Ensure that an appropriate test environment for SAP is provisioned as part of the SAP Fax Gateway project.	Monika & Phillip Wheatland	Planned
Test FAXes are transmitted to production vendors during testing.	Possible	Major	High	Monash will incur expenses that are not warranted.	Remove: Ensure that SAP test environment is configured to only send to internal FAX number in SAP testing area.	Monika & Phillip Wheatland	Planned
Errors go to production due to the Test environment not emulating the production environment closely enough.	Possible	Moderate	Medium	Quality of Service for both FAXing and SAP are reduced.	Minimise: Ensure that test environment emulates production.	Monika	Planned
Project delivery is delayed due to lack of clarity on Vendor Role	Possible	Moderate	Medium	Gaps in resourcing exist.	Minimise: Meet with project team and vendor to clarify roles and responsibilities.	Monika & Phillip Wheatland	Planned